

## Joint Claims for JSA: Age Range Extension - Qualitative Evaluation

Joint Claims for JSA forms a key part of the government's strategy for reducing the number of workless households.

Previously, one person in a couple claimed on behalf of their partner, and the partner did not have to seek work. Under Joint Claims, both members of the couple must actively seek and be available for employment. When it was introduced in 2001, people were eligible for Joint Claims where at least one of them was born after 19 March 1976. Only couples without dependent children were affected. The age range was extended in October 2002 to include couples where at least one was aged between 18 and 45 at the time of implementation.

This report presents findings from the qualitative evaluation of the age range extension. The research involved individual in-depth interviews with Joint Claimants, as well as two phases of interviews with Jobcentre staff involved in delivering Joint Claims. A complementary quantitative study has also been conducted.

### Key Findings

- There was evidence that the extended Joint Claims had encouraged some previously dependent partners to consider working, as well as increasing job search activities among some main claimants.
  - There was general support amongst staff for Joint Claims. Extension customers also generally accepted the policy. The most positive reactions came from previously dependent partners keen to work. However, there was resistance to change among some men with more traditional values.
  - Customers in the extension age range had greater perceived barriers to work than younger Joint Claimants. These included health issues, limited work experience or qualifications, employer prejudice, and caring responsibilities.
- These barriers were most strongly felt by previously dependent partners.
- Customers were a diverse group in terms of lifestyle, relationships with partners, health and outlook.
  - Jobcentre processes were not generally considered flexible enough to accommodate individuals' or each couple's varying needs. It was suggested that greater choice should be available to customers in terms of joint or single interviews, interview lengths, training options and signing procedures.
  - There was felt to be potential for clearer communication of the rationale behind Joint Claims (including the Extension) to both staff and customers. There was a particular need for better explanation of the financial implications of couples' actions.
  - In theory Joint Claim customers can choose between an individual or joint interview when they first claim. However, whether they attended together or separately appeared to depend more upon adviser preference or Jobcentre policy.
  - Joint interviews were felt to result in a better understanding of the couple's circumstances. However, staff were more comfortable with the familiar format of single interviews, and needed more guidance in best practice for conducting joint interviews.
  - Amongst staff, there was some confusion at contact centre/ reception stage over exception/ exemption criteria. There were also difficulties with Jobcentre IT systems, particularly JSAPS, which need to be improved.
  - Jobcentre staff suggested that Joint Claims be extended further to older couples and those with school-age children, provided that careful consideration was given to the potential impact on Jobcentre workloads.

# Executive Summary

## Background

Joint Claims was first introduced in March 2001 for certain couples claiming JSA at the higher rate for a dependent partner. It requires both partners to be available for and actively seek employment. People were initially eligible for Joint Claims where one or both partners were aged over 18, that is at least one was born after 19 March 1976. Only couples without dependent children were affected. The age range was extended in October 2002 to include couples where at least one was aged between 18 and 45 at the time of implementation. This research concerns the extended age range.

## Research objectives and methodology

The aims of the research were two-fold: to consider the impact of the Joint Claims Extension on the individual and the household with respect to labour market participation, and to explore factors which affect the operation and delivery of the Joint Claims Extension. The research comprised in-depth interviews with staff and joint claimants, including 'stock' (already claiming before the Extension was introduced) and 'flow' (not claiming until after the Extension began) customers. The research complements a separate quantitative evaluation.

## Key findings

### Extension customers

The number of Joint Claims extension customers was lower than anticipated by staff. This meant that there was little opportunity for staff to become confident in dealing with this group. Joint Claims Extension customers were more diverse than the 18-24 age group, expressed through their lifestyles, relationships with partners, their health and outlook. They expressed similar barriers to work to younger customers. However, there were

specific barriers more keenly expressed by this older group, including health issues, limited work experience or qualifications, employer prejudice and caring responsibilities. These barriers tended to be most strongly felt by previously dependent partners. In addition, some men with more traditional values expressed reluctance for their partners to work on cultural grounds.

### Introducing the Joint Claims Extension

Neither staff nor customers felt that the Joint Claims Extension had been widely publicised. Staff had received information via the Intranet, handouts or verbal communication, and basic, mainly generic, Joint Claims training had been conducted within Jobcentres. Customers had either heard of the Extension by letter or in the Jobcentre.

### Implementing the Joint Claims Extension

There was evidence, even after six months, that some staff had problems identifying Joint Claimants and were confused over the exemption/exception criteria at the contact centre/ reception stage. Staff were experiencing ongoing problems with LMS and with the payment system (JSAPS). Some cases had been converted into clerical cases as a result. This suggests a need to review computer systems and staff training needs. Couples had experienced problems when one of them was failing to sign on time as this jeopardised both parties' benefits. It was also questioned as to why payment was made to one claimant rather than both.

### Joint Claims interviews

Customers are in theory allowed to decide between having a joint or individual interview. However, whether they attended together or separately appeared to depend more upon adviser preference or Jobcentre policy. Staff had limited experience of interviewing Joint Claimants and their approaches differed considerably, some conducting separate and others, joint interviews with customers. Joint interviews were felt to result in a better understanding of the couple as a unit. Customers could welcome being able to support each other through a joint interview and share information. There was greater resistance to joint interviews among customers who felt that it duplicated information and therefore wasted

their time (usually 'Stock' customers). Potential improvements included conducting lengthier or more thorough interviews, distributing time more evenly between partners, and introducing more flexible booking systems.

### **Overall reactions to the Joint Claims Extension**

Overall, customers within the Extension group accepted the new system of Joint Claims, even though the merits of joint claiming were not felt to be obvious. 'Stock' customers expressed greatest resistance to the change. Some Muslim or more traditional, older men resented their partner having to come into the Jobcentre, or did not want them to work. Others expressed concern that their level of benefits would be reduced under the new system even if this was not the case in practice. This would suggest that customers would benefit from fuller information regarding the new regime. Suggested improvements to the system included language training where required, more training options, and faster movement into training. Not all of the training provided was considered relevant to individuals' needs. There was a desire for greater choice in terms of when a couple signed for their benefit. There was also resistance to joint payment as it was felt that one person could be penalised by another's failure to sign.

Staff were in favour of the Joint Claims Extension in principle. They supported an extension to older age groups but felt that attention ought to be given to the potential numbers affected by any further extension and the impact this might have on Jobcentre workloads.

### **Not pursued cases**

When Joint Claims was extended, there was some concern that couples may cease claiming due to objections concerning the partner having to look for work.

The research suggested a variety of explanations for not pursuing a joint claim including: initial misidentification (never eligible in first place); separation; finding

work; movement onto Incapacity Benefit; frustration with Jobcentre processes; and fraudulent cases (according to staff speculation). There was little evidence to suggest that couples were dropping out of the Joint Claims process because of an objection to the new policy per se.

## **Conclusions and recommendations**

### **Staff**

Due to the lower than expected numbers of Joint Claimants, the Extension was not felt to have impacted significantly on staff workloads.

Jobcentre staff felt that joint claims could be extended further to include older couples and those with school-age children. However, they were concerned that the availability of local jobs, the likely extent of exceptions and the potential for increasing Jobcentre workloads should be taken into account.

### **Customers**

The Extension appeared not to have had much impact on the way customers made decisions about work. Nor did it appear to alter the nature of relationships. However, it did tend to reinforce strong relationships and exacerbate the tensions in weaker partnerships. Overall, there appeared to have been least impact on 'Flow' customers. This was because these individuals tended to be the most motivated towards work already. Where there was an impact, it was greatest on previously dependent partners, some of whom were now considering work as a result of the Joint Claims Extension. The research suggested that the Extension may also motivate some Stock customers to seek work more actively.

There appeared to be potential for improvements as follows:

- Improve initial communication of the Joint Claims policy and the rationale behind it;
- Ensure that staff understand eligibility criteria and technology, as well as best practice in conducting joint interviews - through further training of reception and contact centre staff in particular;
- Address the JSAPS system in order to resolve outstanding errors;

- Introduce more flexible interview booking mechanisms;
- Broaden the training programmes on offer;
- Improve the scope and relevance of training to customers, including language training where required;
- Review the payment system to ensure that people are not penalised for their partner's failure to sign; and
- Allow more flexible signing times for partners engaged in training, working part-time, or with caring responsibilities.