

Title

The practical and contextual challenges of conducting an independent field evaluation of a new staff role in a care-enabled housing setting

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The practical and contextual challenges of conducting an independent field evaluation of a new staff role in a care-enabled housing setting

Abstract

Purpose – This case study article explores the challenges encountered when conducting an independent field evaluation of a new Community Link Worker role based within a care-enabled housing scheme. The role aimed to enable tenants to remain socially connected, both within the scheme and with the wider local community. It also discusses the factors that helped researchers to overcome those challenges.

Approach – During the evaluation the researchers captured informal reflections relating to the evaluation activities undertaken. Additional reflections were captured when producing the final evaluation report, when the researchers were further removed from the immediacy of the ongoing activities. Discussions between the researchers identified a set of overarching themes that encompassed their experiences.

Findings – The researchers faced several challenges when carrying out the evaluation including misunderstandings and misconceptions relating to the new Community Link Worker role and the evaluation activities, limited opportunities to visit the scheme affecting the ability to build relationships, and an evolving context within the scheme. The researchers’ existing skills and experience helped to mitigate the impact through a solid foundation of planning and knowing how to adapt and be flexible as situations arose.

Originality – While researchers may face challenges while conducting evaluations, they do not often have the opportunity to reflect on their own experiences and acknowledge how challenges were overcome. Rather than focusing on evaluation outcomes and the impact of an intervention, this case study takes a step back to consider the evaluation process and context, and shares insights that other researchers may find valuable.

Background

Loneliness and social isolation are global issues with around 50% of people aged over 60 being at risk of social isolation (Ibrahim *et al.*, 2013; Landeiro *et al.*, 2017) and around 25% of people over 60 reporting feeling lonely (Chawla *et al.*, 2021). This increases with age, and for people aged over 75, the figure is almost one in three (31%) (Chawla *et al.*, 2021). It is estimated that 1.4 million older people in the United Kingdom (UK) are often lonely (Age UK, 2023), while the National Health Service (NHS) say that “hundreds of thousands of elderly people are lonely and cut off from society in [the UK], especially those over the age of 75” (NHS, 2022).

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3 Additionally, loneliness and social isolation impact on quality of life as well as a
4 person's mental and physical health (Chawla *et al.*, 2021; World Health Organization
5 (WHO), 2021). They are widely acknowledged as being risk factors for all-cause
6 morbidity and mortality (Landeiro *et al.*, 2017; Luanaigh & Lawlor, 2008), comparable
7 to other well-established risk factors for mortality such as smoking, obesity, alcohol
8 consumption and physical inactivity (Luanaigh & Lawlor, 2008; WHO, 2021).
9 Furthermore, social isolation is a recognised modifiable risk factor for developing
10 dementia (Livingston *et al.*, 2024).

11 Research has also linked loneliness to other serious health-related consequences
12 such as heart disease and a decline in physical health and wellbeing, with it being
13 recognised as one of the three main factors leading to depression (Luanaigh &
14 Lawlor, 2008; NHS, 2022). Depression and loneliness are major issues affecting
15 older people's quality of life (Singh & Misra, 2009), but up to one in five cases of
16 depression in older adults could potentially be prevented by reducing loneliness (Lee
17 *et al.*, 2021).

18 Being physically distant from people, for example living in a rural area, or living alone
19 with limited social interaction can increase the risk of loneliness. Care-enabled
20 housing schemes are designed for people wishing to live independently, with tenants
21 being able to access additional support and services as needed. It can be tempting
22 to think that social isolation and loneliness are no longer a concern when a person is
23 living in such a scheme where they are surrounded by staff and fellow tenants.
24 However, the independent living nature of care-enabled housing can inadvertently
25 heighten the risk of social isolation, exclusion and loneliness, particularly among
26 vulnerable and social minority groups, such as people living with dementia who can
27 become increasingly confined to their apartments as dementia progresses (Atkinson
28 *et al.*, 2023; Atkinson & Oatley, 2024; Oatley & Atkinson, 2024; Shaw *et al.*, 2016;
29 Willis *et al.*, 2022).

30 The provider of a new-build care-enabled housing scheme looked to introduce a
31 'Community Link Worker' (CLW) role for an initial pilot period of two years to help
32 tenants remain socially connected, both within the scheme and with the wider local
33 community. The role was developed with an overarching aim to enable tenants to
34 enjoy an enriched lifestyle, reduce the impact of loneliness, and improve their overall
35 wellbeing. This would be achieved by the CLW working in partnership with individual
36 tenants, tenant groups, staff, volunteers, and other external organisations,
37 supporting and enabling tenants to identify and achieve their goals whilst considering
38 individual emotional and physical needs.

39 As this was a new role to the scheme, and indeed the provider, there was a desire to
40 evaluate its implementation and how it worked in practice. An independent or
41 external field evaluation was the preferred option as the evaluators would be more
42 removed from the situation and so could interpret the data from an objective external
43 perspective (Arco, 2024). They would also remain impartial and not be influenced by
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other parties, offering credibility to any findings (Arco, 2024; Better Evaluation Knowledge, 2024).

The [anonymised for review], was commissioned to conduct a two-year independent evaluation of the new CLW role to explore how it worked within the housing scheme and the impact it had on the people living and working within that scheme. During the project, the researchers encountered a range of challenges which required skilled negotiation and management. This case study presents an overview of the strengths and positives from the evaluation alongside the main practical, contextual and methodological challenges faced, before examining the key factors that enabled its timely completion within the agreed scope.

Approach

The evaluation context

The plan for the independent field evaluation was to use a mixed-methods approach to capture data and insights from multiple sources. The main activities included:

- Scheme-wide pre/post intervention surveys with the tenants to capture both quantitative and qualitative data before the CLW was in post and later when they were embedded within the scheme.
- Case study interviews with six tenants/tenant dyads to explore the impact of the CLW in greater depth. These would be repeated at different time points during the evaluation to ascertain whether perspectives changed over time.
- Interviews with staff members to understand their perspectives on the changes brought about within the scheme, both for tenants and for staff.
- Regular reflective diaries completed by the CLW to provide an insider perspective on how the role operated in practice, supported by online catch-up meetings.

The evaluation received favourable ethical approval from the [anonymised for review].

Reflection

Two researchers with experience in conducting evaluations were assigned to the project and carried out three joint visits to the scheme during the course of the evaluation. Each visit lasted 2-3 days to maximise time at the scheme. The researchers conducted some activities separately, e.g. case study interviews, however they were able to discuss and debrief at the end of each day and after each visit. This enabled them to capture their immediate reflections on what had gone well during the visit, any challenges encountered, and how to proceed with subsequent phases of the evaluation. Producing the final project report for the host scheme also provided the researchers with an opportunity for critical reflection on the project as a whole, benefiting from greater distance from the immediacy of ongoing evaluation and data collection activities.

This article uses the researchers' reflections to identify and explore some of the main challenges encountered regarding the evaluation, but does not consider additional practical challenges such as travel, illness etc. as these are beyond the remit of the evaluation. While a formal analysis of the reflections was not conducted, discussions between the researchers identified a set of overarching themes that encompassed their experiences.

Findings

The challenges fell into four main themes, as presented below. Consideration is also given to the elements that helped the researchers to respond to and overcome the challenges.

Misunderstanding of the CLW role

Before the evaluation had begun and the CLW post was filled, the role description was revised, generating potential confusion regarding how the CLW would operate in practice. However, a key constant within different iterations of the role description was that the role's underpinning purpose was to listen to tenants and enable and support them in realising their wishes, rather than anticipating these in a paternalistic fashion.

Through the evaluation it soon became apparent that the CLW had not fully understand how their role should differ from that of a typical Activities Coordinator, for example working with and alongside tenants rather than designing daily programmes of activities. Instead, the CLW had fallen into a pattern of organising events for tenants and focusing on group activities. This caused some tensions within the scheme. The CLW resigned after being in post for 20 weeks. The researchers were then presented with an evolving challenge as within a relatively short period they first had to adapt to evaluating a role that differed from the intended role, then to decide how best to continue with the evaluation in the absence of the role and explore the consequences of its discontinuation.

What helped in this situation was ongoing communication between the researchers, staff at the scheme and key project stakeholders from within the provider organisation to ensure that everyone was kept informed of developments. It was also important for the researchers to reinforce that, by being independent from the scheme, they had no preconceived expectations regarding the evaluation and no incentive to find a particular outcome. From an evaluation perspective, the aim was not to determine what was right or wrong, because all findings were considered valuable data that helped to tell the story. By being independent and impartial it is sometimes easier for researchers to see when an element of a project, such as how a role is being translated into practice, is not progressing as planned, but it's not their place to try and address it. However, by getting multiple perspectives they can explore what the issues are and use the evaluation activities to give others the space

and opportunity to reflect on the situation and identify areas for development for themselves.

Misconceptions

While it was beneficial for the researchers to be independent from the scheme, introducing a third party into the mix also resulted in misconceptions regarding responsibilities. Several tenants were under the impression that the University of Worcester had employed the CLW and was managing them, possibly due to the evaluation and the CLW role starting at similar times. The regular reflective diaries and catch-ups also caused some confusion for the CLW who did not appreciate that these were evaluation activities rather than a standard part of their role. This resulted in the CLW thinking that they were managed by the researchers. These misunderstandings occurred despite the researchers and the evaluation paperwork clearly stating that the research team was independent from the scheme and only there to evaluate the new role.

What helped in this situation was ongoing communication and repetition, with the researchers addressing and correcting any misconceptions whenever they were encountered. During the visits to the scheme, the researchers also made sure to spend free time in communal areas where they could answer any questions that tenants or staff had, regardless of whether they were part of the evaluation activities or not. This included attending a coffee morning prior to the start of the evaluation in order to explain it to the tenants in an informal context.

Building relationships

Working at arm's length and being limited to a few visits during the evaluation period presented challenges for the researchers in terms of developing relationships with both tenants and staff at the scheme. A degree of distance and independence can be advantageous in some cases as people may be more open to sharing their view with someone who is not considered a 'friend' or directly involved in their care or support. However, some level of rapport and relational trust is required to ensure that potential issues are identified and raised in a timely manner to minimise potential impacts on the evaluation. For example, it was noted that the tenants occasionally worried about saying the 'wrong' thing or were concerned about staff being aware of their survey responses, despite these being completed anonymously.

In this case, it helped the researchers to use all opportunities to get to know tenants, and not just those involved in the more in-depth case study interviews. The duration of site visits was extended slightly to enable the researchers to have 'down time' at the scheme outside of the scheduled evaluation activities. This was done, not only by spending time in communal areas where tenants would get to recognise the researchers, but also by the researchers attending social events within the scheme. This provided opportunities for tenants to ask questions or express their concerns in a less formal environment, and for the researchers to provide reassurance about

what they were aiming to achieve and how the data was going to be used. It also meant that tenants remembered the researchers between visits and so became more comfortable and relaxed with their presence.

It was also beneficial to have a tenant and a family representative as members of the project's Advisory Group alongside scheme staff and key stakeholders from the provider organisation. This provided transparency and insight around how the evaluation was progressing and further reassurance regarding data usage. While many Advisory Group meetings were scheduled to coincide with visits to the scheme, additional online meetings helped to maintain links with the scheme between visits.

Spending time with staff during the visits was also key to help develop relationships and make it easier for the researchers to ask for assistance with scheduling interviews, especially as this needed to be done prior to a visit. Having key contacts within the research team and scheme also helped as there was a clear channel of communication which avoided potential confusion or messages being missed.

Moving picture

As indicated previously, the evaluation did not proceed as originally planned. This created the possibility of tension or embarrassment between the various parties involved. For example, the scheme may have been embarrassed when the CLW did not appear to be fulfilling the role as intended and resigned fairly early on, while the researchers felt pressure to adapt their evaluation activities in response to ensure successful completion of the project.

What helped was having that good foundation of communication, which encouraged all parties to be open and honest about what was happening and when changes were required. The researchers also produced interim reports at key points during the project and held regular Advisory Group meetings to ensure that everyone was aware of progress, changes, and potential issues, so there were no surprises at the end of the project.

The researchers' experience was also a key factor, as it ensured that while potential challenges could not necessarily be anticipated, the evaluation design incorporated sufficient flexibility to enable it to adapt and respond to any emerging issues. For example, using multiple types of data collection activity meant that the evaluation was not reliant on one specific source of data, so even when the CLW reflective diaries were no longer being completed there was still sufficient data available. Recruiting more case studies than needed also helped to reduce the impact of one dyad withdrawing, and similarly conducting multiple visits to the scheme at different timepoints meant that if one visit was cancelled or delayed there was minimal impact.

Comparing the evaluation process to the findings

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It was also observed that the evaluation findings reflected the evaluation process to some extent. For example, a key finding from the evaluation related to the concept of empowerment rather than providing activities, and that the CLW role was fundamentally about working with and empowering tenants, not doing things for them. This highlighted the need for authenticity and listening to the tenants to find out what was important to them. From an evaluation perspective, this reflected the importance of ensuring that different voices were heard, such as tenants, staff and the CLW, not just as participants in the data collection activities but also as Advisory Group members with oversight of the project.

It was also found that the community that developed naturally within the scheme was more important and effective at ensuring people were included than having a dedicated staff role. In particular, the small interpersonal connections that can often go unnoticed or take time to establish appeared to have a greater impact than ‘grand gestures’ aimed at reaching the whole scheme immediately. This underlined the need for time and authenticity rather than trying to engineer situations which would ‘encourage’ connections. For the researchers, this related to spending time at the scheme outside of the evaluation activities, meeting tenants and staff in their own space, and getting to know them as people rather than participants.

Finally, another finding that related to both of the above findings was that, rather than having a specific CLW role to enrich tenants’ lives, it was actually everyone’s responsibility and was embedded within the scheme itself. In reality, staff were already using all direct and indirect interactions with tenants to strengthen relationships, identify what could be done to support tenants, and notice potential issues as they arose. Tenants were also looking out for each other and initiating activities and events to bring people together based on common interests. Similarly, although researchers need to remain independent, they cannot work in isolation in this context. They need to be aware of the wider situation beyond their evaluation activities, pick up on possible tensions, invite and take onboard feedback, and reflect regularly together. This should ensure that the evaluation is appropriate in terms of approach and implementation, and is capturing the right data, rather than potentially persisting with activities that do not reflect an evolving situation.

Discussion

Conducting an independent field evaluation can be challenging at times, with communication and openness being key underpinning factors that can help to overcome these challenges. Independent evaluations are beneficial as they offer an open and objective interpretation of data from a detached, external perspective that is interested in finding out what is going on and why (Arco, 2024). Independent researchers do not have previous knowledge of the situation, in this case the scheme, staff and tenants, which could influence how data is interpreted. They also have the experience and skills to appropriately plan an evaluation and react accordingly should issues arise that require a change in approach. A risk of

conducting a self-evaluation is bringing your own preconceptions or biases, or subconsciously focusing on positive aspects that reinforce what is already thought to be happening (Arco, 2024; Boehmer *et al.*, 2013; Deffuant *et al.*, 2024).

This particular project also highlights the importance of persevering with the evaluation even after the CLW role being evaluated ended prematurely, as it provided the opportunity to consider the unexpected 'post CLW' phase. Several positives identified in the evaluation would have been automatically attributed to the CLW role if it had continued. Instead, the evaluation captured the natural evolution and development of relationships and community over a period of time. It showed that while a CLW role may appear to be a good idea on paper, meaningful interpersonal connections cannot be engineered, even when there are shared interests, if the timing and conditions are not right. Ultimately, people need to be given the time and space to find and form their own social community, particularly when moving into a new environment.

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