

Universal Credit

Local Support Services
Update and Trialling Plan

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Ministerial foreword

Universal Credit represents a major cultural transformation. By making sure that work pays, and that the experience of being on benefits more closely matches that of being in work, it enables people to take much more control over their own lives.

This is a significant opportunity, and for many people the change will be a relatively straightforward one. But there will also be people who need support with the transition, and that is why we are working closely with local government to develop the Local Support Services Framework. When it is fully rolled out the Local Support Services Framework will do two vital things.

First, it will ensure people are supported to make the transition to Universal Credit by helping them adjust to some new aspects of the way Universal Credit is designed. So for those who are new to monthly budgeting or to getting online, they will get the help they need to manage that transition process.

Second, it will support the small number of people who find it more difficult to make this transition and will do so over the longer term. This will never be a static process – the aim will always be to move people, sustainably, towards independence – but where people require support over a longer time period the Local Support Services Framework will ensure they get the local, tailored help that they need.

A lot of good work has already been done by local authorities and Jobcentre Plus District Managers since we published the first version of the Local Support Services Framework in February of this year. The Direct Payment Demonstration Projects have been testing the implications of paying Housing Benefit direct to social sector tenants; the Local Authority led Pilots have been testing approaches for supporting claimants to budget and get online, and councils in the Pathfinder areas have been providing support services at a local level.

But there is much more to do as we prepare for the full roll out of Universal Credit. On 5 December we announced our plans for the next stage of implementing Universal Credit. This will see the continued expansion of our current live service and functionality, so that from next summer we progressively start to take new claims for Universal Credit for couples and, in the autumn, for families. Once safely tested we will also expand the roll out to cover more of the North West of England. These steps continue our progressive approach to test, learn, and implement as we deliver this flagship programme, and we will apply that same test, learn and implement approach as we move forward with the development of the Local Support Services Framework.

That is why the publication of the Local Support Services Update and Trialling Plan today is so important. It sets out how we will work together over the course of the next year to test different arrangements for partnership working, financial management, the effective delivery of front line services and other specific aspects of the Local Support Services Framework. It also sets out what local authorities and Jobcentre Plus District Managers can do to prepare, including strengthening existing partnerships and building new ones, identifying resource opportunities and sharing good practice.

We will be publishing another Local Support Services Framework in autumn 2014. Ahead of that I look forward to learning exactly what works in the delivery of local support services for Universal Credit, and to continuing to build the strong and effective partnerships that will be so important to making the Local Support Services Framework a reality.



Lord Freud
Minister for Welfare Reform

Local government introduction

Local Government Association

Since the publication of the Local Support Services Framework in February 2013, local government's role as a key commissioner of support services for Universal Credit has become more significant.

Councils will be central to establishing, leading and commissioning partnerships to deliver support for claimants. Through our work with the voluntary sector and social housing providers, we can already mobilise a diverse base of provision tailored to local claimant's needs. These will deliver the breadth and depth of support needed from the very start.

The Department for Work and Pensions has now helpfully made clear that the partnerships established with local government will last until at least 2020. This provides certainty for local government. Councils now need to continue to show leadership as we have done by establishing the Local Authority led Pilots project. Those pilots have provided invaluable insight. We now need to move the agenda forward again by embracing the testing opportunities outlined within this document. This will provide further opportunities for local government to be at the forefront of the work on support services.

The ideas outlined in this document have been developed through a rewarding and robust partnership between the Department for Work and Pensions and the local government associations. We would like to take this opportunity to acknowledge the hard work undertaken by everyone, including Department for Work and Pensions Ministers, to get us to the current position. We look forward to the next chapter of our work and hope you find this update a useful basis for developing your own services.



Sir Merrick Cockell
Chairman – Local Government Association

Convention of Scottish Local Authorities

Local government has a well defined and established role in addressing poverty, inequality and deprivation delivered through a wide range of services to holistically meet the needs of our communities.

This wider role directly drives local government involvement in the Universal Credit reforms as councils seek to ensure that those in our communities are supported to claim their benefits and that they can make the lifestyle changes necessary to manage the impacts the reforms may have upon them.

We recognise that people and families who are eligible for, and receive benefits, have much to gain from local government and the Department for Work and Pensions Jobcentre Plus working in partnership locally, in the design of our support services. Local government has a long history of helping to support those in our communities to apply for and claim benefit, as well as providing wider support for financial inclusion. While the detail of that role will change radically under Universal Credit the foundations are in place to be built upon for the benefit of our communities.

This developing approach will require both spheres of government to respect each other's roles and views and through partnership working to be flexible and responsive to local needs and demand as the Universal Credit programme is rolled out. In Scotland we are well placed to do this alongside our wider local partners, including the Third Sector, through Community Planning Partnerships.

Co-operating over the development of the Framework for local support services sets the tone for how partnerships should work locally, as does the commitment to a Scottish Overarching Partnership Agreement which includes the Scottish Government as a partner.

Local authorities will, however, still have to make their own independent decisions about whether or not to participate locally in these partnerships. In this context, the ongoing commitment by the UK government to the partnership approach with local government until at least 2020, provides an important degree of certainty and stability for those local authorities who enter into the local partnerships.

There are still details to be jointly agreed around the funding package, the funding model and the content of the Overarching Partnership Agreements but we welcome the approach being taken by the Department for Work and Pensions which recognises local government and the Convention of Scottish Local Authorities as an equal partner in this process.

COSLA will continue to work with the Department for Work and Pensions to develop the detail of the final Framework, but in the meantime we welcome this update on the direction of travel.



David O'Neill
President - Convention of Scottish Local Authorities

Welsh Local Government Association

Local government in Wales is committed to delivering its social justice and anti-poverty agenda to address inequality and deprivation in our communities.

This is being done through a wide range of services that provide a whole system approach to the needs of our communities. We already have a successful track record in working together and in partnership with the Department for Work and Pensions in supporting people who need access to the welfare safety net aided by local authorities' proximity to the communities they serve. This should continue with the introduction of Universal Credit.

Existing local support services that are delivered in partnership with the Third Sector and other local public partners align well with the overarching objectives of the Local Support Services Framework and families and individuals claiming benefits in the future will be better served by additional support through digital and financial inclusion. Local government will engage with the Department for Work and Pensions and the Universal Credit agenda to ensure individuals can navigate the changes ahead with confidence and certainty. We are also committed to considering how we can go further and ensure that new services are fully integrated with current services in a way that improves outcomes for people. We will continue to work with the Department for Work and Pensions to develop an appropriate funding model.

This Update and Trialling Plan sets out what has been achieved collaboratively since the publication of the Local Support Services Framework in February. It further sets out where ongoing partnership working needs to continue to develop to deliver a service that will be responsive to the needs of individuals and families.

We are encouraged by UK government's commitment to local government as a key partner in the delivery of the Local Support Service until at least 2020. Local government and the Welsh Local Government Association are committed to continued partnership working with the Department for Work and Pensions, both centrally and locally, to further influence the shape of local service delivery.



David Phillips
Welsh Local Government Association spokesperson for Anti-Poverty and Welfare Reform

Section 1: Overview and purpose

The Universal Credit (UC) Local Support Services Update and Trialling Plan has been developed by Department for Work and Pensions (DWP), in collaboration with local government colleagues. It responds to the need to refocus the local support services work following the announcements in July and December which set out the next stages of the roll out of UC.

These will involve the gradual expansion of the live service and functionality. Progressive national rollout of Universal Credit to an additional 6 sites began in October 2013 and will be completed by Spring 2014, making the delivery of Universal Credit live in 10 locations across England, Scotland and Wales. In the summer of 2014 we will start to include couples, followed by families. Once safely tested in the 10 live sites the roll out will expand to cover more of the North West of England.

This document gives an update on the progress made since publication of the Local Support Services Framework (LSSF) in February 2013¹ and captures the lessons learned from the Local Authority (LA) led Pilots^{2,3}, the Direct Payment Demonstration Projects (DPDPs)⁴, and Pathfinder; feedback from the Social Security Advisory Committee (SSAC)⁵, and the responses received to the LSSF⁶.

Working with local government colleagues we have agreed that where we have made sufficient progress to assess some aspects of the LSSF we should take the opportunity to do so. This publication details early plans for the trialling of LSSF principles and processes in the Pathfinder; the new live UC areas from October 2013 during the next stages of the progressive national UC roll out; the LA led Pilot areas and new volunteer sites nationwide.

Councils and DWP Jobcentre Plus (JCP) District Managers are encouraged to take the opportunity to start preparing for the introduction of UC in

their local area. If the following steps are not already in place, we believe there is mutual value in:

- Beginning to work together and start creating effective working partnerships;
- Taking the opportunity to begin early planning activity in their areas, for example by jointly mapping services to establish the level of support that may be required by claimants, in particular for claimants with complex needs (see Section 5); and
- Starting to think about how these services can be delivered to achieve better outcomes for claimants to equip them for the future, and to give improved value for money for the taxpayer.

A compilation of examples of current good practice and lessons learned can be found at Annex A.

The results of this trialling activity will enable early evaluation of local support services principles and inform future Framework development. Section 8 gives interested parties more detail on what they can be doing now to prepare for the introduction of UC.

Looking ahead, our joint aim is to produce an updated Local Support Services Framework in autumn 2014, following continued consultation, dialogue and joint working, that will provide further information to allow local partnerships to plan their services for the 2015-16 financial year and beyond.

1. www.gov.uk/government/publications/universal-credit-local-support-services-framework.
2. <https://www.gov.uk/government/publications/local-authority-led-pilots-a-summary-of-early-learning-from-the-pilots>.
3. http://www.local.gov.uk/publications/-/journal_content/56/10180/4050723/PUBLICATION.
4. <http://www.shu.ac.uk/research/cresr/sites/shu.ac.uk/files/direct-payments-learning-lessons.pdf>.
5. <http://ssac.independent.gov.uk/pdf/occasional/implementation-uc-claimants.pdf>.
6. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/226191/uc-local-service-support-framework-response.pdf.

Section 2: Local government summary

Background

Councils across Britain already have experience of delivering the types of support services defined in the LSSF. However, to meet the challenges both of the changing benefit landscape and increased demand for support, these services will need to be invested in and developed.

Local government has a successful track record in responding to this type of challenge and in supporting communities' and individuals' changing relationships with the state and its services. This is underpinned by policies, learning opportunities, and the delivery of integrated services designed around local needs. Councils are uniquely placed to commission and provide services in a holistic way, one that reflects both the lives claimants actually lead, and the widely varying local landscape of public, private and voluntary sector provision. They provide an immediate route to a diverse and open provider base and offer the opportunity for considering how these local partnerships can ensure that we collectively maximise the potential of integrated services to continually improve outcomes for people.

Across Britain, LA led Pilots have already begun modelling face-to-face services to UC claimants, including testing radical innovations in the co-location of services, triage and referral. Councils have also worked with local JCP offices in the DPDPs, learning how best to manage the behavioural effects of the UC model of paying housing costs. Notably, councils involved in the Pathfinder have embraced the opportunity this has presented for early learning and collaboration. Councils involved in these initiatives are likely to be well placed to participate in aspects of the trialling described later in this document.

The current plans for progressive UC roll out provide welcome time and space to thoroughly test and evaluate what could be delivered by way of local support services. This document represents an opportunity to consolidate what has been learned, while taking further steps in developing a joined up offer to our communities. Whilst the roll out of UC is progressing in a safe

manner, DWP intends to maintain the level of funding councils need to manage the full administration of Housing Benefit until the end of the 2014-15 financial year. Nevertheless, there is still much to be gained now by continuing to develop local partnerships alongside JCP District Managers across the country.

Update

Since the publication of the first version of the LSSF in February 2013, the British Local Authority Associations (LAAs) have been working closely with DWP to determine and agree appropriate finance and practical implementation models which will support the progressive roll out of UC. As an interim publication this document will not provide that degree of information but does offer the opportunity for ensuring that councils and JCP District Managers have the maximum information on current development activity, where continuing work is being undertaken and where progress has already been made.

The update details how DWP will test a number of assumptions over the next 12-18 months. This will help to inform decisions to be taken as part of the Framework which will be published next year. The trialling prospectus lays out the intention to test the various potential models of partnership working, joint local decision making, financial management and needs assessment (see Annex E). The trialling will also continue to develop understanding of aspects of service delivery such as triage, online access and budgeting support. There will be further consideration of important technical aspects which will underpin the success of this partnership approach, such as how information and data can be shared where it is desirable to do so.

Current Position

Councils will be joint and equal lead partners in determining how JCP and any relevant local government resources are used to support service provision to meet local needs.

The LAAs agree with the principle of trialling as many of the current assumptions as possible, to build the evidence base for future decisions. Although we can build on learning to date, further work is needed because of the limited range of client groups currently being handled and assessed. Until more detailed data is available each of the LAAs and DWP will have to come to an agreement around what constitutes a reasonable funding package, and an appropriate funding mechanism and distribution arrangement. DWP and the LAAs will also continue to take account of emerging research which might inform the costs of delivery of LSSF.

Each of the nations has the option of a bespoke Overarching Partnership Agreement (OPA) with the DWP within which the partnerships will operate. The DWP will test both block and outcome financial models. It will be possible for different financial models to be agreed separately with England, Wales and Scotland.

The scope of service provision under LSSF has also been developed to include:

- Provision of basic advice and information to help someone claim;
- Online access;
- Assisted digital claiming;
- Intermediary support – communication aids and complex needs support;
- Financial inclusion;
- Money advice and budgeting support; and
- Identifying cases to be considered for an Alternative Payment Arrangement (APA).

In addition, many councils alongside JCP District Managers have started to map current local provision which should enable the identification of any service gaps ahead of national roll out. Some councils will see the value in choosing to develop the planning for local support services alongside their local employability provision particularly where councils are already local partners in supporting people towards work readiness. However, this is not a requirement of the LSSF.

Moving forward

The LAAs see great value in continuing to develop a joint approach to meeting the needs of people via the LSSF and are committed to co-producing the next iteration of the full Framework. In order to deliver against this commitment on behalf of local government we will be looking to the UK government to provide reassurance and information in a number of key areas:

- Future progressive roll out of UC;
- The overall funding allocation to support LSSF;
- The appropriate delivery arrangements in each of the nations;
- Legal protocols for information sharing; and
- Increased flexibility to deliver services based on needs identified as a priority by the local partnerships.

Clearly this document includes some ambitious assumptions around the level of baseline services already available and expected into the future. However we have welcomed the commitment to continue previous arrangements for Housing Benefit (HB) subsidy for 2014-15.

Local government see the local support services agenda as the basis for a long term investment in a partnership approach. This will support people claiming benefit and managing increased responsibilities towards independence as well as providing support for those people with additional or complex needs who will continue to require access to local support on an ongoing basis. As such we very much welcome the UK government's commitment to local government as the lead partner until at least 2020. This commitment should give councils the confidence to plan strategically into the future alongside JCP District Managers, thereby maximising our joint efficiency and improving outcomes for people.

Section 3: Context and background

LSSF aims and objectives

The LSSF, published in February 2013, provides a structure for planning holistic and integrated localised claimant support for people who need extra help to make or maintain a claim for UC to support their journey towards self-sufficiency and independence. It is a tool to leverage DWP, local government and partner organisations' resources to improve value for money and achieve better outcomes, through effective partnership working. It allows for targeted solutions to meet the needs of individuals and different nations and regions in Great Britain.

It acknowledges that UC will be digital, but recognises that telephony and face to face services will continue to be available for people who really need them.

The LSSF sets out a high level approach to building local partnerships and to providing funding to cover the incremental costs of supporting the transition to UC, and those with longer term needs, to access benefit. It also sets out the incentives for working together, to help claimants move towards self-sufficiency and independence. We expect partnerships, comprising of JCP and council managers as key delivery partners and a community of local providers, including social landlords and Voluntary and Community Sector Organisations (VCS), to plan and then implement this support. Annex B shows an example of a single claimant journey for a claimant with drug/alcohol issues. It demonstrates the kind of joint working arrangements that are desirable when handling claimants with complex needs that we are trying to achieve.

The term 'single claimant journey' does not mean that all claimants with complex needs are expected to have the same journey from welfare dependency towards independence and work. We recognise the need for claimants to be supported in a manner that is tailored to their individual needs and circumstances. The journey is 'single' in that it is joined up between the different support agencies working with a claimant, rather than each support agency having their own plans for the claimant and working in isolation.

Councils will have the opportunity to take on a lead provider/partner role with JCP in supporting claimants to increase their capability and become independent and socially included.

As stated in the LSSF, the Government's longer term vision is that of a more open delivery model which, it is hoped, will build on local government's expertise and networks to involve a wider community of local providers, where this is not already happening. This approach, which is still at this stage aspirational, will require further cross-government collaboration and alignment of common resources and services for the mutual benefit of partners. It may require additional national and/or local service provision, for example, a range of money advice products and services and budgeting tools which are available nationally as well as locally. We look forward to working with local government to determine how any national provision can be used appropriately in the LSSF context.

The local government sector should be assured that DWP intends to continue working with councils as key delivery partners until at least 2020.

The LSSF recognises differing approaches to partnership working in devolved nations. In Wales, Local Service Boards (LSB) are multi-agency partnerships led by the LA to integrate the planning of services, particularly for people with additional or complex needs. The LSBs undertake a strategic needs assessment as part of developing a single integrated plan. The LSS Delivery Partnerships Approach in Wales should be established at a strategic level through the relevant LSBs to ensure that this is joined up with existing partnership arrangements. There will be an OPA between DWP and Welsh Local Government Association (WLGA) reflecting this.

In Scotland, there will be an OPA between Convention of Scottish Local Authorities (COSLA), Scottish Government and the DWP, favouring the Community Planning Partnerships (CPP) as the multi-agency setting for agreeing the Delivery Partnership Agreements (DPA). Work is underway to finalise the details of this approach.

The LSSF recognises the role that social landlords and VCS organisations have in supporting benefit claimants, and wants to ensure that these services continue and where needed, increase. It is envisaged that these organisations will be part of local delivery partnerships (see **Annex C**).

Section 4: LSSF learning and trialling opportunities

What are we going to trial?

Since publication of the LSSF, a task force made up of DWP officials and LAA colleagues has been working together to develop the LSSF. This has been supported by advice from individual councils, housing and voluntary sector representatives, other government departments, the Scottish and Welsh governments, and DWP analytical, operational and financial specialists.

The task force has agreed that there is value in carrying out a programme of trialling, in selected areas, of some of the following elements of the LSSF:

- **Partnership working:**
 - Trialling planning and organisation;
 - Managing funding at partnership level;
 - Assessing local population needs; and
 - Delivering services through the partnerships approach.
- **Partnership agreements:**
 - Delivery Partnership Agreements
- **Financial management:**
 - Assessing the impact of LSSF for claimants and on the local area (value for money); and
 - Structure of the financial model including trialling of outcome and non-outcome based elements.
- **Effective delivery of front line services:**
 - Making sure claimants get the right support for them;
 - Arrangements for online access and digital support,
 - Personal Budgeting Support i.e. provision of money advice to claimants and consideration of the need for alternative payment arrangements; and
 - Joined up and holistic support for claimants with the most complex needs.
- **Other specific aspects:**
 - Work readiness; and
 - Applicability of the European Social Fund⁷ (see also Section 6).

Annex D gives further details and suggestions for how each of the testing components described above could be developed.

Where will we do the trialling?

Some areas of service are more ready to trial than others. In the original 4 Pathfinder areas JCP District Managers already have partnerships in place with their respective councils to deliver some support services. They are currently testing approaches for providing digital advice, money advice, and budgeting support with councils and the voluntary sector that are used to providing access to welfare services and this learning will roll out to the additional 6 sites that will start delivering UC between October 2013 and Spring 2014.

12 **LA led Pilots**⁸ are trialling activity around a number of core themes and we propose to continue to work with the pilots where appropriate, to trial elements of LSSF, after the completion of the current pilot programme in December 2013.

In preparation for this, LA Pilot leads have devised a set of key questions and answers that can be shared with other councils and JCP District Managers to help them prepare their organisations, staff and claimants for the implementation of UC.

The first iteration of this work is now complete and focuses on the four key themes of: financial inclusion, digital competence, partnership working and triage. It provides local councils and JCP District Managers with an excellent framework to review the work they have already commenced in building partnerships. A copy can be accessed at www.gov.uk/government/publications/universal-credit-guidance-for-local-authorities-on-implementation. A further update of the document is due to be released in the new year and we will continue to share findings and best practice from this work.

7. Applicable to England only; the Scottish and Welsh Governments are responsible for European Social Fund resources in their areas.

Other aspects of the LSSF, like achieving joined up support for claimants with complex needs, will require a diverse mix of UC claimants, including significant numbers with multiple needs, and so may have to wait until later in the roll out of UC to be tested properly.

Trialling services for UC claimants will initially be confined to early testing of simple claims in the 4 Pathfinder areas⁹ and in the 6 JCP areas in England, Wales and Scotland¹⁰ going live as part of the start of progressive national roll out of UC between October 2013 and March 2014. Plans announced this week will see the expansion of the live service to include couples, families and a wider geographic area, which will provide further opportunity for testing in a live environment.

There will also be opportunities for ‘shadow testing’ aspects of the LSSF in these and other sites that have not yet had a UC service introduced. This refers to trialling good practice for working in partnership to implement key LSSF principles even before UC is rolled out.

Some councils and JCP managers are already taking the initiative and adopting and testing LSSF principles with claimants in preparation for full UC roll out. We believe there is significant value in councils working with JCP in doing this and we are keen to offer supporting advice and guidance to enable these initiatives. Some examples of good practice are detailed at Annex A.

Annex E shows a suggested trialling prospectus for how we propose to work with partners to develop tools to support the roll out of the LSSF going forward.

8. 12 LA-led pilots operating in 13 separate authorities are involved in delivering core pilot activity. These are: Lewisham London Borough Council; Bath and North East Somerset Council; Oxford City Council; Birmingham City Council; Caerphilly County Borough Council; Newport City Council; Dumfries and Galloway Council; North Lanarkshire Council; West Dunbartonshire Council; Rushcliffe Borough Council; Melton Borough Council; West Lindsey District Council; and North Dorset District Council. Two additional authorities (Oldham Council and Wigan Council) are also running similar Pathfinder Preparation pilots.

9. Ashton-under-Lyne, Wigan, Warrington, Oldham.

10. Hammersmith, Rugby, Inverness, Harrogate, Bath, Shotton.

Section 5: Establishing the level of support required for UC

There will be a need to work together to map out and establish the level and type of support services that will be required to support claimants in making and maintaining a claim to UC.

This will be led by JCP District Managers and local government colleagues, in collaboration with other partners. Completing this work in advance of UC rolling out will help to prepare the ground for the delivery of UC and across the country there are some excellent examples of how this activity is being undertaken.

One such example is in the London Boroughs of Lambeth, Lewisham and Southwark who have used a new LSSF mapping tool to identify which services are in place now; which services will need to be in place when UC is rolled out; who provides those services currently and who may provide them going forward; what gaps exist; what the current costs for those services are; how current services are funded and where the money comes from; and what the demand for local support services is likely to be when UC is rolled out. Further information on the advantages of taking such an approach in advance of further UC roll out is covered in Annex F.

This mapping tool offers a wide range of broad service descriptions (see Annex G) that will be required to support the delivery of UC so that claims can be made and maintained on line where appropriate, and will be made available in due course.

It would be advisable for JCP District Managers and councils to jointly progress this mapping exercise as soon as possible in areas where this is not already taking place.

There are a number of other useful data sources that can be used to help colleagues better understand the local position. For example, the link below will take colleagues directly to the latest Housing Benefit caseload statistics.
<https://sw.stat-xplore.dwp.gov.uk/webapi/jsf/tableView/crosstabTableView.xhtml>

Examples of the type of information that can be found by accessing the link above are shown below:

This link shows the on/off flows for all LAs from 2008 to May 2013.

<https://www.gov.uk/government/publications/experimental-housing-benefit-and-council-tax-benefit-flows-data-november-2008-to-present>

This second link shows where the most recent published caseload statistics can be found:

<https://www.gov.uk/government/collections/housing-benefit-and-council-tax-benefit-caseload-statistics--2>

Section 6: Funding local support services

LSSF has been developed to enable a more holistic and joined up service for claimants at a local level, which builds on the support already provided by DWP, councils and other partners, such as housing providers, charities and social care services.

In addition to providing better outcomes for claimants the service should allow for the more effective deployment of resources by central and local government and avoid duplication of costs.

LSSF specific funding

The LSSF recognised that new funding would be required to reflect the additional support provided to some claimants who need assistance to access welfare and who need help to get online and manage their household finances. DWP and LAAs continue to work together to determine the level of funding that will be required. The local support services which are established within Pathfinder locations and the additional 6 progressive rollout sites will further inform our understanding of future costs of the service. We will be looking to ensure that services provided by all partners are costed on an activity by activity basis. This will support in demonstrating the value for money that a local support service represents for the taxpayer. We will trial approaches to capturing the costs of supporting the claimants whilst ensuring that the data gathering burdens on front line staff are kept to a minimum. Further details about the financial management approach can be found in **Annex D**.

Other funding streams

LSSF funding will only be available for services newly required or experiencing an increase in workload as a direct consequence of UC. Some organisations involved in delivering services will not receive LSSF funding but will benefit from a more joined up approach. For example, in England, the Probation Service is already funded to support prison leavers in accessing the benefits system.

Many other services that could add value to the partnerships will also already have funding streams in place, and for many, changes to the delivery of benefits will not be their core business

but will be an important aspect of providing a rounded service to the people that they support. The LSSF approach offers the potential to leverage existing services and resources and is not entirely dependent on new money.

In mapping out current local services provision it has also been possible to identify existing funding streams which might be aligned to ensure added value to all partners. This includes where local support services are currently provided but also other complementary provision such as digital inclusion in local government or the ongoing commitment to digital development in JCP. Aligning our priorities, as well as the underlying budgets where possible, should deliver better joint working, better outcomes and in some cases also better value for money.

The table on the following page gives an illustration of services that are likely to be required to support UC, and an indication of likely or possible sources of funding¹¹ for each one. It is based on some initial work with a number of boroughs to look at what services are already in place, and what will be needed. This may involve developing new services, or expanding or enhancing existing ones. We expect some change will be needed to cope with additional demand, or a new emphasis in the scope and range of support.

Although it uses real data from the areas included, the table is only an example and not intended to be prescriptive or comprehensive. We hope it will provide some useful pointers to help local partnerships manage resources effectively, and identify and maximise available funding.

We would be interested to hear from partnerships that may have new and / or innovative ideas for optimising existing funding streams to deliver UC services.

11. List of funding sources is not exhaustive – there may be other sources of funding that partnerships could potentially utilise to develop or enhance their service offer.

Illustrative example to show the likely service elements required to support UC claimants and current sources of funding¹²

| Service Line | Provision of basic advice and information to help someone claim | | | Digital Access | | Intermediary Support | | Financial Inclusion | | | | Personal Budgeting Support | |
|------------------|---|------------------------|-------------------------------|----------------|---------------------------|----------------------|-----------------------|---------------------|--------------------|--------------|--------------------------------|----------------------------|---------------------|
| | Provision of basic information | Triage and orientation | Welfare Rights Advice Support | Online Access | Assisted digital claiming | Accessibility aids | Complex needs support | Banking support | Financial products | Money advice | Identifying Exception payments | Identifying APA cases | Exception referrals |
| DWP Funding | ✓ | ✓ | ✓ | ✓ | ✓ | | ✓ | | | | | | |
| LA Funding | ✓ | ✓ | ✓ | ✓ | | ✓ | | | | ✓ | ✓ | | ✓ |
| External Funding | | | | | | | | ✓ | | | | | |
| Pilot Funding | ✓ | ✓ | ✓ | | | | ✓ | ✓ | ✓ | ✓ | | | |
| Other | | | | | | | | | ✓ | | | | |

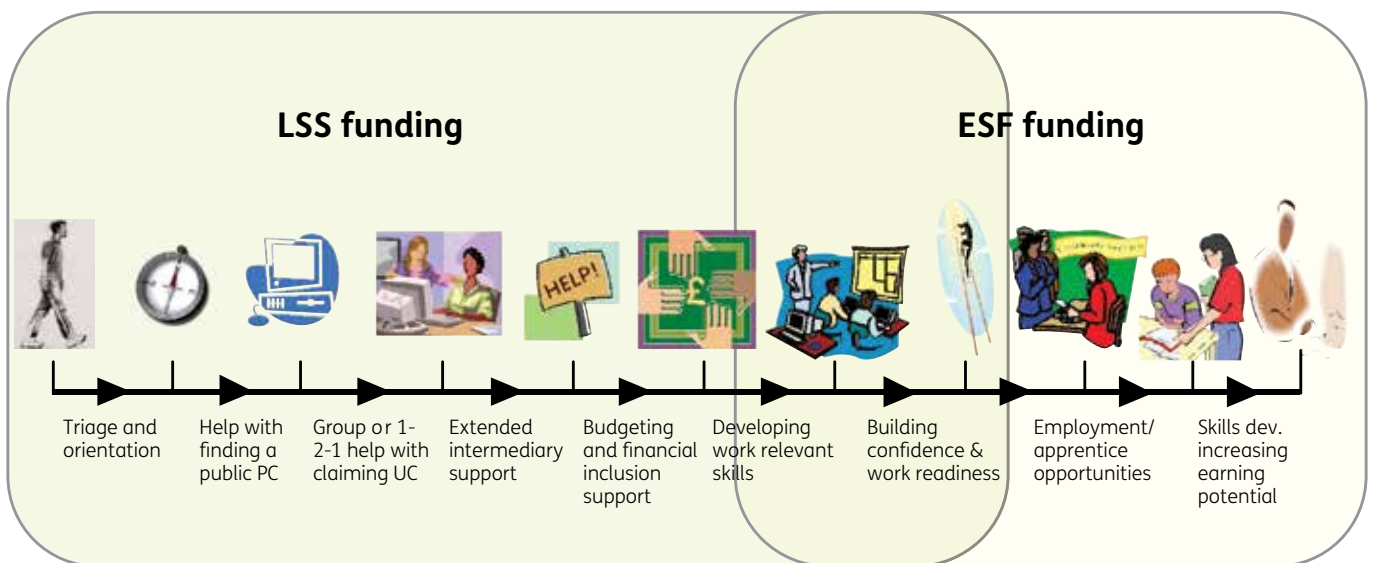
12. Other sources of funding - **Housing Revenue Account**, used to fund the housing stock and complex needs accommodation support, and **Discretionary Housing Payments** and **local welfare provision**, which provide financial assistance for claimants - are part of the pattern of support that LAs can provide to claimants who need additional help. 15

LSSF and the European Social Fund for English LAs

For 2014–2020 the Government has decided that for England, Local Enterprise Partnerships will develop strategies for accessing European Union (EU) structural and investment funds. These include the European Social Fund (ESF) which will focus on employment skills and social inclusion. The Scottish and Welsh Governments are responsible for ESF funding in their areas. We believe that there are areas where the LSSF and the priorities for the ESF overlap. This provides a potential opportunity for LSSF local partnerships to access ESF funding to support elements of the claimant journey.

Currently, Local Employment Partnerships are developing their strategies and developing their operational programmes for the ESF. It is, therefore, important that local partnerships are talking to their Local Employment Partnerships about the LSSF and the sorts of services that will be provided and where opportunities to access funding might exist. Local Employment Partnerships are also being encouraged to work with their JCP Districts and councils.

In order to further support this we are currently working with local government to progress a bid for ESF funding under the current programme ending in 2015 that can act as an exemplar for local partnership working.



Section 7: Information sharing

We anticipate that JCP District and Partnership Managers will work with councils and other local agencies, like Housing and the VCS organisations, to plan and implement a holistic and joined up approach to supporting all claimants, including those with complex needs who currently receive support from multiple agencies.

Where possible we would like partnerships to work towards the principle of a single claimant journey for these claimants, shared between the different agencies so that everyone involved in supporting the claimant is working to the same plan for helping that person to make and manage a UC claim and then to move towards greater independence and, wherever appropriate, work readiness.

DWP staff, local government and other partners will need to be able to share individual and collective data (to the extent it is relevant to each party's role or service they provide) to enable meaningful strategic planning which is responsive to changes over time. They may need to be able to discuss claims in sufficient detail to allow for, for example, exchanges of information and 'warm handovers' as envisaged by the LSSF approach.

There is already some provision within legislation intended to facilitate information sharing between DWP and local government under certain circumstances. This does not cover all possible scenarios and, additionally, we recognise the need to respect a claimant's right to privacy. Therefore, for the purposes of trialling, we intend to share information by way of claimant consent. This will require prior discussion with the claimant to make sure that they know who will be able to receive information about their case and how the information will be used. In the case of sensitive personal data, we will seek explicit, prior informed consent. As part of the trialling, DWP will be testing approaches to information and data sharing between different agencies where relevant to elements of the LSSF trialling menu.

We recognise that data sharing is already taking place in the LA led Pilots and live service areas between DWP and councils. Agreements have been signed in these areas and as individual data controllers each party must satisfy itself that the data is being shared in accordance with the law. In developing their own models for lawful and effective data sharing, LSS partners may find it helpful to refer to the Troubled Families Programme (TFP) local data sharing guidance¹³ published in June 2013. It sets out recommended protocols and good practice for sharing data/information by way of consent. It includes recommended practice around multi-agency case conferencing and references links to the legal guidance on data sharing. It also contains guidance on multi-agency case conferencing memorandum of understanding, and consent forms. Although this guidance was developed specifically for the TFP (an England only programme) and so will not be appropriate for LSSF services in every case, it may provide a useful starting point for partners planning multi-agency services by consent.

In Wales, the Wales Accord on the Sharing of Personal Information (WASPI) provides a framework for service providers to share the personal data they hold about individuals in a lawful and intelligent way and for developing information sharing protocols (ISPs) where these are needed¹⁴.

13. You can obtain a copy by contacting your local Troubled Families Employment Adviser.

14. The WASPI Accord is now signed by all 22 LAs, all 10 health boards and NHS Trusts, all 4 police forces, 3 Fire and Rescue Service as well as some 60 organisations.

Section 8: Looking ahead

Community partnership approach

Community and neighbourhood budgets in England are allowing local redesign of services and the pooling of budgets across organisational boundaries to address local priorities and improve services, particularly in communities with complex needs.

The Government tested out the concept of community budgets by working with 16 areas to help troubled families. The next phase of community budgets will give 4 LA areas and 10 neighbourhood level pilots greater freedom to join up services and budgets. Whole-place pilots will give local public service partners the freedom to redesign services and decentralise control of them, and the funding, to the lowest possible level. This will reduce inequalities in access to good services.

We will explore this approach as we look forward and develop the updated LSSF in autumn 2014.

Preparing for UC, testing LSSF

From the new year, we will be testing key aspects of the LSSF, working with the Pathfinder and additional live service areas and taking advantage of the gradual expansion of claimant types and locations, to look at:

- Effectiveness of partnership working, based on local needs and focused on supporting claimants to access all services independently and to become more work ready;
- Some of the funding models that will be required to support the partnership; and
- Effective delivery of front line services that provide simplicity for customers and drive organisational efficiency.

We will also be working with pilot councils and other councils and JCP Districts that have chosen to implement the LSSF approach ahead of wider roll out to develop best practice to support others.

We are encouraging all JCP District Managers and councils to continue to forge links and establish local partnerships to test and develop recommendations around

best practice for key elements of the LSSF offering, for example, triage, digital support, financial advice and guidance, case management of complex needs and alignment with DWP's Work Services in the same way that the pilots will be doing as they carry out shadow testing.

We are also continuing to promote local mapping and gap analysis of services available to support UC claimants in preparation for UC roll out as well as closer working between organisations. To prepare for the introduction of LSSF, organisations may wish to consider:

- Mapping out and reviewing relevant services and support provided to clients from welfare dependency towards independence and, wherever possible, into work;
- Engaging with appropriate umbrella organisations and representative bodies, to develop a wider understanding and identify emerging issues; and
- Increasing engagement with others who support claimants with complex needs locally.

With this in mind we would be very interested to hear from partnerships that would like to express an interest in formally trialling the LSSF approach ahead of wider UC roll out.

We would like to hear what plans they have to bring the LSSF to life in their area and which elements of the prospectus they think would be suitable for trialling in their location. We would encourage DWP and LAs to share their plans or ideas with each other, and to start to discuss the potential for delivery of LSSF services at individual local level.

There will be an opportunity to learn more, share ideas and discuss joint proposals for the trialling of LSSF at a series of DWP and local government LSSF 'roadshows' planned to take place early next year in England, Scotland and Wales. Invitations and further details will be communicated shortly.

Glossary of terms

| | |
|--|---|
| Alternative Payment Arrangements (Part of PBS) | Alternative Payment Arrangements (APA) will help claimants who genuinely cannot manage the standard monthly payment and where there is a risk of financial harm to the claimant or their family. This might include rent paid directly to the landlord, a more frequent than monthly payment, or a split payment between partners. |
| Claimant Need | Specific claimant characteristics that indicate a need for interacting with UC in a certain way and/or with certain support in order to do so successfully. |
| Conditionality | The claimant must fulfil certain requirements to receive benefit. Under UC there will be four types of work related requirements: <ul style="list-style-type: none"> • work-focused interview • work preparation • work search • work availability Requirements will be tailored where appropriate to reflect a claimant's circumstances and capability. |
| Complex Needs | Claimant with a need which requires detailed and ongoing support and which cannot be resolved by one specific transaction or contact. |
| Delivery Partners | Providers of localised services who will work in collaboration with DWP and other relevant stakeholders and will have sufficient capacity, capability and flexibility to provide support and meet local claimant need. |
| Delivery Partnership Agreement | A local agreement between DWP and the council (or group of councils) for the delivery and management of services necessary for the effective delivery of UC. |
| Financial Inclusion | Financial inclusion means having access to an appropriate range of financial products and services which allows claimants to effectively manage their money regardless of their level of income or social status. |
| Money Advice (Part of PBS) | Money advice will help those claiming UC learn to cope with managing their money on a monthly basis and paying their bills, including rent, on time. |
| Personal Budgeting Support (PBS) | PBS will help claimants with the key financial changes that UC brings: <ul style="list-style-type: none"> • a standard household payment; • paid monthly; and • with housing costs paid directly to the claimant |
| Shadow Test | Testing good practice for working in partnership to implement key LSSF principles, even before UC is rolled out. |
| Single Claimant Journey | Local arrangements for progressing individual claimants with complex needs towards independence, self-sufficiency and (wherever possible) work readiness. All service providers should be aligned to this, ensuring that claimant support feels holistic and joined up and that claimants are not given conflicting messages or instructions by different agencies. |
| Social Justice | Social Justice is a government approach to tackling all forms of poverty through: <ul style="list-style-type: none"> • Prevention and early intervention; • Recovery and independence, rather than maintenance; • Promoting work as the most sustainable route out of poverty; • Supporting those who are severely disabled and cannot work; • Designing and delivering effective solutions at local level; and • Ensuring all interventions provide a fair deal for the taxpayer. |
| Diagnosis | The process of assessing a claimant's needs at the initial point of contact and to identify appropriate support. |
| Triage | The process of ensuring that claimants are given the appropriate level of support to make and manage a UC claim, according to their needs. |
| Work Services Support | The range of assistance and interventions available to maintain claimant commitment and conditionality. |

Annex A: Good Practice and Lessons Learned¹⁵

The selection of good practice and lessons learned that follow have been collated from a variety of sources. Where the source is a published report, the reference is annotated to allow the reader to access the report via the links below and learn more.

1. Local Government Association, Local Government and UC, June 2013
http://www.local.gov.uk/publications/-/journal_content/56/10180/4050723/PUBLICATION
2. Department for Work and Pensions, 'LA Led Pilots: A summary of early learning from the pilots,' July 2013
<https://www.gov.uk/government/publications/local-authority-led-pilots-a-summary-of-early-learning-from-the-pilots>
3. Department for Work and Pensions, 'Direct Payments Demonstration Projects: Learning the lessons six months in', May 2013
<http://www.shu.ac.uk/research/cresr/sites/shu.ac.uk/files/direct-payments-learning-lessons.pdf>
4. DWP, An evaluation of the Jobseeker's Allowance Online Digital Trailblazers (One, Two and Three), May 2013
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/199046/ihr15.pdf
5. DWP, An evaluation of the Jobseeker's Allowance Online Digital Trailblazers Phases Two and Three, October 2013
<https://www.gov.uk/government/publications/jobseekers-allowance-online-digital-trailblazers-phases-2-and-3-evaluation>
6. Scottish Government, Monthly benefit payments and types of budgeting support, May 2013,
<http://www.scotland.gov.uk/Resource/0042/00422511.pdf>
7. <http://www.studiolife.org.uk/moneysavvy2/>
8. SCVO welfare reform mapping report, May 2013
<http://www.scvo.org.uk/wp-content/uploads/2013/05/welfare-reform-mapping-report2.pdf>
9. <http://www.turningpointscotland.com/news/announcement-of-funding-for-hmp-low-moss-throughcare-service/>
10. The implementation of UC and the support needs of claimants: a study by the Social Security Advisory Committee, May 2013
<http://ssac.independent.gov.uk/pdf/occasional/implementation-uc-claimants.pdf>

15. Please note: where information has been provided by each of the LAs; findings and basic statistics presented cannot be independently verified by DWP analysts.

Good Practice and Lessons Learned - Triage

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|---|--|--|-------------------|
| <p>Lewisham London Borough Council</p> | <p>Created an effective process for identifying additional support needs:</p> <ul style="list-style-type: none"> • Customer letter explaining key welfare changes and estimate of financial loss from the benefit cap • Customer contacted for triage assessment (by phone) focussing on skills/experience across financial, digital, housing and employment spheres. The script built into the Customer Relationship Manager (CRM) system assigns scores to the answers given which then determines if the customer is considered 'vulnerable', triggering the need for a further support appointment if appropriate • Face-to-face appointment conducted with individual level calculation • Individualised support plan created, warm referrals to key agencies responsible for providing ongoing support tailored to the individual needs identified | <ul style="list-style-type: none"> • Early learning suggests that, while some claimants will be able to make the transition to UC based on their support plans, others will require more prolonged support • Another step is being added to the model that would offer additional support to residents that require more intensive support. Lewisham Borough Council is working with the Behavioural Insights Team from the Cabinet Office to develop a case management approach which will see the team offering some customers more on-going support | <p>1</p> |
| <p>Tameside Metropolitan Borough Council</p> | <ul style="list-style-type: none"> • As part of a joint Greater Manchester initiative a Benefits Bus visits various towns to promote benefits advice • The bus has attended specific Pathfinder postcode areas and more visits are planned | <ul style="list-style-type: none"> • The bus means that advice on benefits has the potential to reach more isolated or secluded communities, and also that people can access information away from the 'official' or formal surroundings of a JCP office | <p>1</p> |
| <p>Birmingham City Council</p> | <ul style="list-style-type: none"> • Using social housing letting suites to undertake initial customer triage • 90 minute interview conducted with each new tenant to assess housing, employment and financial management needs • Tenants are offered a 12 week support programme to ensure they remain focussed on the conditions of their tenancy and are able to access the help required to maintain their tenancy | <ul style="list-style-type: none"> • Early evidence suggests that this triage process has helped to ensure that customers have received monies to which they are entitled – in excess of £10.4m up to the end of April 2013 | <p>2</p> |
| <p>Caerphilly County Borough Council</p> | <ul style="list-style-type: none"> • Undertaken extensive programme of home visits to actively engage customers in discussion about welfare changes • Information gained during a short survey undertaken during each visit has been invaluable to the council • All households visited receive expenditure reduction advice and, if appropriate, signposting or referral to specialist support (e.g. Citizen's Advice Bureau (CAB) for debt/budgeting advice, JCP for employment support) | <ul style="list-style-type: none"> • Expenditure reduction includes energy and water savings advice and support in applying for services/support, so customers are not only aware of welfare changes but how these will impact on their household finances and steps/action they can take to reduce expenditure and/or seek specialist support if appropriate | <p>2</p> |
| <p>Dundee City Council</p> | <ul style="list-style-type: none"> • Pilot project runs from summer 2013 to March 2014 | <ul style="list-style-type: none"> • The action plan has generated customers into services especially employability | <p>N/A</p> |

Good Practice and Lessons Learned - Triage

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|----------------------|--|--|------------------|
| <p>SSAC</p> | <ul style="list-style-type: none"> Managed and delivered by the Welfare Reform Group in Dundee City Council, led by the Director of Corporate Services with representation from Welfare Rights, Housing, Financial Inclusion, Information Technology, Housing Benefit and Economic Development business areas Customers of Dundee City invited at various access points across the city to consider how they might be impacted by welfare reform. They answer a number of questions which then generates an action plan around some themes, such as employability; information and advice; housing; fuel poverty, etc System generates an automatic referral to relevant services and data on the customer is sent to the appropriate service provider, who follows up in person with the customer. Outcomes are recorded which can then be tracked across all services The data is generated from information already held in a customer database or citizens account generated from council tax data The main aim of the pilot is to enhance and improve the assessment and referral process undertaken by front line staff, allowing agencies quicker access to better information to help resolve clients' presenting problems and progress to their eventual outcome quicker, while avoiding inaccurate assessments By developing a holistic approach to customer care, staff delivering council services will be trained to recognise signs of poverty and deprivation and financial difficulties arising from life events, and will be able to offer easy and speedy access, frequently through direct referrals, to expert advice from council services and partners | <ul style="list-style-type: none"> Significant shift in staff morale and motivation as they see real outcomes Third Sector partner critical in being a trusted provider of advice services and budgeting support Wider benefits of better joined up public services | <p>10</p> |
| | <ul style="list-style-type: none"> The capability of the UC process to identify support needs is essential. The fluctuating nature of vulnerability underlines the importance of taking multiple opportunities to assess claimant support needs at all stages Self sufficiency is recognised as an important aim for all claimants, including those recognised as needing most support, for example those with learning disabilities Important to acknowledge the varying levels of support needed over a range of timescales according to individual claimant need Many claimants are likely to require time-limited support in the short-term, while others may need ongoing support to enable them to manage a UC claim over time | | |

Good Practice and Lessons Learned – Digital Inclusion

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|--|--|---|-------------------|
| <p>LA led pilots</p> | <ul style="list-style-type: none"> • Early findings suggest that there is a low level of awareness that UC will be delivered digitally • Supporting people to get reliably online takes time and there are different kinds of barriers that need to be addressed • Many claimants do not have personal email accounts | <ul style="list-style-type: none"> • To address this lack of awareness, the Local Government Association (LGA) has included a ‘getting ready’ checklist for councils that includes questions such as: <ul style="list-style-type: none"> • How comprehensive is your broadband package? • Have you mapped public internet points? • Do you have digital champions/what level of digital champions exists? | <p>1</p> |
| <p>Northampton CAB</p> | <ul style="list-style-type: none"> • Since 2010 have been offering online training • Found that the number of jobseekers registering was growing has resulted in a shift in the type of online training delivered by the centre, moving from a generalist approach to one which has practical implications for those seeking employment, particularly with the recent introduction of the DWP’s Universal Jobmatch in November 2012 and the lack of specific training for the inexperienced and vulnerable who are required to use it • Claimants are shown how to set up a Universal Jobmatch account and their final task is submitting an application for a job online | <ul style="list-style-type: none"> • Have developed a more practical approach as found that was more successful, e.g. set up email account and use that, practice searching, help them register for Universal Jobmatch and show how to use it, teach how to copy and paste so they can use same text for different job applications | <p>N/A</p> |
| <p>Tameside Metropolitan Borough Council</p> | <ul style="list-style-type: none"> • Worked with DWP to set up a self-service Hub in the main council offices, providing free computers for online access to UC, Housing and Council Tax benefit and other DWP benefits • The Hub supports existing computer access in libraries and Customer Service Centres across the borough • Working with CAB, which is co-located in the main council offices, staff are on hand to provide online support to access applications and the key message is to get online and stay online | <ul style="list-style-type: none"> • Appointed three previously unemployed people to provide support for online activity during Pathfinder and commissioned CAB to provide Personal Budgeting Support (PBS) on our behalf • CAB are contracted to help claimants with online form completion, register with Universal Jobmatch and complete applications for Council Tax Support | <p>1</p> |
| <p>Oxford City Council / Rushcliffe Borough Council</p> | <ul style="list-style-type: none"> • Evidence from a DPPP Tenant Focus Group (Oxford City Council) suggested that tenants were worried about security risks of using public computers such as ones in libraries or council offices | <ul style="list-style-type: none"> • Lessons can be learned from the Rushcliffe Borough Council LA led Pilot where data security on self service terminals is linked to core computing system - this means that customers can't openly browse or access personal emails, but they do need email access to access Universal Jobmatch to find jobs • Other pilots have addressed this with open access • Rushcliffe BC has now enabled customers to access emails through the self-service terminals, however, this has involved implementation of additional security measures that would not have been necessary if the terminals were open access like other sites | <p>1</p> |

Good Practice and Lessons Learned – Digital Inclusion

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|---|---|--|------------------|
| <p>Dumfries and Galloway Council</p> | <p>Establishing internet access - Survey work has been undertaken by LAs to understand what proportion of their customers are able to make online applications, and/or have internet access. They found that there are large groups of service users who have limited access to the internet from home. To address these issues, LAs have taken the following steps:</p> <ul style="list-style-type: none"> • Dumfries and Galloway Council: Authority installing internet access points in customer reception areas of council premises, and also training staff to provide customer assistance in making online claims | | 2 |
| <p>Rushcliffe Borough Council</p> | <ul style="list-style-type: none"> • Rushcliffe Borough Council: Placed a number of internet terminals in their customer contact centres located near front doors for ease of access and visibility • Reception staff at the contact centres are trained to quickly assess the needs of each customer and direct them towards the self-service points | <ul style="list-style-type: none"> • Rushcliffe Borough Council reports the provision of self-service internet terminals at the point of first contact is important in improving customer use of online services • Usage of the self-service terminals for benefit customers has increased to 11% of the 600 or so face-to-face benefit customers who visit every month. 81% of all new housing benefit claims are now completed online either from home or the self-service terminal | |
| <p>Caerphilly County Borough Council</p> | <ul style="list-style-type: none"> • Caerphilly County Borough Council: Mapped internet access points and availability across the borough, and publicised the information through production of detailed leaflets and information boards and the use of a marketing campaign • Installing wi-fi access points in village halls and other community centres to address the lack of broadband coverage in some rural areas • Community digital champions, briefed on both UC and Housing Benefit-related services have been established in three separate villages to help and assist fellow residents access internet services | <ul style="list-style-type: none"> • The marketing campaign by Caerphilly County Borough Council now makes it clear that there are 16 local libraries all offering internet access, ‘Claiming Online’ services and one-to-one digital skills training support | |
| <p>West Lindsey District Council</p> | <ul style="list-style-type: none"> • West Lindsey District Council: Installing wi-fi access points in village halls and other community centres to address the lack of broadband coverage in some rural areas | <ul style="list-style-type: none"> • As a result of the increase in rural broadband coverage in West Lindsey District Council, community digital champions, briefed on both UC and Housing Benefit related services have been established in three separate villages to help fellow residents access internet services | |

Good Practice and Lessons Learned – Digital Inclusion

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|--|--|---|------------------|
| <p>Caerphilly County Borough Council</p> | <p>Improving IT skills - Survey work undertaken by the LAs also showed that a number of their customers lack IT skills or were IT illiterate. To address these issues, LAs have taken the following steps:</p> <ul style="list-style-type: none"> • Caerphilly County Borough Council: Offers ‘Digital Fridays’, open sessions to help people with their IT skills - supported by staff and volunteers from JCP as well as people who want volunteering experience to help with job search | <ul style="list-style-type: none"> • As part of the training process, residents are offered ‘assisted self-service’ of e-Claim and Online Change of Circumstances or other suitable online interaction such as registration with Universal Job Match and an online request for council services. To date (summer 2013), Caerphilly Council estimated that 2,500 residents have been supported in getting online | <p>2</p> |
| <p>Bath and North East Somerset Council</p> | <ul style="list-style-type: none"> • Bath and North East Somerset Council: Is considering an opportunity for customers who are IT savvy to come along to future workshops and help provide peer support to others. In exchange, offering a certificate that can be used on a CV for future job opportunities | | |
| <p>North Dorset District Council</p> | <ul style="list-style-type: none"> • North Dorset District Council identified that a number of people attending job clubs in the district required IT training. As a result a training course has been set up in partnership with Adult Learning Services and claimants are signposted to this provision | <ul style="list-style-type: none"> • To date (summer 2013), 67 people have attended the basic courses set up by North Dorset Council in partnership with the Adult Learning Services, including an introduction to computers, email, word processing and internet access - in addition, a further 20 people have enrolled on the Functional Skills IT programme | |
| <p>West Lindsey District Council</p> | <ul style="list-style-type: none"> • West Lindsey District Council has installed internet enabled computers at its Guildhall offices and, in partnership with JCP staff, support and assistance is offered to customers wishing to access a range of online services, including claim forms and Universal Job Match | <ul style="list-style-type: none"> • West Lindsey District Council monitors the support service and has found that as people continue to use the service their confidence grows; many of those who initially required support are now able to access the services unaided (in March and April 2013, 81% of new customers requested some form of support, while only 44% of repeat customers required assistance¹⁶) | |

16. Survey base 318.

Good Practice and Lessons Learned – Digital Inclusion

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|-------------------------------|---|--|------------------|
| Birmingham City Council | <p>Encouraging the use of online services - LAs have noted that some customer groups are reluctant to use online services, despite efforts being made to encourage increased online engagement. To address this reluctance, LAs have taken the following steps:</p> <ul style="list-style-type: none"> • Birmingham City Council: Introduced digital log book to help social housing tenants to manage payments. Tenants must sign up to digital log book as condition of tenancy | <p>1</p> <ul style="list-style-type: none"> • By summer 2013, Birmingham City Council found that 1,063 tenants had signed up to the digital log book and early feedback was generally positive | |
| Newport City Council | <ul style="list-style-type: none"> • Newport City Council: include a ‘Save time go online’ logo and website address that is added to all paper-based forms to encourage online use | <p>2</p> <ul style="list-style-type: none"> • Newport City Council has seen an increase in the number of online applications due to the ‘Save time go online’ campaign, for example it estimates the number of online applications for the disabled parking Blue Badge has increased to from 15% to 30% in the three months following its launch | |
| Rushcliffe Borough Council | <ul style="list-style-type: none"> • Rushcliffe Borough Council: Installed 2 self-serve terminals at the Rushcliffe Community Contact Centre, with clear signage to encourage the use and development of a dedicated user friendly website www.rushcliffe.gov.uk/selfserve with access to a variety of partner websites, including job search sites • Offered a call back service to customers to complete an initial calculation online over the phone and a follow-up appointment instead of issuing paper forms (paper forms removed from website) • Assistance and support to use the kiosks available to customers who need help or lack confidence • Identifying reasons why customers are not applying online and offering support to those individuals • Also promote online services through their ‘don’t stand in line, do it online’ campaign | | |
| Dumfries and Galloway Council | <ul style="list-style-type: none"> • Dumfries and Galloway Council: Are also undertaking further analysis to understand what specific barriers customers face in using online services by undertaking a survey of customers who have made paper-based claims - the council hopes that this research will provide insight into what barriers exist and what policy changes can be made to boost online engagement | | |

Good Practice and Lessons Learned – Digital Inclusion

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|--|---|--|------------------|
| <p>Digital Deal projects across the UK¹⁷</p> | <p>Digital Deal projects are testing a variety of ways of helping social housing tenants get on line including:</p> <ul style="list-style-type: none"> • Installing free wi-fi in tenant blocks • Mobile Buses with wi-fi and support in rural areas • Refurbished, affordable computers with equipment loans some through credit unions • Home based one-to-one support • Digital TV channel | <p>Digital Deal Project runs to May 2014, and will be evaluated on:</p> <ul style="list-style-type: none"> • Value for money e.g. significant proportion of the residents involved will be positively affected by the proposed work • Motivation, Skills & Capability e.g. A significant proportion of the residents involved will build their digital skills and capability to use online service • Impact e.g. range of positive social outcomes will be achieved through the proposed digital development work like a measured increase in acceptance of how technology and digital engagement can significantly enhance the quality of life • Feasibility e.g. deliver on its ambition within the budget and timescales • Sustainability e.g. project can carry on beyond the life of the funding | <p>N/A</p> |
| <p>JCP Trailblazers¹⁸</p> | <p>Trailblazers implemented in 3 separate districts on 25 May 2012 and ran for 12 weeks:</p> <ul style="list-style-type: none"> • Trailblazer One – Tested the impact of staff re-directing and persuading callers to claim online instead, providing support where necessary • Trailblazer Two – Tested the impact of an additional 5 (and later 10) minutes’ wait time on the telephone claim line • Trailblazer Three – Tested the impact of providing an incentive for online claims by promising to prioritise the processing of online claims | <ul style="list-style-type: none"> • Persuading callers to claim online and informing them where they can access the internet was more successful than increasing waiting times or promising to prioritise online claim processing • The effects are likely to be lasting – at least some claimants will claim online again next time • The opportunity to claim online was generally regarded positively although staff and claimants felt there should be a choice in how to make a claim • Online claimants generally had a good experience of using JSA Online, and valued its flexibility and convenience. Some who experienced problems that prevented them from claiming online said they would try again in future • Some claimants would be willing to make a claim online next time with support. The introduction of Internet Access Devices in JCPs has provided claimants with access to the Internet and, where appropriate, support from staff | <p>4</p> |

17. South East (Ealing; Westminster; Salisbury; Staines); Bron Afon (Cwmbran); Camden Council; Cottsway (Oxford); Fabrick (Middlesbrough); Golden Gate (Warrington); Leeds Federated Housing Association; Magenta Living (Wirral); Progress Housing (Leyland, Lytham South Ribble); Queens Cross (Glasgow); South Essex Homes (Southend); Yarrington Housing (Somerset).

18. South East Wales, Birmingham and Solihull, and Merseyside.

Good Practice and Lessons Learned – Digital Inclusion

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|--------------------------------|--|--|------------------|
| JCP Trailblazers ¹⁹ | <p>Trailblazers Four, Five and Six were launched from August 2012 and Trailblazers Seven and Eight in February 2013:</p> <ul style="list-style-type: none"> • Trailblazer Four – focused on encouraging Rapid Reclaim claimants to claim online • Trailblazer Five - removed the option to make a telephony claim at first contact by providing a call back appointment three days after the initial contact • Trailblazer Six - removed the option to make a telephony claim to any claimant who is eligible and able to use the JSA Online service Claimants without internet access were directed to a suitable access point at a third party provider or JCP Internet Access Device (IAD) • Trailblazer Seven - tested the combination of Trailblazers Five and Six • Trailblazer Eight - was a variant of Trailblazer Six where the determination of a claimant's eligibility to claim online took place during the dialogue with contact centre agents, rather than during the Interactive Voice Response part of the call | <ul style="list-style-type: none"> • Trailblazers Six and Eight have shown that it is possible to strongly direct claimants to the online service, as long as this is combined with support for those without access to the internet and/or the skills to use it • Directing claimants who were eligible and capable of using the JSA Online service, and providing support for those with limited access to the internet and/or poor IT skills meant the increase in online take-up was achieved without a significant increase in complaints from claimants • Contact centre staff noted that the changes required a shift in emphasis away from scripted conversations towards greater use of influencing and persuading skills • It is important to ensure web-based services are as usable as possible. Not only because this improves the service for the claimant, but because unclear questions lead to missing information that requires additional contact with the claimants during the processing stage, which increases costs | 5 |

19. Gloucester and the West of England, Bedfordshire and Hertfordshire, South East Wales, Birmingham and Solihull, and Merseyside.

Good Practice and Lessons Learned – Financial Inclusion and Personal Budgeting Support

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|-------------------------------|--|--|------------------|
| West Lindsey District Council | <ul style="list-style-type: none"> • Credit union operates from the Guildhall at Gainsborough on Tuesdays to provide financial products and advice • From July 2013, 20 local government and UC financial inclusion sessions – ‘Money Box’ being held in partnership with a local housing association, credit union, CAB, local solicitors, and housing floating support - initially there were few attendees but this has grown and customers are finding it helpful to be able to see more than one area of support in one visit • Customers will be able to talk confidentially about a range of issues relating to managing their budget | <ul style="list-style-type: none"> • An external organisation chairing the steering group sends a powerful message to partners about their important roles in UC • Customers want to access face-to-face support to help them get online and community digital champions can play a role • Work with the county council to identify county services, such as public libraries and children’s centres, where customers can access the internet | 1 |
| Milton Keynes Council | <ul style="list-style-type: none"> • A number of LAs found that customers reluctant to take part in budgeting and financial training group sessions, possibly due to stigma from revealing personal debt and rent arrears issues. Some sessions cancelled due to low take-up. Finding mirrored in DPPD pilots areas also • Run financial management sessions with trusted and respected local partners, in this case in partnership with a local football club • Sessions well attended by local residents and the council believe their success is partially due to the involvement of the local team | <ul style="list-style-type: none"> • Generally claimants are concerned about their ability to manage monthly direct payments. Some of the pilots have developed online tools to help claimants improve their budgeting skills • One-to-one budgeting support can be more effective than group sessions • Milton Keynes Council claims that residents have a strong affiliation with the team and therefore events supported by the club benefit from a strong positive association • Possible that people feel more able to address difficult or stressful subjects in an environment that they associate with something familiar and comfortable | 1 |
| DPPD | <ul style="list-style-type: none"> • Landlords recognise that new ways of working will be needed to respond effectively to the changed environment and that these will challenge their traditional role - the report recommends that early landlord intervention and an increased emphasis on landlord/tenant relationship building will be key in the future • The Project is putting together a ‘Landlord Best Practice’ based on Direct Payments experience and is developing a better sense of the costs involved in scaling this up for UC • This also includes identifying the issues landlords should consider in preparing themselves for the introduction for UC | <ul style="list-style-type: none"> • Of the 10,000 tenants assessed in preparation for direct payments, over 6,000 were paid by direct payment • Findings from evaluation 6 months in show that full or partial rent was paid by 94% of all the tenants placed onto direct payments but that 20% of those had to be switched back to payments to their landlords • The majority of tenants transferred onto direct payments are managing to pay some or all of their rent despite their concerns or anxieties about their abilities to manage • There is evidence of good money management skills and high levels of financial competence among tenants • Participation in the projects, which includes providing tenant support, has been challenging for landlords but they recognise the need to change how they operate • Bank accounts – more tenants have accounts than expected (80%) although not always active accounts | 2 3 |

Good Practice and Lessons Learned – Financial Inclusion and Budgeting Support

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|-----------------------------------|--|---|------------------|
| <p>DPDP</p> | <ul style="list-style-type: none"> • Most Project Areas initially relied on letters to engage with tenants although all subsequently used various forms of personal communication | <ul style="list-style-type: none"> • From the Baseline Survey, of the tenants on partial HB, 35% paid by cash, 27% paid by rent payment card and only one fifth used automated systems of direct debit and standing order • Although the majority of the landlords on the project preferred direct payment as a payment method, it is important to offer a range of payment methods that are tailored to the tenants needs • Not all claimants have taken up the offer of support or engaged • Some claimants require ongoing support - often difficult to immediately identify underlying issues • Tenants want to feel in control of their income - no one single solution | <p>3</p> |
| <p>Scottish Government</p> | <p>Good practice identified by Scottish Government include:</p> <ul style="list-style-type: none"> • Intervening early before people reach crisis point; providing budgeting advice that is targeted and relevant to individuals • Providing budgeting support that is convenient and local; ensuring that front-line staff are trained in the needs of vulnerable groups • Techniques that can be adopted by benefit claimants to help them develop their own financial capability | <ul style="list-style-type: none"> • Early communication with claimants is essential • Tenants prefer personal contact (face-to-face or telephone) with their landlords • Evidence from one area reported greater success when support was framed in the terms of ‘tenancy support’ than when framed in terms of financial and money advice • Use of broadest range of contact channels achieves the most effective results • Tenants need to understand their responsibility both from the outset and when their personal circumstances change | <p>6</p> |

Good Practice and Lessons Learned – Financial Inclusion and Budgeting Support

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|----------------------|---|---|------------------|
| Southwark Council | <ul style="list-style-type: none"> As a result of growing rent arrears and use of pay lenders, the partnership successfully bid for funding from Big Lottery to establish 'Money Savvy Southwark' - this is a five year project to improve financial inclusion amongst social housing tenants. From autumn 2013 they will be offering group budgeting skills workshops for all new Southwark Council Tenants Six agencies have been sub-contracted to provide services. This was made easier as the 6 are all part of the partnership already | | 7 |
| CAB | <ul style="list-style-type: none"> Running a Financial Skills for Life programme (supported by Prudential) since 2002 to create lasting change in people's skills, and confidence with managing money Bedworth, Rugby and Nuneaton delivered short financial skills training sessions free of charge to tenants of a local Housing Association | <ul style="list-style-type: none"> Independent evaluation showed that those who took part in financial skills training were more likely to improve their financial skills, gain financial confidence and access appropriate financial products 71% of tenant learners reported being far more financially confident as a result of the training, compared to just 13% of the comparison group Tenant learners who changed how they managed their money as a result of the training were, on average, £10 per week better off as a result Tenant learners who changed their saving behaviour saved, on average, an extra £11 per week | N/A |
| Pathfinder | <ul style="list-style-type: none"> Having a forecast of expected PBS volumes enables actual take up to be tracked and any corrective action commissioned For example, this enabled DWP to identify lower than expected take up of PBS in the Pathfinder An end to end process review was conducted into reasons for this, focussing on: <ul style="list-style-type: none"> The process itself and supporting filter questions Job roles and how PBS is delivered Guidance and Knowledge Management Training Material and Delivery Culture and Behaviours | <ul style="list-style-type: none"> Improvement activity identified from the review is being considered Formal evaluation in Pathfinder will also continue to dig deeper into the issues as volumes pick up via: <ul style="list-style-type: none"> a claimant survey on attitudes, behaviour, outcomes work with local partners to assess their experience of budgeting support and advice in Pathfinder areas other qualitative research focused directly on personal budget support (see below) research with staff may be undertaken to capture – among other things – evidence on: the financial issues claimants are raising with staff; what staff are doing to assist claimants; and, the advice they are offering. | N/A |

Good Practice and Lessons Learned – Financial Inclusion and Budgeting Support

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|--|---|---|------------------|
| <p>National Credit Union Expansion Project</p> | <ul style="list-style-type: none"> The Centre for Social Justice identified debt as one of the five key pathways to poverty Following a feasibility study to examine the scope and options for the modernisation and expansion of credit unions, the DWP will make a further investment in credit unions, conditional upon the credit union industry meeting a number of agreed milestones, to April 2015 | <ul style="list-style-type: none"> Work ongoing but the Credit Union Expansion Project aims to support the Social Justice Strategy of reducing debt by expanding credit union services to more people on low income It aims to help participating credit unions to achieve financial sustainability, and it will leave a legacy of financial systems support that other credit unions can benefit from in the future | <p>N/A</p> |
| <p>Hammersmith Live Innovation Trial Budgeting Club</p> | <ul style="list-style-type: none"> Trialled January to May 2013 to explore the best way to offer money management support in partnership with expert organisations outside of DWP Trial sought feedback on the use of an online personal planner tool as part of the referral process to money management sessions Hammersmith was identified as the most appropriate location as it has a relationship with the council where claimants are sign-posted for money management support sessions – ‘Money Matters’ Both the council and the local CAB were involved and delivered their own versions of ‘budgeting clubs’ | <ul style="list-style-type: none"> Claimants appear to struggle with the concept of preparation. Many saying they would be in work before UC affected them In order to make quality referrals staff need to fully understand themselves what providers are offering Decisions on which provider to attend was often down to location and if it was within walking distance Those attending were of the opinion that the sessions gave a good general overview but did not necessarily address individual needs. Many liked the interactive sessions and didn’t appear to like lots of dense literature 18-24 year old appeared to have different needs. Some showed a desire to have separate sessions Overall claimants did not return week after week, however most of the claimants interviewed after attending reported that they had taken some kind of positive step, for example, not using a pay day lender after hearing about the high interest rates | <p>N/A</p> |

Good Practice and Lessons Learned - Building and Maintaining Partnership Working

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|-------------------------------|--|---|------------------|
| Melton Borough Council | <ul style="list-style-type: none"> Established a 'Partnership Delivery Forum' which brings all key partners together in a monthly meeting and enables them, on an ongoing basis to resolve issues that are specific to an individual or are of wider importance to the delivery of services across their area. In addition, Melton has a number of partners co-located in their council offices which enables quicker, simpler resolution of issues for mutual customers | <ul style="list-style-type: none"> Partnership working takes time to build - start early - build the partnership with a focus on better outcomes for a specific cohort of people, not the traditional partnership themes A single assessment of needs and a single point of contact for customers supports better outcomes Develop strong links with JCP, the county council and other partners Link in with other key initiatives such as troubled families and children's centres | 1 |
| Rushcliffe Borough Council | <ul style="list-style-type: none"> Recognised that partners are not at the contact centre full time and so need to ensure continuity of service when partners not present Customer services advisors have undertaken shadowing with JCP advisors at the local JCP and vice-versa to improve skills and knowledge Also focused on integrating a variety of partner services into Community Contact Centre. A number of partners including JCP operate from the Centre on a part time basis Partnership events held in June and October 2013. Draft signposting directory produced and being developed to identify customers' needs and who is best placed to help them. Also to begin to establish data sharing protocols and processes for a 'warm hand-off' Offering multi-agency interviews (Rushcliffe BC benefits and strategic housing, JCP, Central College, referrals to Citizens Advice when necessary) for benefit cap customers | <ul style="list-style-type: none"> Clear tangible benefits to customers in providing access to multiple partners in this way, evidence suggests that there is less signposting, speedier resolution of issues and increased customer satisfaction where a number of services are provided under one roof | 2 |
| North Dorset District Council | <ul style="list-style-type: none"> Mapped partnership activity across a given locality to ensure reduction of duplication and effective signposting | <ul style="list-style-type: none"> More volunteers to help at Access Points and provide signposting to specialist agencies Working in partnership means we are making best use of scarce resources | 2 |

Good Practice and Lessons Learned - Building and Maintaining Partnership Working

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|---|--|---|------------------|
| <p>North Strathclyde Low Moss Prison Throughcare Pathway</p> | <ul style="list-style-type: none"> • Creation of joined up and holistic support service for inmates preparing for release and post release • Creation of a single pathway of joined up support provided through • a Public Social Partnership of public and voluntary sector organisations | <ul style="list-style-type: none"> • 9 offender outcomes identified as the main areas where ex-offenders needed support: <ul style="list-style-type: none"> i) Sustained or improved physical or mental wellbeing ii) Reduced or stabilised substance misuse iii) Reduced risk taking iv) Increased self sufficient living v) Increased access to and sustained suitable accommodation vi) Offenders apply problem solving and anger management skills in everyday lives vii) Maintained or improved relationships with families, peers and community viii) Qualifications gained and new skills used/developed/practised ix) Employment increased | <p>9</p> |
| <p>SSAC</p> | <ul style="list-style-type: none"> • A holistic approach to service delivery is necessary to eliminate duplication of effort, however, this is only achievable if, in addition to priorities, related funding streams are also aligned to ensure added value for claimants and better value for money to the taxpayer • It is recommended that in readiness for UC, potential service providers consider carrying out an initial assessment of the cumulative impact on services needed and the capacity required to deliver these services to identify potential future needs and any service delivery gaps • It is important that minimum standards of service are agreed between delivery partners to eliminate variability in local delivery and drive up consistency of service to ensure that only high quality support is offered to claimants | | <p>10</p> |
| <p>City of York Council</p> | <ul style="list-style-type: none"> • York Council recognised that libraries themselves are not very fashionable but cafés are places people want to go • Cafés in nice places with wi-fi are particularly fashionable so they have recognised this and re-branded and re-distributed library services • York Council have opened a 'reading café' in a local park • It has lots of activities for children, is an attractive café in an attractive location, but also has internet access and full library services | | <p>N/A</p> |

Good Practice and Lessons Learned - Building and Maintaining Partnership Working

| Location / Programme | Good practice identified | Lessons Learned / outcomes achieved | Published source |
|--|---|--|------------------|
| <p>City of York Council</p> | <ul style="list-style-type: none"> Have targeted financial advice to families most in need and emphasised community outreach to engage with those hardest to reach Are working closely with the credit union and the local CAB to undertake a range of initiatives. Have begun co-locating credit union and CAB with council staff in the same premises | <ul style="list-style-type: none"> A single port of call for residents offers access to a range of tailored support | <p>N/A</p> |
| <p>West Lothian Council</p> | <ul style="list-style-type: none"> West Lothian Council in partnership with Job Centre plus and other local organisations has developed a real 'one-stop shop' - West Lothian Connected - situated in the area's main shopping centre Have partnership arrangements with the main social landlords in the area, whereby dedicated LA Housing Benefit officers, located in landlord premises, greatly assist mutual customers | <ul style="list-style-type: none"> 'One-stop shops' provide a joined up service to customers and reduces duplication, inefficiency, and bureaucratic overheads | <p>N/A</p> |
| <p>Scottish Council for Voluntary Organisations</p> | <ul style="list-style-type: none"> A mapping report from the Scottish Council for Voluntary Organisations suggests that it is important to build on what is already known to work in order to support the many individuals that will be affected by welfare reform changes. This includes: <ul style="list-style-type: none"> An anti-stigma campaign debunking the myths about benefit recipients, much like the successful Scottish-wide mental health campaign See Me²⁰ should be developed Recognition from statutory partners of the value of investing in a diverse range of services to meet rising demand resulting from welfare changes, including work being undertaken by the Third Sector, which is unrelated to welfare reform A comprehensive mapping and qualitative assessment of welfare services available across all sectors (public, private and third) should be conducted | <ul style="list-style-type: none"> This helps create greater understanding among the public on the issues faced by recipients, as well as enabling recipients to claim without fear of stigma This needs to be carried out as soon as possible, in a smart and un-intrusive way This is crucial so that all organisations can build on what works, become aware of other projects in their communities, and successfully refer people to them as appropriate Need to develop an overview of all relevant mapping exercises, which will inform where further investment and action is needed at a strategic level | <p>N/A</p> |

20. <http://seemescotland.org.uk/>.

Annex B: Example of a single claimant journey (shared between JCP and a treatment provider) for a claimant with drug/alcohol issues

This illustrates an existing arrangement between Coventry JCP and local treatment providers of drug/alcohol services under the Joint-Working Protocol between JCP and Treatment Providers²¹. Many users of drug/alcohol treatment services are also users of local government sponsored services, like homeless hostels or Social Care services. Other services to support the claimant in developing enhanced life skills, like budgeting, and digital capability, could also be part of the journey.

Joint working arrangements between Coventry Job Centre and local treatment provider, the 'Recovery Partnership' (RP)



21. See <http://www.nta.nhs.uk/uploads/employmentandrecovery.final.pdf>

Annex C: Housing and Voluntary and Community Sector Organisations (VCS)

The social housing sector includes housing that is owned and managed by councils, Arm's-Length Management Organisations (ALMOs) for council housing stock and Registered Social Landlords (RSLs)²².

The key feature of social housing providers is that they provide dwellings at below market rents which are allocated to tenants according to housing needs, usually from council held housing lists.

Allocation of social housing based on needs means that social tenants include large numbers of people with quite complex support needs. In response to this many social housing providers have become active providers of support services to their tenants to ensure that they remain socially included. Many social housing providers also support tenants in developing the skills and qualifications to access employment.

VCS organisations perform two key roles within the welfare landscape. Firstly they have a 'welfare rights and advocacy' function, providing advisory and legal support to large numbers of people needing to access welfare and other services. Secondly they work intensively with some of the most disadvantaged in society, such as homeless people or those with drug or alcohol problems. They often fulfil these roles in partnership with social housing providers and councils. The sector includes large national charities (e.g. Shelter, CAB) alongside a myriad of small local or regional voluntary organisations who undertake this kind of work.

Social housing providers and VCS staff often spend considerable time with their clients, are known to them by name and often provide an intensive service to them. The aims of these organisations often complement UC policy; social and financial inclusion, personal independence and a work focus.

22. Also referred to as Registered Providers of Social Housing or Housing Associations.

Annex D: LSSF Trialling Menu

Partnership working

Testing partnership working

We propose to test the following key aspects of partnership working:

Planning and organisation:

- Creating effective partnerships for planning services – bringing the right people on board;
- Assessing and mapping local population needs;
- Commissioning services to support claimants;
- Managing changes across diverse networks; and
- Governance and chairing arrangements.

Managing funding at partnership level:

- Allocating funding between JCP and councils;
- Identifying other funding streams;
- Making and delegating decision making;
- Resolving disputes locally - only invoking the escalation process in exceptional circumstances;
- Management Information (MI) requirements; and
- Managing the performance of partnership organisations.

Our aim is to provide good practice guidance to help DWP and local government managers form effective partnerships, and involve partners from other sectors appropriately to plan effective holistic claimant journeys that are shared between support agencies.



Where there are two tiers of local government we would expect them to work together as part of the partnership and define the appropriate role each should play within it.

Assessing local population needs

We aim to be able to recommend good practice approaches to assessing complex needs within a local population. This will help to develop effective partnerships in advance of UC going live in each area.

A number of statistical toolkits are available for profiling the needs of populations such as the geographical area covered by a delivery partnership. For example:

- Centre for Economic and Social Inclusion (CESI) toolkit for English LAs²³
- LGAs’ ESD toolkit²⁴
- Office for National Statistics (ONS) Neighbourhood statistics²⁵

Partnerships may also wish to undertake specific data collection to support an understanding of local population needs, such as surveying the needs of people seeking support from JCP offices or local government ‘one-stop shops’.

Social landlords and key voluntary sector providers of services may also wish to capture a ‘whole person’ picture of the needs of service users in light of the changes being brought about by UC. For example, social landlords participating within the DPDPs have assessed and monitored the support tenants need to take responsibility for paying their own rent.²⁶

As part of smoothing the transition to direct payments DWP aims to work with social landlords to help identify tenants that will need some help and support and prepare them in advance of UC, as well as those that may initially need an APA.

23. <http://www.cesi.org.uk/social-justice-toolkit>.
 24. <http://www.esd.org.uk/esdtoolkit/default.aspx>.
 25. <http://www.neighbourhood.statistics.gov.uk/dissemination/>.
 26. <http://www.cih.org/directpaymentslearningnetwork>.

DWP will explore opportunities to move tenants that are more able and willing to direct payments early to move them a step closer to work readiness.

This intention was set out in a speech to the Chartered Institute of Housing in the summer and is being progressed as part of landlord preparation activity. Social landlords who take part in this may identify a PBS requirement that could provide a useful input for trialling purposes.

Delivering services through partnership working

As well as understanding how best to bring the right agencies together to plan services, actual delivery of a joined up and holistic service represents the ultimate aim of the LSSF approach. We will, therefore, be trialling approaches to service delivery to ascertain good practice in this area and to inform guidance and the other tools required to support the approach (for example, the funding instrument and delivery partnership agreement template).

We are keen to test how referrals between agencies can be managed to reduce the need to gather information more than once and to maximise the likelihood of claimants attending appointments. This could be through ensuring a warm hand-off, rather than just signposting, or by allowing a claimant to speak to a named individual about what time they should come in for an appointment.

We would like to work towards the principle of a single claimant journey for an individual with complex needs, including how to engage the claimant in planning their journey towards independence and work.

Communicating this approach to front line staff will also be key to our success. Staff will need to have a clear sense of the local strategy in place for supporting claimants with specific complex needs and will need to have knowledge of, and access to, the bigger picture holistic support available for the people they are working with.

Overarching Partnership Agreement / Delivery Partnership Agreement

Overarching Partnership Agreements

Work is progressing on the design and development of the OPA that will be signed by DWP and each of the LAAs in England, Scotland and Wales.

The OPA will reflect the agreement at both a corporate and strategic level between DWP and each of the LAAs in respect of the LSSF.

The OPA will set out the overarching principles that should apply to all DPAs, though it is recognised that there will be the need for flexibility dependent on any differing approaches taken. In summary the OPA will likely cover:

- Strategic partnering principles;
- Forming partnerships;
- Service delivery;
- Service expectations;
- Commissioning;
- Management of funding;
- Shared values and critical success factors;
- Continuous improvement; and
- Governance and dispute resolution.

The aim is to have the OPA signed off in advance of any further roll out of UC with regular reviews of the OPA being undertaken as further information on the funding for LSSF and roll out becomes available.

Delivery Partnership Agreements

Delivery Partnership Agreements are already in operation in Pathfinder between JCP and the council in each location. These were further refined (based upon lessons learned) for the progressive national roll out of UC between October 2013 and March 2014, and will continue to be developed in preparation for the next stage of progressive roll out of UC in 2014/2015.

Financial Management

Approach to financial management

DWP is working with LAAs to develop the financial management approach to the local support services that are newly required or experiencing an increase in workload as a direct consequence of UC.

Local partnerships between LAs and JCP will need to agree who delivers what services to which claimants, assess the cost of delivering those services and agree upon funding. This discussion includes agreement as to whether DWP or local government services are best placed to deliver services, as well as considering where other partners, such as Housing Associations or the Voluntary Sector, may be able to deliver services more easily or efficiently than JCP or council staff.

The financial management approach will:

- Incorporate joint decision making between LAs and JCP of funding at a local partnership level;
- Agree partnerships responsible for ensuring the specification of services, allocation of funding, and the quality and effectiveness of service; with the key principles of governance described in the OPA;
- Ensure that in the very exceptional cases where dispute resolution is required issues will be escalated to a senior DWP operations director for a decision. DWP will ensure that LAAs have sight of issues escalated and will, where appropriate, seek support from the LAAs in resolving any issues;
- Provide the opportunity to align LSS funding with other DWP and local government resources providing similar services for claimants, to facilitate more holistic support at the local level; and
- Be flexible enough to accommodate the potential inclusion of future ESF funding (for those activities that are focused on helping claimants to get closer to the labour market).

Structure of the financial model

A financial model with 'outcome', 'activity' and 'guaranteed' elements will be trialled. The 'guaranteed' element will support the establishment of the core services to support claimants, with the 'activity' element managing the financial risk that the volume of claimant interventions required is significantly different to that anticipated. The 'outcome' element will ensure that funding supports services that genuinely make a difference for claimants.

It is anticipated that the proportion of total funding paid for the achievement of 'outcomes' will increase as the local support service matures and UC moves from transition to steady state. We will be trialling different approaches to measuring claimant outcomes with this in mind.

The achievement of each outcome will be rewarded by the same per cent share of overall outcome funding (i.e. all outcomes will have equal weighting) and outcome payments will start to be earned from defined minimum thresholds, with the maximum being earned at the full outcome target level (i.e. not just a binary 'achieved' / 'not achieved').

There is strong support for the proposal to financially incentivise support for 'harder to help' claimants. For testing and trialling purposes 'harder to help'²⁷ claimants are defined as:

- Claimants with mental health issues;
- Claimants with learning difficulties;
- Claimants with drug or alcohol addiction; and
- Claimants who are homeless.

High level first order outcomes will be agreed nationally. There is, however, scope to agree additional local outcomes between partner organisations.

Outcomes should initially focus on two specific areas: i) access to UC and ii) financial inclusion with an emphasis on helping claimants progress from dependency on welfare towards financial independence.

27. Source: UC Programme Analysis, 2012.

We will also investigate opportunities to link 'work readiness' to LSSF outcomes during testing, recognising other activities taking place to help claimants into sustainable employment (for example Work Programme contracted provisions). The role councils could consider undertaking in relation to work readiness is separate from, but should compliment, any mandatory work related requirements that the claimant may be subject to under the statutory conditionality regime.

We will also trial the application of 'block funding' in some areas. Block funding would provide core and activity based funding until roll out of UC reaches steady state. While outcomes may be agreed locally, funding would not be dependent upon them.

Trialling the financial model

There is an opportunity to trial the financial model (with the guaranteed, activity and outcome elements). This trial will look to understand the approaches delivery partnerships follow to:

- Work together to agree how funding (resources) are deployed at the local level;
- Ensure services are flexible enough to cope if demand is higher or lower than expected;

- Agree upon how the relative contributions made to outcomes will be apportioned between different partners;
- Create appropriate incentives for supporting for the hardest to help, and learn lessons / identify best practice in this area; and
- Determine the level of administration (and associated cost) required to support the operation of the financial model and the gathering of MI to understand partnership performance.

Where alternative approaches to implementing LSSF are still being considered, trialling offers the potential to understand the relative impact and effectiveness of the alternatives. Trialling additionally offers the opportunity to measure and/or get supporting evidence of the difference that the LSSF makes for claimants and the benefits that accrue from this change.

Examples of Testing and Trialling Outcome Measures for Supporting Claimants with Complex Needs

| Category | Outcomes | Examples of potential service/s supplied, underpinned by delivery partnership agreements – to be agreed by the partnership at local level |
|--|---|---|
| <p>Making and managing a UC claim</p> | <p>An overall percentage improvement versus the baseline position in the number of claimants in the ‘vulnerable’ claimant categories (LSSF Annex C) requiring repeat appointments until the point at which they can confidently and successfully submit their own claim and manage their own changes in circumstances.</p> | <ul style="list-style-type: none"> • Training and development plan for partnership staff to enable them to identify claimants with complex needs requiring additional help, and appropriate and effective triage to any specialised support network identified – improved data sharing / communication • DWP and local government working together to effectively help claimants with complex needs and enable them to move towards self-sufficiency • Effectiveness of referral process, staff trained sufficiently about UC to be able to support claimants – a single point of contact in each location • Digital upskilling initiative for claimants with complex needs – DWP and local government to work together to share services to achieve shared goals |
| <p>Managing monthly payments</p> | <p>1) An overall percentage improvement versus the baseline position in the number of APAs recorded locally</p> <p>(To investigate possibility of using IT system (e.g. CPS) to count number of APAs in place per LA, based on postcode)</p> <p>2) An overall percentage improvement versus the baseline position in the number of claimants paying their own rent directly to the landlord for a sustained period of time e.g. 6 months.</p> | <ul style="list-style-type: none"> • A financial inclusion advice service / single journey or process which is timely • Monthly money action planning service • Scope for locally agreed outcomes with local partner organisations, as well as national partner organisations e.g. Money Advice Service, to support this outcome e.g.: <ul style="list-style-type: none"> - increase in the number of claimants who are able to complete and maintain a money action plan relevant to their circumstances - helping claimants get a transactional bank or credit union account (where previously they hadn't got one) to incentivise prevention of APAs |

We will also consider exploring other suitable outcome measures.

There is also an opportunity to shadow test the non-outcome element of the financial model (which will consider the guaranteed component of funding and its links to activity). To do this effectively, the model will need to:

- Give councils (and where relevant, their delivery partners) the opportunity to establish a defined level of service (i.e. be able to deliver the service to claimants as dictated by demand);
- Test the assumptions and risks with the allocated funding where claimant volumes are substantially below (to ensure that we can demonstrate value for money in public finances), or substantially above, anticipated levels in the early years of the service (where the funding will be finite);

- Assess the value for money that results from the provision of the local support service; and
- Define the timing and frequency of payments.

Trialling offers the opportunity to measure and/or get supporting evidence of the difference that the LSSF makes for claimants and the benefits that accrue from this change.

It is likely that these working assumptions will be refined during this trialling and testing period (with the benefit of lessons learned during shadow testing) with a final set of agreed principles and proposals for publication in the LSSF in the autumn of 2014.

Trialling the effectiveness of the delivery of front line services

We will trial ways to identify claimants' needs accurately, and ensure that they are able to access all aspects of UC – benefit payment and work focus - with the most appropriate support.

We will build on work such as the examples in **Annex A**. This shows how some DWP and council staff have developed comprehensive ways to understand claimants' support needs and provide them with the appropriate level of service.

The ultimate aim is to equip local partnerships to deliver effective services to those needing support.

At front line level we would like to capture examples of:

- Assessment and triage of individual claimants to refer them to appropriate services and levels of support;
- Arrangements for digital access and support;
- Arrangements for Personal Budgeting Support;
- Creating a joined up and tailored claimant journey for case managing claimants with complex needs, including practical concerns such as ensuring that sharing information about a claimant between multiple agencies is done lawfully; and
- Measuring outcomes for local support services.

Other specific aspects for testing

Work readiness

'Work readiness' is a core responsibility of DWP through its JCP network and it is about getting a claimant to the point where the individual is ready, willing and able to contribute to a working community. The objective is to ensure claimants are equipped with the knowledge, skills and abilities need to succeed in the 21st century workplace, through the acquisition of, for example:

- Lifelong learning skills;
- Basic workplace / employability skills and knowledge;
- Basic work related technical skills; and
- Interpersonal skills and increased confidence.

As a result, individuals with complex needs, of any age and background, can realise their potential, and wherever possible meet the demands of entry level work, or confidently seek more / better paid work, as a platform for individual success and self-sufficiency.

JCP does this through working with local partners such as the Skills Funding Agency (SFA), councils, the local community and voluntary sector and non-contracted providers.

Applicability of the European Social Fund

We are also keen to explore how LSSF services could be compatible with future applications to the ESF by English LAs²⁸; in particular where ESF funding can support the claimant journey from accessing welfare services through to participation in the labour market. It should be noted however, that statutory work services support (assistance and interventions to maintain the claimant commitment and conditionality requirements) will continue to be provided by DWP and Work Programme (WP) providers under their contracted provisions.

28. This recognises that Wales and Scotland have their own funding authority.

Annex E: Trialling Prospectus

This is a list of elements we consider could be trialled to inform LSSF, and the most suitable locations, however detailed plans have yet to be developed and may be subject to change. We would welcome comments on these proposals, together with any expressions of interest in working with us to further develop these trials.

| LSSF Element | What do we want to learn? | | | | UC progressive roll out | | | LA led Pilots | Future testing | Volunteer test sites |
|---|--|--|--|--|-------------------------|--------------------|-------------------------|---------------|----------------|----------------------|
| | | | | | 4 sites (Pathfinder) | 6 sites (Oct 2013) | Next stage of expansion | | | |
| Testing the Process | | | | | | | | | | |
| Partnership Working | | | | | | | | | | |
| Planning and organisation | <ul style="list-style-type: none"> What are the most effective models for partnership working Who are the key members and what are their roles at various stages What terms of reference or memorandum of understanding is needed How to share information and data securely and legally | | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Managing funding | <ul style="list-style-type: none"> How do we ensure that joint decision making is an effective means of deploying resources where they are most needed at a local level What is the best way of identifying and accessing additional funding streams What impact does it make when non-LSSF specific resources are utilised by LSSF related services What funding frameworks are already in place, or can be developed Test the model assumptions on the cost to deliver LSSF related services What is the admin cost of the partnership and what MI is needed | | | | ✓ | ✓ | ✓ | X | ✓ | X |
| Assessing local needs | <ul style="list-style-type: none"> What is the best way to assess and monitor changing local population requirements What is the best way to identify the pattern of local services, key players and any gaps in service building on existing services How should partnerships map access and structure LSSF services to meet local need | | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Delivering services through partnerships | <ul style="list-style-type: none"> How does delegated decision making work What MI is needed and how to collect it Who will deliver what services to which claimants What models of service delivery are being used How is information and data shared to improve service delivery How is the performance of service providers best managed and monitored How are partners working together to provide a seamless service and avoid unnecessary handoffs Does the dispute resolution process work (where needed) | | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

| LSSF Element | What do we want to learn? | UC progressive roll out | LA led Pilots | Future testing | Volunteer test sites |
|---|---|-------------------------|---------------|----------------|----------------------|
| DPA | <ul style="list-style-type: none"> How is a DPA agreed Does the DPA structure require further development | ✓ | X | ✓ | X |
| Financial Model (including outcome based approach) | | | | | |
| Assessing value for money (vfm) of LSS | <ul style="list-style-type: none"> What is the impact of LSSF for claimants and on the local area How can we identify and capture robust evidence to support the vfm assessment What is the impact of LSSF on existing Housing and VCS services | ✓ | X | ✓ | ✓ |
| Structure of the financial model | <ul style="list-style-type: none"> What is the best way to reach agreement within the partnership to develop the overall approach, the percentage split of elements of the model (guaranteed/activity/outcome) and baselines to measure outcomes compared with a block funding approach How does the financial model respond to fluctuating demand What are the admin costs of operating the financial model, and what MI is needed and the ease of gathering data | ✓ | X | ✓ | ✓ |
| Testing the Effectiveness of the Service | | | | | |
| Assessment and triage | <ul style="list-style-type: none"> How do we ensure triage resource is targeted at those most in need Are claimants' support needs being accurately identified through the triage Does the service offer claimants effective support What role should LAs, social landlords & VCS play in the triage process | ✓ | ✓ | ✓ | ✓ |
| Online access and digital support | <ul style="list-style-type: none"> What is the most effective way of signposting/referring to online support How can partners provide online support for different groups, using the best of local capability Does providing effective online support improve claimants' capability to manage claims/ access other services online in the future | ✓ | ✓ | ✓ | ✓ |
| PBS - Money Advice and APAs | <ul style="list-style-type: none"> How do we ensure those who need PBS recognise the need and take up the support available What is the most effective way of referring to PBS What difference does it make if PBS is the only support need identified or if it is one of many support needs How effective are PBS providers in helping claimants manage the standard single monthly payment, and their own finances including housing costs | ✓ | ✓ | ✓ | ✓ |
| Joined up approach | <ul style="list-style-type: none"> How can information and data-sharing help joined up case management What agencies / staff need to be involved for claimants with different support needs | ✓ | ✓ | ✓ | ✓ |

| LSSF Element | What do we want to learn? | UC progressive roll out | | | | | LA led Pilots | Future testing | Volunteer test sites |
|---|--|-------------------------|---|---|---|---|---------------|----------------|----------------------|
| Other specific areas for testing | | | | | | | | | |
| Work readiness | | | | | | | | | |
| Work readiness | <ul style="list-style-type: none"> How can the partnership work together to align LSSF activities or funding around provision provided by JCP to equip claimants with the knowledge, skills and abilities to help them get ready for work | X | X | X | X | ✓ | ✓ | ✓ | |
| ESF Funding (England only) | | | | | | | | | |
| Suitability of ESF funding | <ul style="list-style-type: none"> How can ESF funding be best accessed and deployed to support LSSF services | X | X | X | X | ✓ | X | X | |

Annex F: Establishing the level of support required: Advantages of early planning

UC Transition: Support needs analysis

In readiness for the transition to UC the London Boroughs of Lambeth, Lewisham and Southwark have been working in partnership with DWP colleagues in South London to undertake a LSSF support needs analysis. By using the LSSF Mapping Tool they have been able to analyse the current range of services that the Boroughs and JCP currently provide to identify service delivery gaps and potential future needs. The 3 Boroughs were asked for their views on undertaking this piece of work.

What has been the value for you in undertaking this piece of work so far?

Undertaking this analysis has given the Boroughs a much clearer picture of the number of residents that will be affected by UC and the type of needs they will have. It has encouraged thinking about the likely resource impacts the roll out of UC will have on the councils and sharing and comparing data across three councils has helped to both validate and challenge current thinking. As a result, the Boroughs have been able to better identify particular groups that will require extra support when UC is introduced. This work has allowed them to forecast the potential needs and costs of delivering support services under UC and to identify which services are going to be most vital for a smooth transition to the new system. Gathering together information on current service provision and utilisation has helped the Boroughs to highlight the areas in which there is going to be an increased need for support. All this is a critical piece of work within the commissioning cycle and will mean that the LSSF that is designed and delivered will be much more likely to effectively meet needs and achieve desired outcomes. The support needs analysis has also helped to identify what data is held, and by whom, and has also highlighted gaps in available data.

What have you learnt so far?

The Boroughs are starting to understand the level of need for support through UC transition and the diverse channels of support that currently exist. In Lambeth, as a part of their work on building financial resilience, they have organised focus groups and undertaken ethnographic research that covers some of the key LSSF areas. They have also undertaken small scale pilot projects with multiple debtors, those without bank accounts and those with particular support needs. This, coupled with the support needs analysis data has provided them with reliable information on the likely level of demand/need and the amount of support that will need to be provided (in hours and volume) for different service elements within the framework.

Lewisham is an LA led Pilot area and the needs they have identified through the pilot and the support needs analysis has confirmed that they are broadly consistent with neighbouring boroughs. The information they now have from both of the latter is allowing them to plan the services required to help residents transition to UC as the roll out begins.

What do you intend to do with the information you have gathered going forward?

The information the Boroughs now have will help inform a gap analysis of services compared to the existing provision thereby helping to make the case for the necessary funding for LSSF operations. The Boroughs expect to use this data with partners to inform the commissioning of services within the LSSF framework when everyone is clear on the amount of funding that will be available. Understanding the affected cohort as well as they do now will also enable a prioritisation of needs/demand, orient council and other existing services appropriately, make system changes where needed and ready partners and others who will be working with UC claimants (e.g. banks, credit union, Third Sector).

This work fits within the planning section of the commissioning cycle:



It has allowed the Boroughs to assess the need of potential UC claimants, review current services and decide on priorities for service provision. The next step will be for commissioners to design the services that will fit within the LSSF.

Has this exercise given you any ideas for doing anything differently already?

The scale of the need and the extent of the service capacity needed to meet it will be challenging. The support needs analysis is highlighting how much support will need to be put in place in addition to existing service provision. Appreciating this in the detailed way the Boroughs do now will inform commissioning plans not just for the LSSF but across the piece, as everyone works to create whatever capacity and opportunities are needed within existing service provision.

In Southwark, plans already included operating as a partnership with JCP, VCS and other partners and investigating the opportunity for tri-borough cooperation and possibly shared services. This exercise has reinforced the view that this is important and provided a good example of tri-borough working in practice as they have jointly been able to fill gaps in knowledge around customer need. It has reinforced the view that a local framework must be able to respond to local needs and that more work is required to understand what this means in practice.

Annex G: Support Services Descriptions

The broad service descriptions that will be required to support the delivery of UC include:

- **Provision of basic advice and information to help someone claim**
 - Provision of basic information about benefits and how to claim;
 - Triage and Orientation to get claimants to the appropriate level of support for using the digital channel, or to direct them towards an alternative channel; and
 - Welfare Rights Advice and Support.
- **Online access**
- **Assisted digital claiming**
- **Intermediary support**
 - Providing accessibility and Communication Aids where required; and
 - Complex needs support (e.g. for claimants who have learning difficulties or numeracy / literary difficulties).
- **Financial inclusion**
 - Helping people to access banking products; and
 - Financial products provision.
- **Money advice and budgeting support**
- **Identifying cases for an APA**
 - Identifying potential cases for exceptions payments and maintaining connections with housing providers where a payment of rent direct to a landlord will be required; and
 - Exception referrals and managing the process for setting up an APA.



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