

# Local government and Universal Credit



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# Forewords



Councillor Sir Merrick Cockell  
LGA Chairman

The Government's welfare reforms are extensive and far-reaching in both their scope and their ambition. The introduction of Universal Credit (UC) is a key element of the 2012 Welfare Reform Act which aims to make the benefits and tax credit system simpler.

Local government is at the heart of an effective and innovative response. From the outset the Local Government Association (LGA) and councils were clear that supporting UC claimants is inevitably a part of our mission to improve the lives of local residents in locations and at a scale that makes sense to them.

We worked with the Department for Work and Pensions (DWP) to set up eight English pilots to test local government's role providing face-to-face support to UC claimants. The establishment of the pilots recognised our shared understanding that many of those who are affected by the changes will continue to look to councils and local voluntary organisations as their principal source of advice and support.

The pilots have helped to identify the challenges that councils and partners will face when implementing UC, and most importantly, developed practical solutions that other councils can learn from – including innovative tools to help claimants manage

their finances and supporting them to develop digital skills.

We recognise that the scale, intent and pace of the changes will have considerable impact on councils and communities, much of which will only be seen and understood in real time as the changes are gradually implemented across the country from the autumn.

Councils also want to work with partners to plan for the implementation as best they can, and communicate to residents about how they will be affected by the changes, so we hope sharing the rich interim learning from the UC pilots is helpful.

It is also very clear from the pilots that UC and the introduction of the benefit cap cannot be viewed in isolation from other welfare reforms. We hope that the Government will take full advantage of what councils have to offer here, not just in terms of processing benefits but stretching the offer to encompass preventative actions like homelessness, employment and training that lie within our core competences.

The next few months will be crucial in giving councils the certainty and clarity on the roll-out so that they can take decisions and allocate resources. I look forward to continuing to work in partnership with the Government to achieve this.



## Lord Freud Minister for Welfare Reform

The local authority-led pilots are a real and positive example of the strong links my department and the Local Government Association have forged over recent months.

They provide a unique opportunity to ensure that the rollout of Universal Credit (UC) will be enhanced by the local support that local authorities and their partners will be providing to improve the claimant experience.

Since I launched the pilots in September, I have taken and will continue to take a close interest in their work. I am pleased with their progress and the joint working at local and national level that supports pilot activity.

I fully recognise the value and importance of the learning to the development of UC, the Local Support Services Framework (LSSF) and the planning that councils and DWP officials will undertake in developing local partnerships to support claimants as UC is implemented.

In response to representations by the Local Government Association and endorsed by the chief executives of the pilot councils, my officials are now working with the pilots leaders to ensure closer alignment between the work of the pilots and the development of the LSSF. We are also working collaboratively to strengthen and assure the learning from the pilots.

We will shortly be publishing a Summary of Key Learning Points and Case Study Examples from the pilots. Together, these two documents will inform the work being taken forward in many local authorities and DWP Jobcentre Plus Districts and the next iteration of the Local Support Services Framework, as well as the design and implementation planning for Universal Credit.

# Universal Credit and the role of local government

**As a result of much work by the LGA family and partners over the past 18 months, the DWP has recognised that there will be a role for local government in the delivery of frontline support for UC. This resulted in the establishment of the local authority face-to-face pilots programme and a joint programme of work to scope out local government's role in UC. There is regular political dialogue and the LGA also represents English councils on a number of DWP official-level groups with Welsh and Scottish councils represented by Welsh Local Government Association (WLGA) and the Convention of Scottish Local Authorities (COSLA) respectively.**



## **The roll-out so far**

Universal Credit replaces a number of individual tax credits and benefits including housing benefit. It will be digital by default, with a target of 80 per cent of transactions on line by 2017, and be paid monthly in arrears directly to claimants. It will be rolled out on a phased basis between autumn 2013 and 2017, although we do not yet know which clients will be migrating or when. UC will not apply to pensioners and instead housing benefit will be migrated into a modified pension credit between October 2014 and 2017.

The benefit cap for out of work households will be implemented in a phased approach from this summer and is designed to ensure that no household or individual is in receipt of benefits more than average earnings after tax and national insurance. It will only apply to workless households and is set at £500 per week for couples and lone parent households and £350 per week for single person households. Until UC is introduced it will be enforced by councils through housing benefit and a number of the UC pilots are testing the support that claimants need to manage the impact.

On 29 April 2013 the first UC pathfinder went live in Ashton-under-Lyne Jobcentre in Tameside, Greater Manchester. Three other job centres – in Wigan, Warrington and Oldham, will begin testing UC in the summer. Around 7,000 people are expected to receive UC during the pathfinder period with an initial focus on single jobseekers.

## The pathfinder experience – Tameside Council

Tameside's core purpose in agreeing to be a Pathfinder authority was to protect the financially vulnerable in making the transition from existing benefits onto the new benefit. We were keen to put our residents first.

In preparation for UC we worked with the DWP in setting up a self-service Hub in the main council offices. The Hub provides free PCs for online access to UC, Housing and Council Tax benefit and other DWP benefits. The Hub supports existing PC access in libraries and Customer Service Centres across the Borough. Working with Citizens Advice, 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. We have appointed three previously unemployed people to provide support for online activity during Pathfinder and commissioned Citizens Advice Bureau (CAB) to provide Personal Budgeting Support on our behalf. CAB are contracted to help claimants with online form completion, register with Universal Jobmatch and complete applications for Council Tax Support.

We have also worked with a local training provider to promote online access to UC and provide IT skills to support job searches. The training provider agreed to design a course to get online and stay online particularly focusing on UC job search and job match, CV writing and work readiness.

The local MiNT (network of money advice agencies – Money information Network Tameside) worked with Registered Social Landlord's (RSL's) on providing budgeting support in addition to that provided by CAB and we have held three Landlord Forums for both RSLs and private landlords specifically on UC implementation.

As part of a joint Greater Manchester initiative we have a Benefits Bus which visits various towns to promote benefits advice and the bus has already attended specific Pathfinder postcode areas and more visits are planned.

We have also worked with Health and Wellbeing partners in producing a welfare reform leaflet accessible at local GP surgeries and provided stakeholder briefings to drug, alcohol and mental health groups and those that work with vulnerable adults. We provided information on UC and promoted get online and stay online message at a local jobs fair and put in place an evaluation process for all UC claimant contact for Self Service Hub, customer services, benefits and corporate call centre and libraries.

DWP also established six direct payment demonstration pilots to test the impact of paying monthly housing benefit direct to social housing tenants. Annex A to this publication is a list of pilots and details how to find out more information about their learning.

### **Local Support Services Framework**

In February 2013, the DWP and the local authority associations jointly published a draft Local Support Services Framework for UC, which described the sort of support services councils might need to provide or commission for UC claimants, and how those services might be paid for and managed. We saw that as opening a very important conversation about the future role of local government in helping to ensure that UC can be delivered with minimum risk.

The Framework was a very helpful starting point, and as we work with DWP on the next iteration to be published in the autumn, we are proposing the following approach:

- Local Support Services should be commissioned from a diverse provider base, including DWP and council employees, but also drawing on private and voluntary sector expertise and resources. Councils are best placed to play a central and default role, not least because they will be contacting many of the client group with Council Tax Support.
- Services should be commissioned locally on a geography that makes sense for customers, taking into account the location of existing service outlets and the scope for rationalising the public sector estate in both the short and medium term.
- Local commissioning should be accountable to the community as well as

properly accountable for public money. We therefore strongly endorse the Government's proposal for commissioning through local partnerships. The Community Budgets experience provides a powerful model for how this partnership approach might be organised.

- The local partnership should agree a commissioning plan, which should detail the outcomes sought, the funding allocated to each outcome, and the allocation of delivery responsibility. That commissioning plan would be the basis of a funding agreement with DWP. It should be supported by agreements with individual local delivery bodies.
- It should be up to local partnerships to decide what specific support services should be provided and by whom, but an illustrative menu of services which the Local Support Services budget is intended to fund could be extremely valuable in helping to shape the local offer.
- We strongly support DWP's desire for a proportion of the funding to be outcome based, but we need to both incentivise preventive action that will help clients achieve independence and make it financially possible where the costs may fall up front.

It is important that there is clarity on the timetable and geography of transition for UC claimants. We are also working with DWP to resolve key issues including data sharing and the future role (and potential for transfer) of council staff.

## Community Budgets

Essex, Greater Manchester, West Cheshire and the London Tri-borough (Hammersmith & Fulham, Kensington and Chelsea and Westminster) piloted a new approach to local public service transformation during 2012.

In each of the four areas a range of partners, including NHS Trusts, the police, Jobcentre Plus, councils, the voluntary and private sectors and educational establishments worked together. The pilots demonstrated the benefits of aligning resources, reducing duplication and sharing information through working together to break down public, voluntary and independent sector boundaries and joining-up related, but disconnected delivery silos. This model of collaborative leadership around the needs of a place is potentially very well-suited to commissioning local support services for UC and we are pleased to be working with DWP to test this approach further over the summer.

## The Universal Credit Pilots and getting ready for the roll-out

**The establishment of the local authority-led face-to-face pilots in autumn 2012 recognised our shared understanding with DWP that many of those who are affected by the changes will continue to look to councils and the voluntary sector as their principal source of advice and support.**

Each pilot is focussing on different practical aspects of implementing UC and has received additional funding and support from DWP. This is important to enable the testing of new ways of working, but when looking at transferrable learning from the pilots, we need to take into account that other councils will not have access to that extra support.

The pilots are helping to identify the challenges that councils and partners will face and, most importantly, developing practical solutions that other councils can learn from – including innovative tools to help claimants manage their finances and supporting claimants to develop digital skills.

Councils are also very aware that families and individuals may be affected by more than one aspect of welfare reform, and that the success of the reforms will depend on achieving the right balance between access to suitable employment, availability of appropriate and affordable housing and support and stability for those who are unable to work, and for those who will need the most support to enter employment. The LGA has commissioned research, which will be launched in the summer, that will help councils to understand and map the

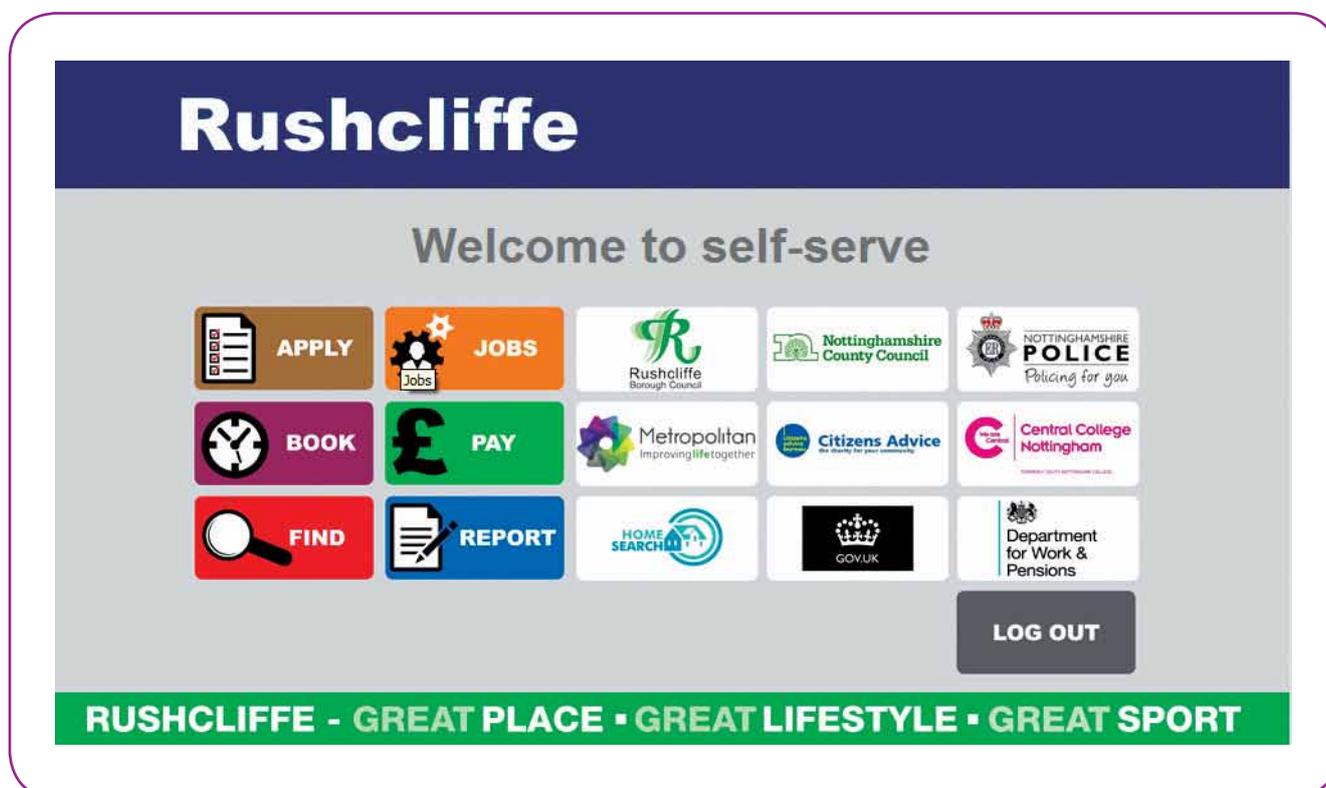
aggregate financial and geographical impact of the Government’s programme of welfare reforms. This will help councils, the Government and other service providers by improving their understanding of the potential behavioural and market effects of the changes.

The table below summarises the main learning points from the pilots and full case studies are over the page. Although we do not yet know the detail of the roll-out, the rich learning from the pilots suggests that there are practical steps councils can take now to start to plan for UC.

Theme	Top learning points from the pilots	Getting ready check list
Partnerships	<ul style="list-style-type: none"> <li>• Positive partnerships between Jobcentre Plus (JCP) and councils are vital.</li> <li>• Co-locating agencies providing local support services helps to provide a single point of access for customers.</li> <li>• There are challenges around data-sharing and sharing IT facilities, but these can generally be overcome by early engagement.</li> <li>• There is a big cultural change for staff as their focus shifts to supporting claimants’ independence.</li> </ul>	<ul style="list-style-type: none"> <li>• Who will you need to work with to deliver local support services and what is existing local provision?</li> <li>• Do you have an existing partnership that could be responsible for the UC roll-out?</li> <li>• Are you in regular contact with your district JCP Manager?</li> <li>• How might UC link to any local work on Community Budgets or Troubled Families?</li> <li>• Have you started to think about how you will identify vulnerable claimants who may need extra support across jobs, budgeting, housing and online access?</li> </ul>

Theme	Top learning points from the pilots	Getting ready check list
Personal budgeting	<ul style="list-style-type: none"> <li>• 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.</li> <li>• One-to-one budgeting support can be more effective than group sessions.</li> <li>• Be aware that some claimants do not have a passport or driving licence to use as ID when opening a bank account.</li> <li>• Personally introducing the claimant to organisations who can support them on budgeting can be more effective than simply signposting.</li> </ul>	<ul style="list-style-type: none"> <li>• Have you mapped organisations who are already providing budgeting support in your area?</li> <li>• How are you engaging your local credit union in getting ready for UC?</li> <li>• Have you talked to your local banks about how they may be able to help people to open current accounts?</li> </ul>
Online support	<ul style="list-style-type: none"> <li>• Generally there is a low level of awareness amongst claimants that UC will be digital by default.</li> <li>• Supporting people to get reliably online takes time and there are different kinds of barriers that need to be addressed.</li> <li>• Many claimants do not have personal email accounts.</li> <li>• Claimants need to be aware that access to the internet via a mobile phone is not sufficient to complete the UC form.</li> </ul>	<ul style="list-style-type: none"> <li>• How comprehensive is your broadband coverage?</li> <li>• Do you know how many of your residents who will be affected by UC do not have access to a PC or do not have the right digital skills?</li> <li>• Have you mapped public internet access points in your area, such as libraries and community centres?</li> <li>• Have you got existing digital champions who can help claimants develop their IT skills?</li> </ul>

Theme	Top learning points from the pilots	Getting ready check list
Housing and work	<ul style="list-style-type: none"> <li>• Tenancy sign-up is a golden opportunity to identify claimants' needs.</li> <li>• Integrating housing and employment support can help to provide joined-up support to claimants.</li> <li>• Direct in-person referrals to support and advice are often more effective than signposting, although this does have resource implications.</li> </ul>	<ul style="list-style-type: none"> <li>• Have you mapped organisations who are already providing housing and employment support in your area?</li> <li>• How are you engaging social housing and employment advice providers in preparations for UC?</li> </ul>
Communicating to people about the changes	<ul style="list-style-type: none"> <li>• Don't underestimate the volume of enquiries that will be generated by UC.</li> <li>• A personalised approach, such as hand-written envelopes, makes a big difference when contacting claimants about the impact of benefit changes.</li> </ul>	<ul style="list-style-type: none"> <li>• What are you doing to let claimants know that UC will be digital by default?</li> <li>• How are you briefing your staff and partners' staff about UC?</li> <li>• Have you got plans in place to deal with a possible increase in enquiries about UC?</li> </ul>



# Universal Credit Pilot learning seminars for councils

The LGA is working with the English UC pilots to capture and share the learning widely through a programme of regional events in the autumn. To book your place and find out further information, please visit: [www.local.gov.uk/events](http://www.local.gov.uk/events)

Details of the events confirmed so far are below:

**North Dorset District Council**

6 September

**Melton Borough Council**

10 September

**London Borough of Lewisham**

23 September

**Oxford City Council**

1 October

**Rushcliffe Borough Council**

14 October

**Bath & North East Somerset Council**

21 October

**Birmingham City Council**

12 November

**West Lindsey District Council**

27 November

To book your place, please visit the LGA website: [www.local.gov.uk/events](http://www.local.gov.uk/events)

You can also keep up to date with the latest welfare reform policy news from the LGA by signing-up for the LGA Finance Bulletin on the LGA website: [www.local.gov.uk/ebulletins](http://www.local.gov.uk/ebulletins)

# Case study

## Rushcliffe Borough Council

### Objectives

There are three key aims:

- to help people claim online so they can apply for UC
- work closely with partners to focus support for customers with often complex needs and integrate services
- identify and support vulnerable customers including those without skills to claim online, for example, perhaps due to disability, illness, no computer, lack of a bank account and so on.

### About Rushcliffe

Rushcliffe lies immediately south of the City of Nottingham and the River Trent and extends across towards Newark in the North East and Loughborough in the south west. The main centre of population is West Bridgford, where around 41,000 of the Borough's 111,100 population live. The remainder of the district is largely rural, with the centres of population split between small towns and villages.

- There are 6,110 housing benefit and council tax claimants in Rushcliffe.
- There are about 4,000 customers claiming Job Seekers' Allowance (JSA) or Employment and Support Allowance (ESA).
- In April 2012, 46 per cent of new housing benefits were made online, but by

June 2013 this had increased to 87 per cent.

### Where are we now?

#### Moving customers online

- We have removed our paper housing benefit claim form – customers have to apply online.
- We have trained our social housing colleagues to use the online housing benefit form.
- We call customers back at a convenient time to help them complete the online form.
- In January 2013 we launched a user friendly website to help people apply for both council and DWP benefits, find information about local jobs and training and get help from many local partners and service providers – [www.rushcliffe.gov.uk/selfserve](http://www.rushcliffe.gov.uk/selfserve).
- A marketing campaign with the strapline 'Don't stand in line – do it online' ran alongside this launch involving editorial, social media, posters, a leaflet in all council tax bills and an article in the residents' magazine.

### Working with partners

We work with many partners to give comprehensive support to customers who have a range of different needs including never having been online, disabilities, low

literacy and poor IT skills. Our partners are carefully chosen to help people get off benefits and into work. We seek new partners with new relevant services. In particular we bring together different agencies in a single front office to provide a single access point for customers. This includes JCP, CAB, the local college, a small business adviser, the Probation Service, a social housing provider a drug misuse clinic.

## Vulnerability

Both the council and Jobcentre Plus carry out surveys to find out why customers do not go online and if they have internet access and necessary skills. Surveys gain information about whether they have the mandatory bank accounts for UC.

## Challenges and solutions

- Sharing data – Partners need to share data about customers. However, there are many legal complexities, differing software and cultural differences between organisations about sharing information. The solution is to work together closely to overcome fears and differences and this will come with time.
- Getting to know how partners work – building partnerships takes time and commitment to get it right. Events help to strengthen relationships, knowledge and a shared vision.
- IT facilities for partners – for us to help integrate services we encourage our partners to work from our contact centre but to do that they need internet access so they can use their software systems. We are going to iron out all IT issues.
- Data security on self-service terminals – our terminals are linked to our core computing system so customers can't just openly browse or access their personal emails. However, customers must have email access to access Universal Jobmatch to find jobs. Other pilots have addressed this with open access. So, we plan to enable access to the common email sites.
- Our partners are not at the contact centre full time and so we needed to ensure continuity of the service when they are not present. Our customer services advisors have undertaken shadowing with Jobcentre Plus advisors at the local Job Centre and vice-versa to improve skills and knowledge.
- Culture shift – self-service is a culture shift for both customers and customer advisors. Advisors want to help customers, not get them to do it themselves. We have had to reassure advisors that by doing this we are helping the customer in the long run and freeing up their time for those that need them most.
- Awareness of UC – our surveys are showing that only 18 per cent of customers are aware that UC will require them to apply online – so there's still a big marketing awareness job to do.

## Top learning tips

- Moving people online takes time – about 12 months.
- Making partnerships work takes time and commitment to get it right.
- When co-locating partners, sorting out IT is essential.
- There is a cultural change required for both customers and staff in terms of moving to self-service.
- Only 18 per cent of customers we have surveyed so far are aware that they will have to apply for universal credit online.
- Don't assume everyone has a bank account for UC to be paid into and/or the money management skills to handle one monthly payment – you'll need to have somewhere you can refer these customers to for help (credit unions, banks and so on).

## Links to useful information

[www.rushcliffe.gov.uk/selfserve](http://www.rushcliffe.gov.uk/selfserve)

## Contact details

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# Case study

## Lewisham Council

### Objectives

To test the role that local authorities could play in providing a triage and orientation service under UC. The focus of our work so far has been to:

- develop an evidence based definition of vulnerability for transition and access to UC
- develop a triage mechanism for identifying and assessing individuals affected
- develop an approach for providing holistic and locally delivered face to face transition support service.

### About Lewisham

Lewisham is home to over 250,000 residents from a range of diverse communities, neighbourhoods and localities. The local population is forecast to rise to over 290,000 over the next twenty years. Currently there are over 130 languages spoken by different communities across the borough.

### Where are we now?

Lewisham used design methodology to develop an approach for working with vulnerable residents that integrates preparation for the benefit cap with preparation for UC. A pilot team has been set up comprising of officers from the council's housing benefit and housing needs teams

and Jobcentre Plus to design and then deliver the service.

The steps we followed were:

- **discovery:** we spent time in our AccessPoint and Housing Options Centre talking to people about Universal Credit and what they thought their barriers and support needs would be
- **defining and developing:** we took our insights to partners and colleagues in strategic and frontline roles and asked them to use this to define how we could triage and support people – we then developed an outline model based on our core insights
- **delivering:** we began to deliver the model with small groups of clients and iterated the process based on what we learnt.

#### Our model – phase 1

There are four high-level steps in the model we have developed:

1. A letter is sent to the customer explaining the key welfare changes and providing them with an estimate of the financial loss of the benefit cap.
2. The customer is contacted for a triage assessment over the phone, which focuses on skills and experience across the financial, digital, housing and employment spheres. The script built in our CRM system assigns scores to the answers given by the customer, which

then determines if they are considered 'vulnerable' triggering the need for a further support appointment.

3. A face-to-face appointment is conducted, initially taking the customer through an individual level calculation, focusing on the financial impact of the benefit cap and returning to work after the cap (weblink included below). The results from this bespoke calculator help to build the case for change and lead officers into the support segment of the appointment. This covers each of the four support areas in turn, identifying referral routes for each.
4. An individualised support plan is created with warm referrals to key agencies who will be responsible for providing on-going support tailored to the individual needs identified.

## Phase 2

We are now adding another step to the model that would offer additional support to residents that require more intensive support. Early learning from the pilot suggests that, while some customers will be able to make the transition to UC based on their support plans, there is also a cohort of customers that will require some more prolonged support. We are 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.

## Working with partners

The project governance established to oversee the pilot meets monthly and has representation from all key local authority departments (this includes housing, benefits, social care, employment development). VCS leads, JobCentre Plus and Housing associations are also members. Working groups have been established representing the same areas but at an operational level.

In addition, when making referrals for clients as part of their support plan the key partners we've worked with are:

- **financial:** Credit Union for budgeting accounts, CAB for debt/money management
- **employment:** JCP (universal jobs match/flexible support fund) and Lewisham's Family Budget programme which is part of our Troubled Families initiative
- **housing:** referrals to Lewisham's Housing Options Service
- **digital:** customers are directed to where they can access the internet (local libraries and so on) and sites where they can access IT training.

## Challenges and solutions

Providing holistic support of this type requires a fundamentally new relationship between the local authority and their residents. For frontline advisers this is a more difficult relationship in which they are asked to be an expert on more things, take more responsibility for making decisions and building up more partnerships across front-line services. There are some things that can be built into the model which will enable them

to do some of these things more effectively, however it remains the case that to do the role effectively staff need to be empowered to make decisions in partnership with the customer.

Scripted triage is good at identifying people who need 'transitional support' however it might not be flexible or intelligent enough to identify those who are likely to need more intensive, on-going support. One of the key reasons for this is that personality characteristics such as tenacity, drive and determination will be important factors in determining whether an individual will overcome their specific difficulties to transition to UC. These cannot be easily scripted and are much more easily identified in a face to face environment. This suggests that a layered approach to triage might be required.

## Top learning tips

The holistic model tested during the pilot has been effective in terms of enabling people to understand how universal credit will radically transform the relationship across digital, financial, housing and employment spheres. We believe that integrating housing and employment into local models is critical for the success of our approaches.

Face-to-face triage makes it easier to identify those who are likely to need on-going support.

## Links to useful information

Link to Lewisham's online support tool:  
<http://tinyurl.com/kfe9vx7>

Link to the Policy in Practice website (they developed our benefit cap calculator):  
<http://policyinpractice.co.uk/>

## Contact details

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# Case study

## West Lindsey District Council

### Objectives

The pilot is focussing on:

- supporting claimants to get online and budgeting support.

### About West Lindsey

The District of West Lindsey covers the area immediately north of Lincoln and forms the north-west gateway to Lincolnshire. Covering an area of 115,773 hectares, the district is predominantly rural and is the seventeenth most sparsely populated area in England with a population density of 77 persons per square kilometre. West Lindsey has a higher than average long-term unemployment rate and includes some of the most deprived and least deprived wards in the county.

### Where are we now?

- Digital inclusion and supporting customers to make claims online.

In January we introduced three new public access PCs in the Guildhall reception. These have direct links to the JSA online claim form, Universal Jobmatch, local training provision, learndirect, national careers service, Money Advice Service budgeting support and volunteering opportunities. This was supported by seconded advisers from JCP who have supported people with initial claims, and also looking for employment.

In May 42 per cent of people needed some support, 20 per cent needed intensive one-to-one support and 39 per cent needed no support. Reasons for requiring support include lack of IT experience, lack of confidence with IT or the claims procedure and literacy difficulties. However, the most common reason for accessing the support was to benefit from the face-to-face staff expertise.

From 26 March the council's housing benefit form has also been available online. This was initially tested in the Guildhall at Gainsborough and is now available at public access IT points in other locations. Agreement has been reached with Lincolnshire County Council's children's centres and libraries to support this. The IT is available and staff will be trained to provide basic support. In addition, local training providers are working to provide access to their IT for claims and job seeking activities and we are training community digital champions to support people within their vicinity.

- Financial Inclusion.

To support personal budgeting, the credit union operates from the Guildhall at Gainsborough every Tuesday to provide financial products and advice. We are also hoping to provide additional debt advice services through CAB. Local training providers are prepared to provide small group sessions on budgeting, however encouraging customers to access this support is a challenge. From July we will be holding

financial inclusion sessions – ‘Money Box’ – in partnership with a local housing association, Credit Union, CAB, local solicitors, and housing floating support. Customers will be able to talk confidentially about a range of issues relating to managing their budget.

## Working with partners

The council has established a steering group with an external Chair to provide strategic oversight. The steering group includes strategic partners such as DWP, CAB, Credit Union, RSLs, and a local vicar. A working group brings together the organisations involved in frontline delivery – including seconded JCP staff, Housing Associations, supporting offenders and it is encouraging that a local estate agent wants to get involved to bring the private landlord perspective.

The pilot has shown that working in partnership is key to the success of delivering digital and financial inclusion. Many organisations are concerned about how the introduction of UC may impact their customers and our open approach to partnership working through the working group and briefing and training sessions for partners has led to a large number of people coming forward to offer their support and to highlight issues for particular groups. Housing Associations are concerned about direct payments, but we are also working with domestic abuse services with regard to single household payments and funding for refuges, offender and ex-offender organisations regarding those who have been prohibited from using the internet and parish councils about supporting residents who live in rurally isolated communities.

## Challenges and solutions

In terms of delivery, the big issue is digital access in a rural area. Access to IT will be provided through a range of partners, with the council providing WiFi and computer hardware and communities providing a Community Champion to support local residents in accessing the internet and making claims. The pilot is working with the Localism Team and parish council network to identify suitable venues for IT and volunteer champions to provide the support.

## Top learning tips

- 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 on-line 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.

## Links to useful information

[www.west-lindsey.gov.uk/residents/benefits/universal-credit/](http://www.west-lindsey.gov.uk/residents/benefits/universal-credit/)

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# Case study

## Melton Borough Council

### Objectives

Melton's pilot aims to:

- get 50 per cent of working age claimants using digital services
- move twenty of our most complex cases into work
- integrate services to improve face to face access for the most vulnerable people.

### About Melton

- There are around 31,000 people of working age living in the Borough, of which 77.1 per cent are economically active.
- There are around 1,800 working age benefit claimants, so the pilot aims to get 900 of them using digital services.
- Customer insight work shows that 35 per cent of working age claimants are unlikely to self-serve; 26 per cent are likely to self-serve and 36 per cent are neutral.

### Where are we now?

- Melton is approaching UC within the context of the council's broader transformation programme.
- Mosaic Public Sector citizen classification used to help get a deep understanding of working age Housing Benefit and Council Tax Support (CTS) claimants.

- Also carried out a joint survey with Jobcentre Plus of JSA claimants to understand their digital needs.
- Biggest barriers to digital - poor connection (20 per cent), lack of access (19 per cent) and lack of skills / knowledge (15 per cent).
- Using Google Analytics to continuously monitor usage of web site and make improvements.
- Initiated a digital review of entitlement to CTS which is testing vast majority of working age benefit cohort with strong evidence available on take up.
- Campaign developed and tailored according to Mosaic predictions of likelihood to use digital services.
- First batch of 334 letters went out to the group identified as likely to self serve in May 2013 with the rest of the letters due to follow in June 2013.
- Within the first four weeks the first batch of letters had yielded 185 registrations (55.4 per cent) and 134 completions of the review process (40.1 per cent).
- At the same time we have launched our first small triage test around improved face-to-face access for lone parents in our children's centres. It is early days, but feedback suggests the quality of interviews has improved.
- We also tested a new approach to supporting financial independence. Referrals from a range of partners

allowed us to identify some of the most complex cases and after a detailed single assessment process we work with partners to put in place individually tailored support and mentoring.

- So far we have supported twelve claimants back into work.

## Working with partners

Parkside – a new multi-agency building – opened in 2011 brings together 10 partner organisations in one place with JCP due to join us in the autumn. Partnership working is central to the pilot and this has helped to encourage an ethos of information sharing and problem solving with a focus on better outcomes. The pilot has strengthened partnership working, with the focus being on a specific cohort of people.

## Challenges faced and solutions overcome

- Limited resources and conflicting priorities – overcome by aligning the aims of the pilot with the council's transformation programme so that the CTS service became the first focus for the programme to achieve a digital by default service/channel shift.
- Data quality standards to achieve systems integration – invested in data matching exercise which resulted in smooth issuing of letter to customers.
- There are skills issues with some parts of the cohort – liaising with partners to explore options for upskilling those who need it so that they can cope with digital services.
- Some people do not have access to digital devices – our communication plan has

ensured that we provide good information on all available public access points in the borough.

## Top learning tips

- Spend some time fully understanding the different segmentation groups within your cohort of working age benefit claimants.
- Make sure that data quality standards are in place between key systems.
- Spend time doing effective customer testing before implementation of new systems – avoids customer frustration if doesn't work and highlights early potential issues.
- 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 Jobcentre Plus, the county council and other partners.
- Link in with other key initiatives such as troubled families and children's centres.

## Links to useful information

[www.melton.gov.uk/advice\\_and\\_benefits.aspx](http://www.melton.gov.uk/advice_and_benefits.aspx)

## Contact details

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# Case study

## North Dorset District Council

### Objectives

- **Collaborative Work.** More integrated approach across public and voluntary agencies, North Dorset District Council, Stour Valley Revenues and Benefits Partnership, Spectrum Housing Association, JCP, volunteer Job Clubs, First Dorset Credit Union and the CAB.
- **Digital Inclusion.** To provide mediated support to online applicants both benefit and housing registration via Council and Public Access Points, home visits etc. to enable customers to develop skills to complete own applications.
- **Work Focus.** To improve links/data exchange between Jobcentre Plus and volunteer Job Clubs to help people into work. To develop better links to businesses for job vacancies.
- **Financial Independence.** To provide money management and welfare advice to those in the targeted areas and provide support to the First Dorset Credit Union.

### About North Dorset

North Dorset is a large rural area, 235 sq. miles with a population of 67,900. The area has limited or no public transport, the road system is poor and access to services is generally poor. Broadband access is limited or non-existent. Unemployment is low but wages are also low (92 per cent of GB figure)

and there is low educational attainment. High numbers of self-employed (with low incomes) and high numbers in part-time work means greater reliance on benefits. Many lack basic numeracy and literacy skills.

### Where are we now?

#### Digital Inclusion

25 per cent of households in North Dorset do not have access to Broadband. Many claimants with computers at home only use them for social activity and do not trust online banking, completing forms with personal information and so on. More basic IT training is needed to enable job search and benefit applications online.

More public access points with broadband connectivity are required in rural areas because of limited broadband availability. The access points need staff/volunteers who are trained and police checked to assist claimants. Our benefit claim form has been fine-tuned and now takes about 35 minutes to complete if you have reasonable IT skills. Verification is an issue and not knowing what documents are needed until you log into the system. Having to bring personal data concerns some people. Local libraries have agreed to extend thirty minute free IT usage to enable benefit claimants, job seekers etc. more time to apply online. Other organisations, town and parish councils are opening their offices for public use.

A high percentage of the most vulnerable will never be able to complete forms without assistance. There will always be a need for home visits for the most vulnerable – four per cent of the pilot – and this is expensive and time consuming in rural area. Only 10 per cent of claimants are applying for housing benefit online but nearly 95 per cent of applicants to the housing register apply online (this system has been in place for three years).

### **Work Focus**

Good working relationships with JCP has enabled us to improve access to work. However, there are limited opening hours and the location of JCP in the south of the district means access is a problem. The volunteer Job Clubs provide excellent support (although it is difficult for them to attract and retain suitable volunteers) and have helped 40 people into work in the pilot area. We need to do more to promote them. Small employers need support with HR and staff recruitment – but this has resource implications. We have encouraged local employers to take on staff. For example, Spectrum Housing Association is creating work placements through their 'Property Care' Division.

### **Financial Independence**

Money Management 'classroom' training was provided by Adult Learning with input from the First Dorset Credit Union. Encouraging people to participate has been resource intensive and non-attendance is a problem. CAB are providing 'one-to-one' money management advice but are finding that many individuals assisted with creditors arrangements etc. frequently require repeat assistance. First Dorset Credit Union needed time to develop their systems to enable 'jam jar' and direct debit accounts to be set up.

More claimants are now setting up accounts with small financial incentives.

### **Additional Findings**

- More numeracy and literacy 'skills for life' training is needed. Dependency on Food Banks is growing. We need to do more to promote donation to the Food Banks with clear information on the type of food needed.
- We need to promote First Dorset Credit Union (an advertising campaign has started) to direct people away from pay day loan companies etc. Commercial banks will limit the provision of basic bank accounts because there is no return for them.
- Need to provide more training in welfare reform to voluntary group and individuals to stop people receiving the wrong advice. More signposting to specialist agencies.
- Data sharing – all agencies hold data in different ways, many different agencies targeting the same groups. Need improved data sharing protocols.
- The financial downturn, high cost of fuel (cars are essential in rural areas) and oil (for oil fired heating where gas is not available) is having a serious detrimental effect on rural household budgets regardless of changes in welfare benefits.

## Top learning tips

- More contact with employers to create work placements, apprenticeships etc. More support to small businesses that lack HR and staff recruitment skills.
- More promotion and support to the First Dorset Credit Union, Food Banks and volunteer Job Clubs.
- More literacy, numeracy, IT and money management training needs to be provided.
- 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.
- Some vulnerable people will not engage and the risk is that they disappear from our radar.

## Links to useful information

[www.dorsetforyou.com](http://www.dorsetforyou.com)

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# Case study

## Oxford City Council

### Objectives

The overarching objectives for the pilot are:

- identify the barriers that prevent customers from entering work
- identify the options and solutions for assisting customers including the identification of partners with the skills to assist
- capture and record the learning through customer engagement.

### Background to Oxford

Oxford's population is estimated to have grown rapidly in the last decade to around 154,000 in 2010. It is in many ways a prosperous city and has a large student population, but also some of the country's most deprived wards. Nearly one-quarter of Oxford's children live in poverty and there is a 10-year gap in life expectancy between the north and south of the city.

### Where are we now?

The approach of the pilot is to provide support to customers affected by welfare reform that addresses all of their employment needs. We have appointed a Pilot Lead and four Welfare Reform Outreach Workers who will engage with customers.

We used existing research to identify some common barriers to people entering work, including:

- lack of child care
- health issues preventing work
- fear of the instability of entering work
- lack of skills
- debt.

We tested our understanding of local need with a selection of customers affected by either the social sector size criteria or the housing benefit cap. Customer feedback confirmed that these common barriers were experienced by our customers and that most had multiple barriers. We also found that people generally were very keen to engage with the council in overcoming barriers to work.

We are working with three organisations to support customers – Skills Training UK, JCP and CAB and are moving away from the traditional signposting model to one where the client is directly introduced to the organisation they are referred to.

Delivery starts with referrals to the pilot team, usually from the council's Contact Centre. We have briefed the Contact Centre staff and other council staff on a triage process and what factors might warrant a referral.

Once identified, the pilot team pro-actively contacts the customer to discuss their needs and options in more detail. This initial call

also includes a data check section where the customer's circumstances are reviewed for accuracy whilst potential exemptions from the welfare reform restrictions are investigated.

In most cases, where it is established that the welfare reforms will impact upon the customer, an interview is arranged with the aim of trying to fully understand the customer's needs, the barriers preventing them entering work and the solutions for removing those barriers. An action plan is agreed with the customer and where further needs are identified that another organisation is best placed to help address, we arrange a direct introduction and fully brief that organisation.

We keep in contact with the customer after they have received support and to discuss any other actions or support may be needed to continue to support the customer.

So far we have engaged 180 customers and are working on an on-going basis with 26 of those, of which four have moved into work. A further 16 cases have been referred to partner organisations, 14 have been referred as priority cases, 30 have received discretionary housing payments and all have received housing and/or work related advice.

## Working with partners

As well as the three organisations who we have commissioned to provide support at this stage in the pilot, we are also working with a number of other partners. In particular, we are working with Thriving Families (Oxfordshire's Troubled Families programme) who are providing some intensive support to customers affected by the social sector size criteria and the housing benefit cap.

## Challenges faced and solutions overcome

In response to the challenge of engaging people, we are developing a benefit calculator that will help our caseworkers to clearly demonstrate to customers the financial benefits of moving back into work.

## Top learning tips

- Most people face multiple barriers to getting into work. Addressing all of these needs delivers the best results, but it is resource intensive.
- Nearly everybody the council works with needs some sort of debt support or budgeting advice, but they often do not realise it. Some people need a nudge, others a lot of initial support and then they are independent, while some have on-going needs.
- Don't underestimate the volume of enquiries that are generated by welfare reform.
- The council's coordination role is crucial. Important that people are able to maintain a relationship with the council through a caseworker.
- People are generally willing to talk about what they are spending money on, but less willing to engage with organisations such as CAB. When working with partners, don't just signpost customers – personally introduce customers to the organisation and they are much more likely to take-up the support.

## Links to useful information

[www.oxford.gov.uk/PageRender/decCB/  
CouncilTaxandBenefits.htm](http://www.oxford.gov.uk/PageRender/decCB/CouncilTaxandBenefits.htm)

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# Case study

## Birmingham City Council

### About Birmingham

Birmingham is a large urban authority at the heart of the West Midlands region with a growing population of over one million. We have the youngest population of any major European city - over half the population is aged under 35. The ethnic make-up of the city is significantly more diverse than that of the UK as a whole, and that diversity is expected to increase significantly over the next 20 years. Birmingham is the largest city economy in the UK outside of London with a growing reputation as an international business location. Birmingham has significant levels of deprivation in some areas, and has fallen further behind other parts of the country in the last decade.

### Objective

- To give new council housing tenants access to digital technology to help them prepare for changes to welfare benefits and assist them in managing their new home.

### Where are we now?

The aim of the project was to track a customer's housing journey from start to finish, making improvements along the way and to take a digital by default approach by identifying nudging techniques to enable behaviour change.

All of the processes that a new tenant has to go through to obtain and maintain a tenancy were identified and mapped to improve the customer experience. This included the introduction of letting suites which supports new tenants from the time that they bid for their property to the end of the first 12 weeks of their tenancy. A triage process operates and any other issues that are identified such as debt, mental health, employment, domestic violence etc. enables referral of the tenant to other relevant agencies who can help with their specific circumstances.

New tenants are given their own personalised digital log book which is an online portal that helps tenants to manage every aspect of their own tenancies online. It is a one stop shop for everything to do with their tenancy from start to finish; from initial bidding for a property; to getting their keys and managing their property once they have taken up residence. It also helps tenants to manage and access their benefits online, helps them to manage their finances with simple to use budgeting tools, gain digital skills, access employment opportunities, view their council tax and rent statements, report repairs as well as access information on changes to benefits and much more. It also signposts them to other useful information and advice.

So far over 1063 people have been given a digital log book, and 88 per cent of these have been able to use it with support and encouragement from floorwalkers in the

letting suites. The digital log book has been built into the overall customer journey as part of the new housing process.

## Challenges and solutions

People with learning disabilities have required more support and there are some people who are unable to use the internet as part of their probation conditions. There is the facility that if an individual cannot utilise the log book for themselves then they can be classified as an advocate and operate the digital log book on their behalf by giving informed consent. We have highlighted that certain individuals cannot access the internet to DWP due to specific conditions being placed on them and that there will need to be an alternative process. Birmingham has also used interpreters to help people who have specific language issues.

Some of the comments from tenants on using the digital log book:

‘I like this as everything is in one place’

‘It’s quick and easy to use’

‘Better than making a phone call or visiting an office’

‘It allows me to deal with my tenancy queries from the comfort of my own home’

‘I found the budgeting tool very useful’

## Top learning tips

- That any claimant/customer journey is analysed with a digital first approach to identify nudging techniques which can be employed to enable channel shift and self-service to help people get ready for the introduction of UC’s digital approach.
- That time needs to be spent with the individual upfront to help them understand this approach and why it is important to get the digital skills with an emphasis on how they can be more in control of their own lives.
- That not everyone currently has an email address and time needs to be spent helping people to create their own email address ready for the introduction of UC.
- That language used when helping tenants to take on this digital approach is paramount to its success.
- That it is important that all staff who are involved in the process are trained and understand fully the reason the approach is being taken.

## Links to useful information

<http://www.homelogbook.co/digitallogbook/digitallogbook.html>

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Energy  
Advice



Letting Suite

ons of  
nancy

Online logbook in Bartley Green Letting Suite, Birmingham

# Case study

## Bath and North East Somerset

### Objectives

To test effective and simple ways to provide face-to-face support for those customers most in need.

### About Bath and North East Somerset (B&NES)

The overall population of Bath and North East Somerset is around 180,000 with approximately half of this number being located in the city area and the rest in surrounding rural localities. Whilst the City of Bath is relatively affluent, we have five neighbourhoods which are recognised as deprived areas and also a mixture of rural wealth and poverty.

### Where are we now?

The UC pilot builds upon B&NES Customer Access Programme which is about delivering public services and advice around life events, at the right place and right time. Having adopted a systems thinking approach to housing and council tax benefits B&NES we already encourage customers to use face-to-face service(s). At the same time we have removed the need for complicated forms and operate a mediated online solution. The pilot is taking the learning from this experience and widening it to all customers who will be affected by UC.

Our first challenge was to understand in detail why people were turning up at our One Stop Shop and explain what the proposed changes would mean to them in order to understand their readiness. We then developed a range of questions which enabled us to understand issues around three key principles:

- digital capabilities (IT Savvy)
- financial support
- employability.

The data we have gathered on this has helped us to focus on what is needed.

**Digital capability** showed us that around 80 per cent of customers would be willing to make a claim online; but through observation we consider that around 40 per cent of these would need additional support. We then asked how they used the internet and found that whilst most had internet access via mobile phones, only 50 per cent actually have access to a PC in their own homes.

**Financial Support** questions did reveal that most Benefit claimants are very good at managing their finances. However they do think they will struggle when the system moves to direct payments, monthly in arrears and they would like some budgeting advice and support. Initially we referred these people on to partner organisations but have quickly realised that people are not taking up this advice at this stage and that other methods may be required.

**Employability** has not been something we have normally dealt with directly as a council. So it has been invaluable to work alongside DWP colleagues and to address this issue at the same time. Again we have been asking a range of questions to understand what would help people in terms of finding employment, ranging from IT skills to help with CV writing.

We continue to collect this data from customers that turn up and we have grown the size of our project team to increase the numbers through this process. We have focussed our efforts on customers impacted by the size criteria changes and pending benefit capping changes. We have also been using a better off calculation to help advise customers of the advantages for taking up employment with a number of successes.

The staff from DWP and B&NES quickly realised there were things they could learn from each other. They have taken it upon themselves to arrange a staff exchange between the Jobcentre and Bath and North East Somerset Work Exchange Experiences. So that staff from both organisations spent half a day looking at the work that each other do. This helped to strengthen expertise, such as employability, for council staff.

We already operate a successful triage process in our One Stop Shop and this has been expanded in order to refer customers through to the project.

## Working with partners

B&NES already have a wide range of partners in their One Stop Shops, including HMRC, CAB, Age UK, Bristol Credit Union, Shop Mobility and others. The pilot has now enabled Jobcentre Plus to release a member of staff to work alongside their own project team to deliver a holistic solution relating to all component parts of the proposed Universal Credit model.

The team have now organised two workshops alongside other partners to explore how we can take some of these services out to the community. There are some valuable lessons learnt from these experiences.

Corporately we have started to explore the wider impacts of welfare reform. Through these conversations we have been able to link additional service providers in to the Pilot, instead of them forging their own links with DWP.

We have held a joint members workshop with our major RSL and Housing Services to update councillors on the operations and linked this into learning from the UC Pilot and our Local Welfare Support Team. This has been introduced as a single gateway to handle replacement of Social Fund and the increased DHP fund administration, with clear links and referrals in to the UC Pilot.

As a result of the pilot we have increased our engagement with partners, who play a key role supporting customers, including the National Careers Service and the Money Advice Service.

## Challenges and solutions

The challenges for us relate to three key areas – digital capability, financial advice, and support and employability.

We have started to map the availability of Public Access PCs across the B&NES area and are finding a surprisingly high number of access points that we can refer people to.

We are 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.

The workshops we are holding include an element for helping develop IT skills and confidence. We are also investigating other ways of providing IT training and support.

For JSA claimants we are enabling self-serve opportunities in our One Stop Shops and are pleased that locally we now have 80 per cent take up for JSA by this method. We are learning that by being available but not standing over people's shoulders they will attempt to complete the form themselves. But if you remain permanently available they will rely on your support, so there are some soft skills to this approach.

The UC pilot identified an early challenge around encouraging people to take-up personal budgeting support. Analysis of the customers revealed that a significant number of people were carers and in receipt of employment and support allowance. To address this gap in claimant coverage the UC pilot was promoted specifically to these groups using existing communication channels, such as the Carers Centre Newsletter.

We do have a wide range of partners we can refer customers onto and we are in the process of supporting a review into the Council's wider commissioning role for this purpose.

## Top learning tips

- The best times to resolve a customer's issues is when you have them in front of you, by getting it right first time. Joining up services around the life event will save money and improve service.
- Having access to the right partners in one place enables the best possible outcomes. For UC we would recommend that all face-to-face meetings happen in a combined location.
- Take practical steps, such as staff exchanges, to encourage council and JCP staff to be fully aware of the breadth of each other's expertise.
- Map and brief the different agencies who work with people who will be impacted by UC.
- Be aware of the soft skills required to support someone with self-serve solutions.

## Links to useful information

[www.bathnes.gov.uk/services/council-tax-benefits-and-grants](http://www.bathnes.gov.uk/services/council-tax-benefits-and-grants)

[www.bathnes.gov.uk/services/council-tax-benefits-and-grants/benefits/benefits-changes-community-workshops](http://www.bathnes.gov.uk/services/council-tax-benefits-and-grants/benefits/benefits-changes-community-workshops)

[www.bathnes.gov.uk/services/council-tax-benefits-and-grants/benefits/welfare-support-scheme](http://www.bathnes.gov.uk/services/council-tax-benefits-and-grants/benefits/welfare-support-scheme)

[www.bathnes.gov.uk/contact-us/bath-one-stop-shop](http://www.bathnes.gov.uk/contact-us/bath-one-stop-shop)

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## Annex A – Direct Payment Demonstration Pilots

In January 2012 the Department for Work and Pensions established a programme of six Direct Payment Demonstration Projects to test the direct payment of Housing Benefit.

They are:

- Oxford
- Southwark
- Shropshire
- Torfaen
- Wakefield
- Edinburgh

Under the present system, Housing Benefit for social rented tenants is usually paid directly to the landlord. However, from October 2013, the process of rolling-out direct payments to all HB recipients will begin as part of the new Universal Credit.

DWP has published learning from the pilots on its website:

[www.dwp.gov.uk/docs/direct-payment-demo-figures-may-2013.pdf](http://www.dwp.gov.uk/docs/direct-payment-demo-figures-may-2013.pdf)



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