

Maximising Incomes & Outcomes

A 3 Year Plan for Improving the Uptake of Benefits



An Agency within the Department for

**Social
Development**

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FOREWORD

Minister for Social Development, Nelson McCausland



I am pleased to bring forward Maximising Incomes & Outcomes, my Department's 3 Year Plan for improving the uptake of benefits in Northern Ireland. As Minister for Social Development I have ensured that the role of social welfare and the uptake of benefits by vulnerable groups are to the fore in my Department's policies aimed at tackling poverty and disadvantage and making a positive impact on the Northern Ireland economy. One of my first actions in office in the summer of 2011 was to allocate additional funding to the Benefit Uptake Programme of work. I am pleased that this additional investment delivered results, more than trebling the amount of additional annual income generated for more than treble the amount of people from the previous year's efforts, with £13.1million shared between just over 4,000 people, most aged 60 and over.

I want to continue this work and to make an even greater difference to people's lives.

There is no doubt that the challenges presented by the current economic context are significant and these pressures continue to be felt in people's homes across Northern Ireland. This is evident; not only from the statistics, but from the many face to face conversations I have with people as I travel across Northern Ireland on a weekly basis.

Rising costs, fuel prices in particular, alongside steadily increasing food bills, means that there has never been a more important time for us to ensure that all efforts are made to optimise household incomes through take up of benefits for those most at risk of poverty at stages in their lives when they most need that financial support.

The continuing welfare reform agenda will reshape the entitlement framework and whilst I am confident that this will offer opportunities for many to improve their incomes by making work pay; I believe that the time is right to ensure that our vision of full uptake of benefits, along with other services and supports, by those for whom work is not an option, is realised.

My Department cannot realise this vision alone. It requires co operation and collaborative effort across government and from all those with an interest in economic growth and social welfare across Northern Ireland.

The support emerging from the consultation that took place in developing this Plan has validated my view that everyone, across all sectors in Northern Ireland, wants to work with us in delivering the Maximising Incomes & Outcomes vision "that every individual and household across Northern Ireland is receiving all social security benefits to which they and their families are entitled."

I look forward to realising this vision, through a very wide range of partnerships and commit to publishing annual updates setting out our progress.

Nelson McCausland

Nelson McCausland
Minister for Social Development
July 2013

2.0 BACKGROUND

2.1 Consultation

Pre-Consultation

A pre-consultation exercise was conducted during the summer of 2012. It involved a series of one-to-one meetings with key third sector organisations with a direct interest in this area, most of which have been involved in helping the Department develop and improve benefit uptake approaches since 2005.

The discussions and written submissions received were useful in the development of the draft Plan. The Department was encouraged that all those consulted expressed clear views that the current range of approaches are making a difference and should continue, with a range of suggestions for development.

Public Consultation

A formal public consultation was launched by Minister McCausland on 20 December 2012. This ran until 26 February 2013. Interested parties were encouraged to put their views to the Department on any and all issues around benefit uptake and specifically on continued investment, vision, aims and targets and importantly the six strategic priorities for action set out in the Maximising Incomes & Outcomes discussion document.

More than 80 people attended public meetings, further one-to-one consultations took place with key stakeholders who requested it and 31 written responses were received.

The Maximising Incomes & Outcomes Consultation Report has been published on the Department's website. The views expressed and issues raised were very useful to the Department in finalising the Plan.

Reporting

The Year 1 Programme has been published alongside this document. Maximising Incomes & Outcomes will be iterative, given the Department's commitment to a longer-term strategy and ongoing work to improve the evidence base. Annual updates will be published as key phases of work are complete.

2.2 Policy Context

Priority 2 of the Northern Ireland Executive's 2011-2015 Programme or Government¹ "Creating Opportunities, Tackling Disadvantage and Improving Health and Wellbeing" sets out a commitment to delivering a range of measures to tackle poverty and social exclusion.

The Executive, through the office of the First and deputy First Minister (OFMDFM), working with all other departments, is committed to addressing poverty; through a suite of inter-related programmes in the context of the long term Delivering Social Change Framework.

The Department for Social Development's contribution is to provide fit and affordable housing and combat fuel poverty, to regenerate deprived areas, deliver effective child maintenance arrangements and to transform the welfare system.

Social security benefits provide a critically important safety net for the vulnerable and those in most need. For the year ended March 2012 expenditure on social security benefits was more than £4.4 billion².

The Department is committed as one of its actions to address poverty, to contacting 25,000 existing social security benefit customers in each year of the Programme for Government, to offer a full and confidential benefit entitlement check.

Building on that commitment, this document, Maximising Incomes & Outcomes - a 3 Year Plan for Improving the Uptake of Benefits, sets out a further important Executive pledge, under Priority 2 of the Programme for Government, to improve the uptake of benefits by people who need them.

The root causes of poverty are complex and multifaceted and the Department, alongside other Executive partners, plays an important role, as set out above, in delivering a range of social policies to address these.

It is not suggested; therefore, that improved, or even full uptake of benefits, will eradicate poverty. For most individuals and families of working age, improving their income, mitigating the risk of poverty and improving life opportunities will always be through work, not out of work benefits. In that context, the Executive seeks, through the Economic Strategy, Delivering Social Change and the Welfare Reform agenda, to increase skills, improve levels of participation in the labour market and to ensure that people of working age are better off in work.

Delivery of the welfare reform agenda will provide opportunities for improved incomes and outcomes for working age individuals and families. Those of pension age are much less likely to be able to improve their income levels through participation in the labour market. Improved uptake of benefits can therefore have a more significant impact on pensioner poverty. It is anticipated that planned pension reforms will have a positive impact on pensioner poverty.

2.3 Vision and Aims

The vision of Maximising Incomes & Outcomes, a 3 Year Plan for Improving the Uptake of Benefits in Northern Ireland is:

That every individual and household across Northern Ireland is receiving all social security benefits to which they and their families are entitled.

The related aims are:

To ensure that, **within the framework of entitlements that exist at any given point**, all those with potential entitlement:

- **are aware of the full range of social security benefits which exist to address their needs;**
- **have access to the right information and support to make an informed choice about making a claim;**
- **are signposted to a range of additional, relevant, benefits, services and supports; and**
- **can make a claim easily (with encouragement and support, where required).**

3.0 THE BENEFIT UPTAKE PROGRAMME 2013-2016

The Department will continue to prioritise and invest resources in proactive programmes and activities aimed at encouraging the uptake of benefits, services and supports. A minimum investment of around £3million is anticipated over the period of this Plan.

People in all circumstances who find themselves in need will be included in benefit uptake programmes of support. As the available evidence emerges, those groups identified as being most vulnerable to poverty and likely to have unclaimed entitlement to income or health / disability related benefits will continue to be the focus of higher investment levels and direct targeting interventions.

Groups identified for direct targeting may change over the 3 year period as more precise estimates of unclaimed entitlement and new targeting methodologies emerge from the work being undertaken by the Benefit Uptake Advisory Group to improve the evidence base. The Benefit Uptake Advisory Group has brought government and independent research expertise together to advise on and identify new and valid benefit uptake methodologies. Membership of the group includes the Joseph Rowntree Foundation, the Institute for Social & Economic Research, the Institute of Fiscal Studies, the Centre of Excellence for Public Health Northern Ireland and the Atlantic Philanthropies.

Investment in benefit uptake activities will remain additional to the Department's "business as usual" awareness raising and provision of customer information on the full range of benefits which exist to support them. These include a wide range of benefit specific publications; clear user friendly information on the NI Direct website; an online Benefit Advisor (calculator) through which people can carry out their own entitlement checks; and general assistance with advice and information, including full benefit entitlement checks delivered by telephone and face to face through the network of 35 local offices across Northern Ireland.

Investment in benefit uptake will also continue to supplement and complement front-line benefit information and advice services delivered under contract by others on behalf of the department.

These services include benefit information and advice (including housing advice), advocacy and appeal representation across Northern Ireland. Annual funding allocated to this work up to March 2015 is approximately £4million.

The Department will ensure that linkages are made with other government departments and agencies and with third sector organisations to maximise incomes and outcomes. Actions will be delivered in the context of clear linkages to related Executive policies and strategies within the Delivering Social Change agenda, including the Department's Housing and Fuel Poverty strategies, Child Maintenance Reform, Reform of Adult Care and Support, Transforming Your Care and the emerging Disability and Active Ageing strategies.

Full benefit entitlement checks delivered by the Social Security Agency and its contracted partners will not only assess entitlement to social security (including Housing) benefits but also to a range of wider benefits, services and supports. Examples include rates reliefs, concessionary fares, the Blue Badge Scheme, the Boiler Replacement, Warm Homes and Affordable Warmth Schemes, Debt Advice and free dental and optical treatment. It is therefore anticipated that the successful delivery of this Plan may result in a consequential increase in the uptake of linked benefits, services and supports aimed at households on low incomes or experiencing health problems. The potential also exists for additional positive impacts relating to social inclusion, health and wellbeing in a wider sense.

Given the continuing higher levels of fuel poverty being experienced in Northern Ireland, compared to the rest of the UK, we will ensure that household income levels of all those at risk of fuel poverty is optimised through benefit uptake and that all those potentially eligible are encouraged to seek home energy efficiency support and assistance. Benefit entitlement checks will continue to be a key element of the prevention theme of the Fuel Poverty Strategy and as part of the pilot Area Based Approach to Fuel Poverty.



4.0 STRATEGIC PRIORITIES

The Department will prioritise investment in the following 6 broad areas for action to improve the uptake of benefits over the 3 year term of this Plan.

1. Improving the evidence base
2. Better targeting
3. Improving access and delivery
4. Responding at key life changes
5. Strengthening partnerships
6. Encouraging innovation

4.1 Strategic Priority 1: IMPROVING THE EVIDENCE BASE

Estimating unclaimed entitlement

There is currently no more robust or statistically valid methodology for estimating the uptake of benefits than that offered by the Family Resources Survey (FRS). The last available estimates and other modelled estimates based on FRS data³ produced for the Department as part of an independent Strategic Review of Benefit Uptake in 2008/09, will continue to inform the development of benefit uptake approaches as we improve the evidence base. People in all circumstances will be encouraged through advertising, promotional and outreach methods, to review their benefit entitlement position at any stage. A focus will be given to more direct targeting of specific customers identified from existing and emerging data sets available to the Department and those customer groups and areas identified in FRS and the Strategic Review Report as being less likely to take up their entitlement to customers groups benefits –

i.e. those with potential entitlement to State Pension Credit, Attendance Allowance and Carer's Allowance.

In the context of the Department's commitment to develop a longer term strategy the need for more specific evidence and valid uptake estimates remains critical. As part of its commitment to identifying alternative methodologies for producing estimates to inform uptake strategies and to help set targets for the future, the Benefit Uptake Advisory Group has been established. First findings from the Group are expected in summer of 2013.

Uptake Approaches

There is evidence to suggest that direct targeting, advertising and community level promotion and engagement are effective methods of reaching people, especially when delivered together in a "layered" approach. Working better across government, particularly at health related interventions, as well as with a wider range of community based partners will improve outcomes; and, where form completion remains the main or only method of claiming, face to face assistance with making a claim improves outcomes, especially for older people and those living with disability, particularly mental ill health.

Addressing the Barriers to Uptake of Benefits

A range of evidence exists to suggest why people do not claim benefits to which they may be entitled. Many people, even when contacted directly by letter and follow up telephone calls, make conscious decisions not to take up the offer of a free and confidential entitlement check. Others, having had an entitlement check which has identified the potential for new or additional benefits do not go on to make a claim. This Plan will seek to improve response rates.

All benefit uptake approaches to be taken forward over the 3 year period of this Plan will be designed and delivered with input from a wide range of third sector partners and stakeholders who have an influence in relation to claiming behaviours in an effort to addressing the main identified barriers (both perceived and real) to benefit uptake:

- **belief that one is not eligible;**
- **fear of complexity; forms and/or evidence requirements, claiming incorrectly;**
- **lack of awareness and understanding of own needs;**
- **concern that receipt of some benefits may impact on other benefits received;**
- **pride and values: desire to remain independent, feel they have sufficient income to live on, are “better off” than others who may need it more, don’t want state support, believe money could be better used in health or education;**
- **belief that the amount to be gained is too low and not worth the effort (see complexity) to secure it;**
- **the (perceived) social stigma attached to receipt of benefits; and**
- **trust: belief that it is better to have independent advice.**

Evaluation of Outcomes

We have learned that actual outcomes achieved for people are much wider than the amount of money reported annually. Only fully validated new or adjusted claims to social security benefits, Housing Benefit and Rates Reliefs are reported. In the absence of data sharing powers, no monetary value is placed on other benefits and the wide range of additional services and supports gained by people as a result of benefit uptake programmes. This is best evidenced in the “Make the Call” advertising campaign where almost 40% of callers had entitlement to at least one benefit, service or support identified from a comprehensive benefit entitlement check. The successful claim outcome reported was 8.5% as only social security benefits, Housing Benefit and Rate Relief outcomes could be fully validated.

Strategic Priority 1: OUR COMMITMENT TO IMPROVING THE EVIDENCE BASE

- **We will use the findings and recommendations emerging from the Benefit Uptake Advisory Group to design future approaches to improving uptake of income and health related benefits;**
- **When improved evidence relating to entitled non recipients of all benefits is available we will set specific and challenging targets aimed at reducing the gap; and**
- **We will improve the evaluation of benefit uptake programmes so that wider benefits and outcomes are reported.**

4.2 Strategic Priority 2: BETTER TARGETING

Direct Targeting

The Department believes in continued direct targeting. The value for money from this approach continues to exceed all others. In 2011/12 every £1 spent generated an additional £11 for customers and direct targeting outcomes made up £7.1million of the overall £13.1million in additional benefits generated for over 4,000 people. However, the Department aims to improve outcomes further by using recently secured access to a very comprehensive range of data from Her Majesty's Revenue and Customs (HMRC) and by sharing data sets with other government departments.

Data Sharing

Where legal authority to use data, other than that held by the Department exists, these opportunities will be used to improve targeting. Optimal use will be made of the data emerging from legal gateways which have recently been opened up as well as others expected as a result of the Welfare Reform Bill in 2013. Where legal gateways do not exist but opportunities are identified, the Department will continue to identify other methods of optimising impact through cross departmental collaboration and pooled resources. Examples include; securing customer consent to have the minimum required personal data shared with the Department for the purposes of benefit uptake when other interventions are being delivered i.e. the Maximising Access in Rural Areas (MARA) project aimed at alleviating the impacts of rural poverty and social exclusion; and working with Land and Property Services to reach single women over 75 living alone, due to the fact that they are often twice as likely to live in poverty. This methodology could be particularly useful in targeting for health related benefits and will be explored in Year 1 of delivery of this Plan.

Significant progress has been made in relation to securing additional data for targeting purposes in the last year.

The opening of a new legal gateway has allowed the Department to acquire a large range of income and related data from Her Majesty's Revenue and Customs (HMRC). The data includes all income from tax credits, earnings and savings. The Department has undertaken work to develop a Northern Ireland Household Incomes Administrative Database.

The database will be achieved by merging all current social security benefit data with the available HMRC data, a complex task.

This is a highly significant development in the area of benefit uptake which will soon allow income levels to be estimated for all households in Northern Ireland.

Strategic Priority 2: OUR COMMITMENT TO BETTER TARGETING

- We will directly target a minimum of 25,000 existing customers annually, with the offer of a full benefit entitlement check;
- We will supplement this with a range of indirect targeting approaches to include advertising and promotion;
- We will use data from the emerging Northern Ireland Household Incomes Database to improve the direct targeting of these customers with potential entitlement to means tested benefits from 2013;
- We will offer a full benefit entitlement check to all households identified in any new area based approach to fuel poverty (Warmer Healthier Homes);
- We will further develop the design and delivery of direct and indirect targeting and outreach activity with key representative organisations to better address identified barriers to uptake of benefits; and
- We will deliver new approaches to reaching carers in partnership with key carer's organisations.

4.3 Strategic Priority 3: IMPROVING ACCESS AND DELIVERY

The Department has successfully implemented a range of projects aimed at improving access. Examples include using, where it is available, existing customer data and information to populate and automatically move people from working age benefits to pension age benefits.

The delivery of pension age benefits has been transformed in relation to access and delivery. At the end of a claim to State Pension assessment of entitlement to State Pension Credit is made and the customer is transferred to make a claim. The time taken is on average around 11 minutes and the customer's voice is recorded as their "signature", removing the need for a form to be issued.

In a further service development, and cross government working, at the end of a claim to State Pension Credit potential entitlement to Housing Benefit and Rates Relief is made. Where potential entitlement exists, the information already gathered is used to populate claims for both benefits and the data electronically transferred to the Northern Ireland Housing Executive or Land and Property Services on the customer's behalf.

Local and centralised benefit branches deploy stakeholder engagement and outreach approaches to ensure staff understanding of the issues faced by customers in relation to access and in representing their circumstances at claims stage. This is supported by an ongoing programme of work on continuously improving our research base and gaining relevant customer insight to give the Department a better understanding of its benefit customers, in order to shape policy, guide service development and assist operational delivery.

The Department is working in a rapidly changing business environment. Rising customer expectations, planned welfare reforms, innovations in technology and the impact of the current economic climate are impacting on how services are delivered.

A new Customer Contact Strategy is being finalised. It is anticipated that facilities to carry out self-service transactions online will be made available including the option to do so within local offices. Customers will be able to obtain information on other departmental or government services and where appropriate carry out transactions relating to these other services on a self-service basis. This will ensure greater flexibility for customers and make their gateway to government services a much smoother experience.

The Department will continue to upgrade the tools and supporting technologies which underpin the range of benefit access methods, including web-based access. All benefit information, including leaflets and posters and the majority of application forms are available on the NI Direct website.

For those benefits (Attendance Allowance, Disability Living Allowance and Carer's Allowance) that still require form filling, face-to-face assistance with making a claim will be available to those who require it. In parallel, options for removing the need for form filling will be explored.

When home visits to vulnerable customers are being carried out for reasons other than benefit uptake, a full benefit entitlement check will be offered.

Delivery

There is evidence that communication with older customers and those living with a disability, particularly mental ill health, could be improved. Delays in processing benefits for those leaving prison or care could also be avoided through closer working with a range of partner organisations to address communication methodologies and barriers relating to evidence gathering.

Strategic Priority 3: OUR COMMITMENT TO IMPROVING ACCESS AND DELIVERY

- We will further develop the community outreach approach to ensure that home visits for the purposes of assisting with making a claim are targeted at those most vulnerable and that all other access channels are optimised to provide quicker outcomes for customers and best value for money;
- We will explore options for improving the claim making process for Attendance Allowance and Carer's Allowance;
- We will work with a range of partners to review the effectiveness of written communications with older people and those living with disability, particularly mental ill health;
- We will explore with one partner organisation opportunities to develop new ways of receiving, authenticating and forwarding evidence to complete some claims to Employment and Support Allowance;
- We will work with stakeholders to improve staff awareness levels in relation to access and communication issues faced by key customer groups; and
- We will, in the welfare reform and changing entitlement context, provide assistance to those making transitions within the benefits system, to ensure that the most vulnerable have access to a benefit entitlement check, support with re assessment and claims making.

4.4 Strategic Priority 4: RESPONDING AT KEY LIFE CHANGES

There is a clear need for intervention at critical life events as people's circumstances and potential entitlement to benefits change regularly. For many, wider services and supports are required at these times, often for the first time. Disallowance of an existing benefit can also dramatically reduce household income levels. We will aim to ensure that when people's circumstance change they are made aware of new or additional benefit entitlement.

The Department, through the Inter-Departmental Group on Benefit Uptake aims to achieve integration of uptake approaches in policy making and delivery across government.

More effective collaboration, particularly in relation to addressing the link between health and income inequalities, is a high priority. Building on the successful MARA delivery model, the Department will work across government and with other agencies to ensure that, when people are entering or leaving hospital, care, or prison; are diagnosed or living with life limiting or chronic conditions, find themselves in debt, are making choices about applying for or taking up a job offer, facing redundancy; requiring help with the cost of school uniforms or meals, we are joined up and co-ordinated in our approaches and response to individual need and that, as an absolute minimum, practical referral mechanisms are in place so that financial and other support can be accessed.

Strategic Priority 4: OUR COMMITMENT TO BETTER INTERVENTION AT KEY LIFE CHANGES

- We will develop processes to ensure that the offer of a full benefit entitlement check is given to all customers at key interventions with the benefits system, for example, reporting in financial crisis, with a significant change in circumstances, and/or no longer meeting the qualifying conditions for a key benefit; and
- We will work across government to trial a number of partnership projects to ensure that people at key life changing events or transition points in their lives are offered a full benefit entitlement check with practical referral mechanisms and follow up in place to make sure vulnerable customers' needs are met.

4.5 Strategic Priority 5: STRENGTHENING PARTNERSHIPS

It is evident from benefit uptake approaches to date that community level partnerships are key levers in reaching people with benefit entitlement. External advice sector partners have been effective in co-delivery of benefit uptake approaches. Whilst data protection limitations to their role remain; and almost a quarter of those directly targeted in the 2011/12 Benefit Uptake Programme chose to come to the Department directly, the Department's use of independent advice sector partners and a range of "trusted faces" who have the capacity to affect claiming behaviours will remain important to the direct and indirect targeting approaches to improving benefit uptake.

Recent work with non-advice partners has proven to be effective. The Department will seek to expand and develop further the range of non traditional advice sector and community level partners with which it works to improve benefit uptake. There are clear benefits to be gained from

working with civic, church and faith based and other community level partners who are already engaging (for reasons other than benefits and advice) with people whom the Department wishes to reach for benefit uptake reasons. The role of these organisations in influencing behaviours is seen as important.

Strategic Priority 5: OUR COMMITMENT TO STRENGTHENING PARTNERSHIPS

- We will increase the number of community based partnerships in place to promote the uptake of benefits;
- We will support MLA's constituency offices, councils and community partners to ensure that they have access to promotional benefit uptake materials, to establish effective referral mechanisms for benefit entitlement checks and to offer awareness and clinic type support for those who need them;
- We will work with government and third sector partners to ensure that key messages are communicated and uptake of all government benefits, services and supports are encouraged at community locations across all council areas;
- We will carry out annual tracking research into awareness and attitudes to claiming benefits; and
- We will implement the learning from current collaborative approaches with the Public Health Agency and the Department of Agriculture and Rural Development.
(The MARA Project)

4.6 Strategic Priority 6: ENCOURAGING INNOVATION

The Department, with input from the Atlantic Philanthropies, has recently trialled a number of innovative approaches to improving benefit uptake. £375,000 was allocated to 7 projects to test a range of fresh and new approaches on a pilot basis as part of the 2011/12 Benefit Uptake Programme. The Innovation Fund, as a concept and a tool for developing new approaches has been valuable, with a number of lessons learned from the evaluation. Outcomes and findings are being taken into consideration in the design of benefit uptake approaches, the need for early access to advice services and the criteria for a future Innovation Fund.

Strategic Priority 6: OUR COMMITMENT TO ENCOURAGING INNOVATION

- We will, in partnership across government, offer opportunities to community level partners to demonstrate success from innovative approaches which not only test new methodologies but which build on and develop further those already evidenced; and
- We will incorporate successful elements from the Innovation Fund pilot into future approaches to benefit uptake.

5.0 HIGH LEVEL TARGETS

We will secure at least £30million in additional benefits for a minimum of 10,000 people by 2016.

We will achieve this by:

- **directly targeting a minimum of 75,000 people with the offer of a full benefit entitlement check;**
- **increasing the direct targeting response rate by at least 10% on the current baseline of 42%; and**
- **increasing the number of claims submitted by those for whom potential new or additional entitlement is identified by 10% on the current baseline of 39%.**

6.0 KEY PRINCIPLES UNDERPINNING DELIVERY

The key principles underpinning delivery of this Plan are:

- **dignity: people will be made aware of and given access to the benefits to which they are entitled in a way which promotes their rights, respects their dignity and recognises any limitations in their understanding of the benefits system and their own needs;**
- **privacy: people will be able to access and claim benefits in confidence with their right to privacy respected;**
- **fairness and equity: people will have equal access to information, access channels and support with all staff and partners involved committed to positive action to address inequalities;**
- **outcome focused: investment in benefit uptake approaches will be made in a context where we seek to maximise overall outcomes for people and also to ensure that value for money continues to be achieved i.e. more is generated for people than the amount required to generate it;**
- **flexible and adaptable: the development of annual programmes of work will ensure that the plan is flexible to adapt and respond to changing economic and social welfare circumstances, emerging evidence and related executive priorities and strategies; and**
- **working together: it is accepted that government and community partners must work together to deliver the outcomes anticipated.**

APPENDIX 1

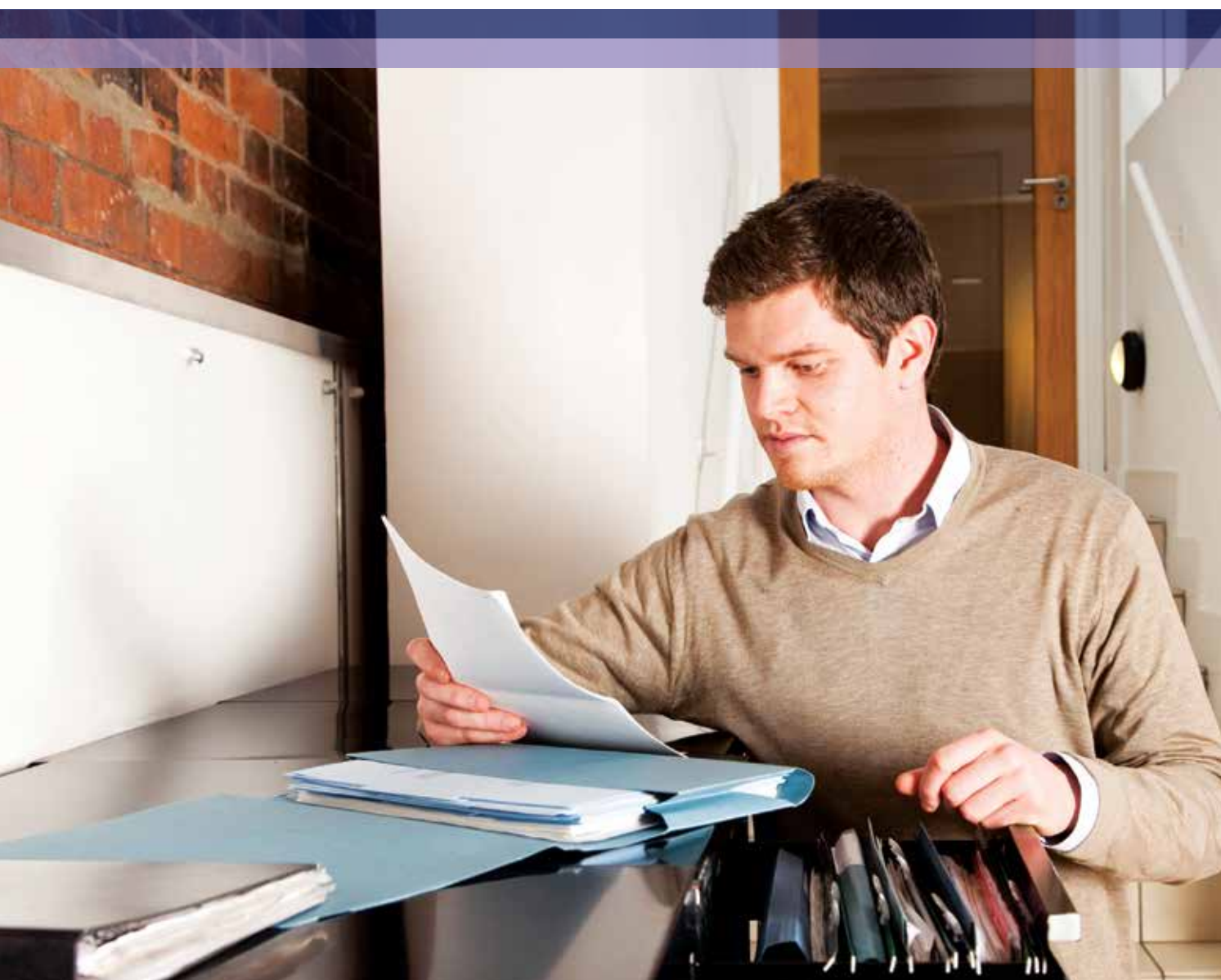
OUTCOMES FROM BENEFIT UPTAKE PROGRAMMES 2005 TO 2012

Year	Direct/ Indirect	Customers Targeted/ Engaged	Older People Targeted/ Engaged	Annual Benefit Generated	Over 60s Total Annual Benefit Generated	Total People Benefiting
2005/ 2006	Direct Target Exercises	3,746	3,746	£977,493.82	£977,493.82	385
2006/ 2007	Direct Target Exercises	20,822	19,942	£6,603,955.76	£6,324,852.84	1,174
2007/ 2008	Direct Target Exercises	22,454	9,586	£6,592,316.63	£2,814,373.71	2,491
	Indirect: Mail Shot	277,294	246,925	£7,692,398.24	£7,453,822.75	
2008/ 2009	Direct Target Exercises	24,829	18,275	£5,712,476.78	£4,571,695.17	3,960
2009/ 2010	Direct Target Exercises	25,274	20,431	£6,046,829.11	£4,684,209	1,919
	Indirect: Community Level Outreach ⁴	279	279	£78,557.99	£78,557.99	
2010/ 2011	Direct Target Exercises	18,973	18,034	£3,704,210.03	£3,638,319.39	1,358
	Indirect: Community Level Outreach Programme	636	636	£246,994.40	£246,994.40	
2011/ 2012	Direct Target Exercises	25,028	22,162	£7,168,342.42	£6,347,483.01	4,093
	Indirect: Community Level Outreach Programme	1323	1323	£316,760.14	£316,760.14	
	Make the Call advertising/promotion	13,970	13,970	£3,279,210.98	£3,279,210.98	
	Community Outreach Service ⁵	6,456	not available	£2,321,771.45	not available	
Totals	Direct	141,126	112,176	£36,805,624.55	£29,358,426.94	15,380
	Indirect	299,958	263,133	£13,935,693.20	£11,375,346.26	
	Overall	441,084	375,309	£50,741,318	£40,733,773	

Targeted exercises	Customers targeted	Older people targeted	Over 75s targeted	Percentage of over 75s	Benefits	Total annual benefit generated	Over 60s annual benefit generated	People Benefitting (targeted ex. + indirect targeting)
2005/06	3,746	3,746	Information not available	N/A	Pension Credit	£977,493.82	£977,493.82	385
2006/07	20,822	19,942	15,998	80.22%	Attendance Allowance, Carers Allowance, Disability Living Allowance, Pension Credit	£6,603,955.76	£6,324,852.84	1,174
2007/08	22,454	9,586	2,374	24.77%	Attendance Allowance, Carers Allowance, Disability Living Allowance, Incapacity Benefit, Income Support, Pension Credit	£6,592,316.63	£2,814,373.71	2,491
2008/09	24,829	18,275	4,959	27.14%	Attendance Allowance, Disability Living Allowance, Pension Credit	£5,712,476.78	£4,571,695.17	3,960
2009/10	25,274	20,431	11,392	55.76%	Attendance Allowance, Disability Living Allowance, Pension Credit	£6,046,829.11	£4,684,209.00	1,919
2010/11	18,973	18,034	12,136	67.30%	Attendance Allowance, Carers Allowance, Pension Credit	£3,704,210.03	£3,638,319.39	1,358
2011/12	25,028	22,162	19,309	87.13%	Attendance Allowance, Carers Allowance, Pension Credit	£7,168,342.42	£6,347,483.01	4,093
Direct Targeting Totals	141,126	112,176	66,168	58.99%		£36,805,624.55	£29,358,426.94	15,380

INDIRECT TARGETING

Mail-shots/Out reach	Customers targeted	Older people targeted	Total annual benefit generated	Over 60s annual benefit generated
Mail-shots 07/08	277,294	246,925	£7,692,398.24	£7,453,822.75
Community Level Outreach ⁷ 09/10	279	279	£78,557.99	£78,557.99
Community Level Outreach 10/11	636	636	£246,994.40	£246,994.40
Community Level Outreach 11/12	1,323	1,323	£316,760.14	£316,760.14
Make the Call	13,970	13,970	£3,279,210.98	£3,279,210.98
Outreach Service ⁸	6,456		£2,321,771.45	
Indirect Targeting Total	299,958	263,133	£13,935,693.20	£11,375,346.26
Overall Total	441,084	375,309	£50,741,318	£40,733,773



APPENDIX 2

IMPROVED INCOMES & OUTCOMES: RECENT REAL CASE STUDIES FROM BENEFIT UPTAKE PROGRAMMES

Lily, 58 from Larne is widowed, owns her own home and is living with a disability. She made the call to the freephone helpline.

Lily's husband was the breadwinner and had put some savings away before he passed away. Lily was awarded Bereavement Benefit for one year after his death. Once that stopped Lily had been living off those savings and was finding it hard to make ends meet. She made the call and had her benefit check. One of our Community Outreach Officers assessed her circumstances and found she was potentially entitled to Disability Living Allowance to help with her mobility and care needs.

Now...

Our Community Outreach Officers helped with the application forms and now **Lily is better off by £105.90 each week.**

.....

Betty and Harry are in their 80s, they both have some health problems and care for one another. They made the call to the freephone helpline

Betty and Harry were struggling to pay their household bills. Harry was already in receipt of State Pension Credit, whilst Betty was getting Attendance Allowance to help with her own care needs. She also claimed Carer's Allowance for looking after her ill husband. They didn't think they would be entitled to more. However, a Community Outreach Officer gave them each a personal benefit assessment and found they could potentially be entitled to more.

Now...

Harry's Pension Credit has increased by £83.93 per week; he receives £77.45 a week in Attendance Allowance and also gets Carer's Allowance of £32.60 for looking after Betty. There is now an **extra £193.98 every week going into their household** meaning things are not as tight and they can get the things they need.

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Carole is 46 from Coleraine and cares for her mother-in-law, Fran. She made the call to the freephone helpline.

Carole is the main carer for her elderly mother in law who has arthritis. Fran claims £77.45 in Attendance Allowance. Until Carole called the freephone helpline she didn't realise that she could be entitled to some benefits herself.

Now...

Carole claims £58.45 each week in Carer's Allowance. In addition she received an arrears payment of over £700. This was paid in respect of the previous three months where she was entitled to the benefit but didn't know about it.

Jimmy, 71 from Craigavon was getting paid benefits but a change in his circumstances meant he got some more.

Jimmy lives alone and was getting help with his housing costs. His state pension and low rate Disability Living Allowance were also in payment. His health had deteriorated and required some more assistance with his personal care needs. When he contacted the freephone helpline he was offered some help with an application to review his benefit claims.

Now...

A higher rate of Disability Living Allowance is in payment. **With the additional £56.90 per week** Jimmy is able to afford the extra help he requires with his care needs.

.....

Johnny, from Newtownabbey, was referred to Advice NI under the benefit uptake direct targeting programme.

Johnny is 84, married with an income of £284 per week made up of state and private pensions. He owns his home, which he shares with his wife. He was visited at home in December 2011 and Pension Credit and Attendance Allowance were discussed. He did not meet the qualifying conditions for Pension Credit but it was clear that he had care needs and his wife was providing the care. An Attendance Allowance claim form was completed.

Now...

Johnny was awarded Low Rate Attendance Allowance. He said that this extra money would make a big difference to him and his wife as he will use the money to see a physiotherapist, chiropractor and to get his toe nails cut.

Additional Income generated per week: £49.30

.....

Mr and Mrs Stuart were referred to Advice NI under the benefit uptake direct targeting programme.

Mr and Mrs Stuart are an elderly couple both aged over 80 living in Carrickfergus in a Northern Ireland Housing Executive property. They were in receipt of State Pension and a small amount of State Pension Credit. Mrs Kelly was in receipt of Disability Living Allowance. Mr Stuart suffered with serious medical conditions after having a heart attack and a stroke. These impacted on his daily personal care needs. Advice NI assisted with Attendance Allowance, Community Care Grant, Carer's Allowance and Pension Credit applications for the couple

Now...

Mr Stuart is in receipt of £73.60 per week in Attendance Allowance. Additional State Pension Credit payments are paid to the couple as they are both now entitled to Severe Disability and Carer's Premiums of £172.60 per week.

Additional Income generated per week: £246.20





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June 2013



An Agency within the Department for

**Social
Development**

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