



# **Supporting People – Maximising Income through the Uptake of Benefits**

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01 April 2016 – 31 March 2019



Department for

**Communities**

[www.communities-ni.gov.uk](http://www.communities-ni.gov.uk)



# Contents

Background .....	3
1.1 Strategic Context .....	3
1.2 Scope .....	4
1.3 Vision, Aims, and High Level Targets .....	5
1.4 Underpinning Principles .....	6
1.5 Annual Action Plans .....	6
Strategic Priorities .....	7
2.1 Strategic Priority Operating Model .....	7
2.2 Strategic Priority: 'Better Informed' .....	8
2.3 Strategic Priority: 'Better Partnering' .....	10
2.4 Strategic Priority: 'Better Uptake' .....	11
2.5 Reporting .....	12



# Background

## 1.1 Strategic Context

Improving Benefit Uptake will continue to be a priority for the Department for Communities (DfC) as part of the work of the new Social Inclusion Group within the Department. Social inclusion is often defined in terms of tackling poverty and social exclusion and within the new structure there will be the potential to broaden this vision and actions in terms of the positive role and contribution that we can make across society in developing a new Social Strategy.

For those unable to work due to disability, ill health or age, benefits are a significant part of their income and maximising benefit uptake can therefore contribute to tackling poverty. The Northern Ireland Poverty Bulletin 2013/14 stated that 16% of pensioners lived in relative poverty after housing costs, which represents approximately 47,000 pensioners.

Historically, barriers to claiming benefit have existed such as:

- Improving the evidence base
- Better targeting
- Improving access and delivery
- Responding at key life changes
- Strengthening partnerships
- Encouraging innovation

Improving Benefit Uptake (IBU) has done much to overcome the barriers to claiming benefits. A Household Income Database (HIDB) has been developed to link all sources of income, be that from social security benefits, tax credits, savings or earnings from employment. This enables an assessment to be made as to whether a household or individual may have entitlement to a means tested social security benefit. The database will be fully tested during the period of this plan. IBU have also engaged with customers with potential entitlement either directly through targeted exercises, or indirectly through enquiries and referrals generated by advertising, promotion, and collaborative partnership arrangements across other Government Departments, the wider Public Sector and the Voluntary and Community sectors.

Since 2012, headline outcomes show that these activities generated £30.1million in additional annual benefit for almost 9,000 people across Northern Ireland, many of whom were vulnerable through age, ill health or financial circumstances.

In 2014/15, those who benefited were, on average, better off by an extra £65 per week. However, we realise that more needs to be done and 'Supporting People – Maximising Income through the Uptake of Benefits' sets out the DfC benefit uptake Strategic Priorities for the next three years, commencing on 01 April 2016.



## 1.2 Scope

‘Supporting People – Maximising Income through the Uptake of Benefits’ will focus on further developing benefit uptake achievements delivered under ‘Maximising Incomes & Outcomes – a 3 Year Plan for Improving the Uptake of Benefits’, set against a background of significant change which will occur throughout the lifetime of the new plan.

**IN SETTING OUT THE STRATEGIC PRIORITIES FOR THIS NEXT PHASE, THE DEPARTMENT HAS TAKEN INTO ACCOUNT:**

- Current and future capability and resourcing within IBU to deliver an effective and developing Benefit Uptake Programme;
- How IBU will deliver the programme within the new structures, aims and goals of DfC and wider Programme for Government (PfG);
- How IBU will deliver the programme within a new benefit environment driven by Welfare changes; and
- How IBU will deliver the programme against technological changes, and, in particular, increasing customer engagement through digital channels.



## 1.3 Vision, Aims, and High Level Targets

THE VISION FOR 'SUPPORTING PEOPLE – MAXIMISING INCOME THROUGH THE UPTAKE OF BENEFITS' IS:

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“To ensure that every individual and household across Northern Ireland is receiving all the social security benefits to which they and their families are entitled.”

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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.

### HIGH LEVEL TARGETS

By 2019 we will:

- Target a minimum of 100,000 people with the offer of a full Benefit Entitlement Check; and
- Secure at least £40 million in additional benefits.

## 1.4 Underpinning Principles

Three underpinning principles have been identified to provide a strategic direction for subsequent operational activity.

### THEY ARE AS FOLLOWS:

- To improve the lives of individuals and their families, many of whom are vulnerable, by directly increasing their income thereby enhancing their financial capability;
- To contribute to the improvement of the Northern Ireland economy by releasing previously unclaimed but entitled benefits that will enable additional spending on local goods and services; and
- In tandem with generating direct economic benefits, to help improve the overall 'wellbeing' of our customers and wider society through beneficial social returns on our investment.

## 1.5 Annual Action Plans

An Action Plan setting out low level operational activity to underpin the Strategic Priorities will be published for each year of 'Supporting People – Maximising Income through the Uptake of Benefits'.

For the first year (2016/17), IBU have considered both the internal and external operating environment within Northern Ireland.

A number of unprecedented changes will come into play during this period which will affect organisational structures and, potentially, methods of operation. These factors include the establishment of DfC, the restructuring of other government departments, the potential for a new PfG, and the introduction of Welfare Changes.

Taking the above into account, the Action Plan for 2016/17 will include a transitional phase that will cover the first eight month period. This will allow IBU necessary 'breathing space' to review and adapt to any structural and operational changes that may affect the team and its business functions, whilst still maintaining current high levels of service to customers.

It will also provide the opportunity to learn from the significant 'change' agenda and use this knowledge, evidence and experience to better inform plans which will cover the subsequent years.



# Strategic Priorities

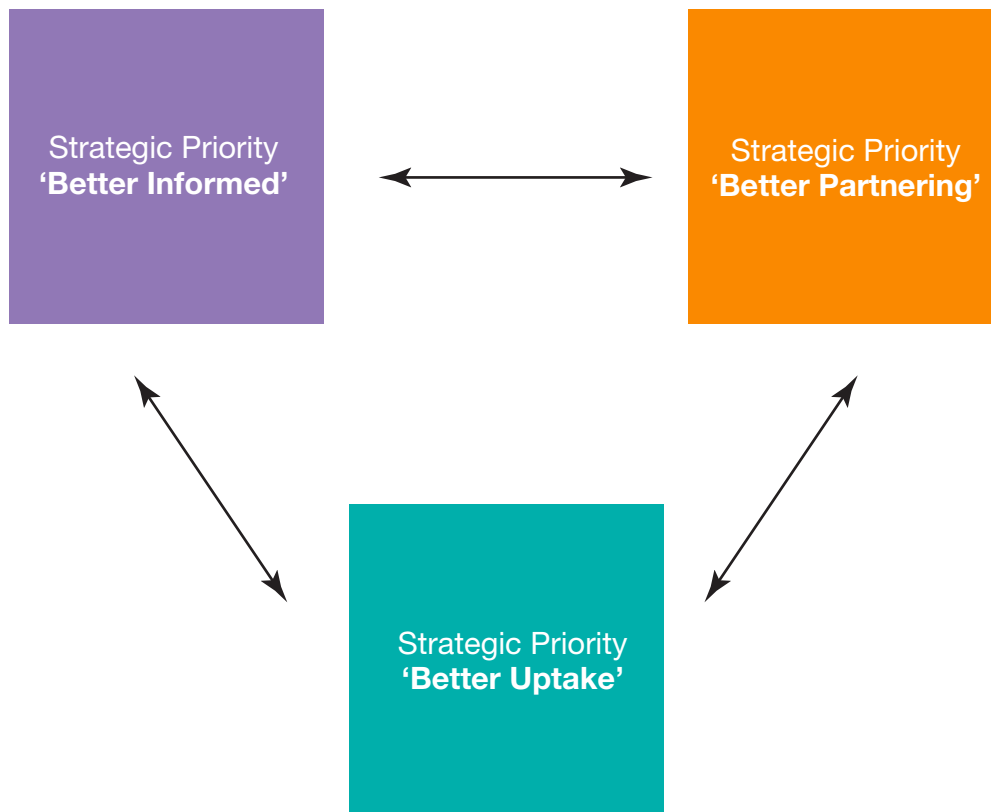
## 2.1 Strategic Priority Operating Model

The Department for Communities will prioritise investment in the following three strategic priority areas for action to improve the uptake of benefits over the three year term of this plan.

These are entitled: ‘**Better Informed**’, ‘**Better Partnering**’ and ‘**Better Uptake**’

Our ultimate aim is to achieve Better Uptake, however, all three priorities are designed to support and drive each other.

- **Better Informed:** Using available information and data to ensure all benefit uptake activities have a sound basis;
- **Better Partnering:** Maintaining and strengthening partnerships across Government Departments, the wider Public Sector and the Voluntary and Charity sectors which provide key levers in reaching people with benefit entitlement needs; and
- **Better Uptake:** The outcome of all three strategic priorities, but also relating to the development of IBU’s core business areas and associated promotional activities.



## 2.2 Strategic Priority: 'Better Informed'

'Better Informed' has been identified with the specific purpose of pro-actively using information such as published reports, surveys and other findings, and available data to identify new benefit uptake opportunities and ensure that all activities deployed have a sound basis.

Northern Ireland Government Departments hold a wealth of data that would assist Improving Benefit Uptake in effectively targeting customers, however, due to data sharing protocols this data is currently not allowed to be shared. The Government has recently launched a consultation into the sharing and use of data in public sector organisations. The proposals include reforms to the way Government uses individual citizens' data to improve the public services they rely on, as well as measures to ensure that the rich datasets available to Government can be properly used to produce world-leading research and statistics.

IBU will continue to investigate data sharing opportunities, particularly in Years 2 and 3 of this plan when it is anticipated that new capabilities will be available if primary legislation is agreed in line with specific social policy objectives.

IBU will continue to utilise Analytical Services Unit (ASU) to provide datasets that enable IBU's Direct Targeting exercises. This collaborative working includes the regular analysis and review of demographic data collated by ASU and its effective filtering based on customer age, gender and benefit history to best meet IBU targeting purposes.

It is inherently difficult to estimate benefit uptake rates, however in the past number

of years progress has been made in the development of a Household Income Database (HIDB) which links all sources of income, be that from Social Security benefits, tax credits, savings, or earnings from employment. IBU has commenced testing this database, and in 2015/16 targeted 2,500 customers for potential entitlement to Attendance Allowance and State Pension Credit. 515 customers responded to the initial letter, and a further 1,635 were contacted by telephone. From these contacts, 868 received a Benefit Entitlement Check and 569 were identified as having potential entitlement to a Social Security or Passported benefit.

During the period of this plan IBU intend to further explore the capabilities of the HIDB and expand its utilisation to effectively target customers.

IBU will work collaboratively within DfC and across wider Government in Northern Ireland to co-ordinate benefit uptake activities and plans in line with PfG social policy development, with particular emphasis on addressing the needs of vulnerable people in the areas of health, poverty and social inclusion.

It is also important that IBU continually measures and assesses its own performance in terms of customer service delivery. As such, IBU will develop a customer service evaluation strategy over the period of this Plan which will



include both customer engagement and the measurement of internal Key Performance Indicator (KPI) response criteria.

Pro-active investment in the 'Better Informed' Priority will have a direct and measureable effect, not just in delivering improved customer outcomes, but also in influencing the optimum use of resources within IBU the Department and wider Government.

#### **PRIORITIES:**

- Work collaboratively across both DfC and wider Government to maximise the effectiveness of benefit uptake activity in line with agreed social welfare policy and PfG;
- Explore ways to evaluate benefit uptake customer service delivery, (for example through the use of customer surveys) and internal evaluation of quality based KPI's

such as telephony response performance, Outreach referrals and claims conversion rates. IBU will develop an evaluation strategy over the period of this Plan to support the above objective;

- Focus on the utilisation of research and learning available through both Government and external sources;
- Build upon lessons learned using evidential experiences to date;
- Exploit every opportunity to improve the knowledge base in order to best drive and shape future benefit activities; and
- Continue to develop management information systems to monitor, evaluate and inform the development of existing and future benefit uptake activity.

## 2.3 Strategic Priority: ‘Better Partnering’

Life is complex, and targeting customers at life changing events such as the onset of illness/disability, death of a partner or relationship breakdown would ensure that eligible recipients are identified for benefit entitlement at the time it is most needed. However, we cannot do this alone. Co-operation and collaborative effort is required with all those who are involved at different stages along the customer journey and who have an interest in their social welfare.

Building strong partnerships not just at community level through the Voluntary and Community and Charity sectors, but also across Government Departments and the wider Public Sector, are key levers in reaching people with potential benefit entitlement. As such, it is essential that IBU are able to participate in, and exploit, any relevant operational opportunities that exist, or may develop, both within its own Department, and across other Government Departments as appropriate.

As set out under ‘Better Informed’, information sharing is key to achieving the Government’s goal of delivering better, more efficient public services that are coordinated around the needs of the individual. It is vital to enable early intervention and preventative work, for safeguarding and promoting welfare and for wider public protection, and is a vital element in improving outcomes for all.

Through close collaboration, IBU can assist more people and ensure that those who are experiencing change in their lives are getting all the benefits, services and supports to which they and their families are entitled to.

IBU will therefore build on partnership successes to date and utilise best practice from previous experience to help bring about successful customer outcomes throughout the lifespan of the 2016 – 19 plan.

### PRIORITIES:

- Maximise opportunities to strengthen and develop partnerships and relationships within and across Government Departments, particularly in related areas such as health, poverty and social inclusion;
- Continue to develop work areas, where strong and effective community contacts and established communication channels are already in place, which allow us to ‘tap into’ platforms that help facilitate the promotion of benefit uptake work;
- Focus on strengthening and developing partnerships and engagement with external organisations such as councils, the Voluntary Sector, and relevant charities;
- Collaborate with relevant organisations to ensure that when people, for example, are entering or leaving hospital or living with chronic or life limiting conditions, they will get the help they need when they need it most; and
- Maintain and strengthen existing relationships with all current community based partners.

## 2.4 Strategic Priority: ‘Better Uptake’

‘Better Uptake’ will be the outcome of all three strategic priorities but also relates to the development of IBU’s core business areas and associated promotional activities.

### INDIRECT TARGETING:

Indirect Targeting, led by the high profile ‘Make the Call’ advertising campaign has made the largest single contribution to benefit uptake revenue generation during the lifetime of ‘Maximising Incomes & Outcomes – a 3 Year Plan for Improving the Uptake of Benefits’. In 2014/15, just under £6 million (almost 40% of the total £15.9 million) was generated by this strand.

A key focus is therefore to further develop the ‘Make the Call’ brand throughout the 2016 – 19 plan in order to maximise potential revenue generation. This will include progression in the following key areas:

### VISUAL DEPICTION:

The branding phrase ‘Make the Call’ has strengthened over time in terms of familiarity and recall with target audiences. This can be evidenced in terms of year on year increases in response, and subsequent claims conversion rates and revenue generation. However, to date there has been no real continuity in the way the phrase ‘Make the Call’ has been visually presented.

### PRIORITIES:

- To further strengthen the brand by creating a single ‘Make the Call’ logo which will consistently present the phrase, providing continuity across all chosen media platforms and associated marketing collateral including promotional items.

### TARGET AUDIENCES:

Historically ‘Make the Call’ advertising has been targeted in the main at IBU’s primary audience,

i.e. older people and their carers. However, the plan’s vision – “To ensure that every individual and household across Northern Ireland is receiving all the Social Security benefits to which they and their families are entitled” determines a broader remit:

### PRIORITIES:

- Working in close partnership with Government Advertising Unit, Departmental Communications officials and a newly appointed advertising agency, IBU will examine ways to expand both strategic and tactical advertising in order to reach other customer groups experiencing key life changes without losing emphasis or focus on the primary audience;
- IBU will work to develop a new advertising strategy for the duration of the plan, which will set out both creative direction and operational scheduling;
- IBU will work to optimise ways to reach new audiences through alternative creative treatments and the use of additional media platforms such as radio and social media; and
- In tandem with the advertising strategy, IBU will develop a public relations plan for each of the three years to further increase and reinforce awareness of the ‘Make the Call’ brand. This will include working closely with Departmental Press Office to identify and deliver co-ordinated media opportunities, and the use of promotional and marketing materials to enhance campaign objectives.



Operational details of the development of the advertising strategy and the 'Make the Call' campaign as a whole will be set out in each annual low level activity Action Plan.

#### **DIRECT TARGETING**

Historically, Benefit Uptake Direct Targeting exercises have operated in single period tranches throughout a given reporting year with the support of an outsourced supplier to handle customer responses and carry out BEC's. In autumn 2015, IBU implemented a revised Direct Targeting 'hybrid' model, with a proportion of responses being handled by a newly created in-house team located at Knockbreda Jobs & Benefits office. This campaign ran until the end of March 2016 and a full evaluation of outcomes is underway.

#### **PRIORITIES:**

IBU will work to ensure that the Direct Targeting approach deployed will maximise all opportunities to increase benefit uptake within targeted customer groups.

#### **THIS WORK WILL INCLUDE:**

- On-going evaluation and refinement of data selected for targeting purposes. Elements for consideration will include using information from the Northern Ireland Statistics and Research Agency's Family Resources Survey and working further with ASU to identify areas of deprivation, and female customers over the age of 75 and living alone. IBU will also explore ways to target customers with potential entitlement to Carers Credit;

- Review and refinement of Ministerial correspondence used to encourage customers with potential entitlement to 'Make the Call';
- Review of the frequency and timing of Direct Targeting exercises with consideration being given to the potential to increase benefit uptake revenue generation opportunities through more prolonged activity; and
- Review and, if required, further refinement of the Direct Targeting operating model to maximise delivery effectiveness.

#### **COMMUNITY OUTREACH**

Community Outreach Officers play a key role in generating benefit uptake by assisting vulnerable customers with face to face claim completion and other benefit support in the home, and by promoting the work of IBU at information and awareness events and benefit clinics.

It is vital, particularly in light of the Welfare Change roll out, that the Community Outreach Service is designed to provide maximum assistance to customers in terms of benefit uptake.

#### **PRIORITIES:**

IBU will work to ensure that the Outreach approach utilised will maximise the quality of customer service delivered through the Community Outreach Service against a backdrop of changing business needs and budget constraints.

## 2.5 Reporting

Activity and outcome updates against the Strategic Priorities as set out in each Action Plan will be published annually as key phases of work are completed.





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