



Llywodraeth Cymru
Welsh Government

PUBLICATION, DOCUMENT

Streamlining Welsh Benefits Steering Group meeting: 25 June 2024

Streamlining Welsh Benefits Steering Group meeting held on 25 June 2024.

First published: 25 June 2024

Last updated: 25 June 2024

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

Contents

Attendees

Chair's welcome

Presentation from Policy in Practice (PiP): working to maximise incomes with Welsh local authorities

Workstreams update / kick-off session feedback

Local Government SRO advisory group

Risk log

One pager: streamlining Welsh benefits

Implementation plan: when and what

Minutes of last meeting and any other business

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

Attendees

Fran Targett, Chair
Anna Friend, Flintshire County Council
Beatrice Orchard, The Trussell Trust
Joanna Goodwin, Centre for Digital Public Services
Karen McFarlane, Children in Wales
Lindsey Phillips, Welsh Local Government Association
Lisa Hayward, Welsh Local Government Association
Matthew Evans, Welsh Revenues and Benefits Managers Group
Miranda Evans, Disability Wales
Nigel Griffiths, Bridgend CBC
Simon Hatch, Citizens Advice Cymru
Steffan Evans, The Bevan Foundation

Facilitators

Adrian Devereux, Workstream Facilitator
David Willis, Welsh Government
Glyn Jones, Workstream Facilitator
Josh Parry, Workstream Facilitator
Mel James, Welsh Government
Paul Neave, Welsh Government
Sam Pidduck, Welsh Government

Apologies: Helal Uddin (Ethnic Minorities and Youth Support Team), Leah Whitty (Workstream Facilitator), Ben Gibbs (Workstream Facilitator), Claire Germain (Welsh Government), Victoria Lloyd (Age Cymru), Amanda Main (Caerphilly CBC), Emma Morales (Centre for Digital Public Services), Katie Till (The Trussell Trust)

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

Chair's welcome

The Chair updated the group on her recent meetings with Lesley Griffiths, Cabinet Secretary for Culture and Social Justice as well as with Councillor Hunt, WLGA Lead Finance Spokesperson. Both meetings were positive and had reaffirmed the commitment to support this project.

The Chair gave an update regarding the planned progress update that she and Councillor Hunt were due to provide to the Partnership Council for Wales meeting on July 8th. This meeting has now been postponed and we are awaiting the date for the next meeting which will likely be in the Autumn.

Finally, members were reminded that the minutes of all steering group meetings will be shared on the newly published [Welsh Government website](#).

Presentation from Policy in Practice (PiP): working to maximise incomes with Welsh local authorities

The Chair welcomed representatives from Policy in Practice who provided a presentation on how they work with Welsh local authorities to maximise incomes.

Offering a brief introduction to PiP as an organisation, RW explained how they use the insights from research and data in relation to poverty and social outcomes to help improve the delivery of policy through tools such as the Better Off Benefits Calculator and Low-Income Family Tracker (LIFT). In Wales specifically, PiP are working with over 30 organisations, including some Local Authorities who are seeing positive results.

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

Using their policy and practical knowledge / expertise PiP presented 6 potential recommendations that could be considered in the streamlining of Welsh Benefits

1. central application portal
2. automate eligibility and application: use existing data to automate processes and reduce manual input
3. establish uniform data sharing: implement a standardised framework for data sharing among benefit agencies
4. ensure data integration and privacy: safeguard data while integrating sources to improve service delivery
5. conduct a technical feasibility study: evaluate the technical needs and challenges of a centralised Welsh Benefits system
6. engage Stakeholders: collaborate with all relevant parties to align on system design and implementation

RW explained how PiP use 2 different approaches, project and regional. A project approach is where a group of organisations come together and decide to work on a joint campaign. For example, the Greater London authority took this approach and across 17 boroughs ran a targeted Pension Credit Campaign. Which resulted in an increase of claims with a life-time value of 100 million pounds of previously unclaimed Pension Credit. This works out to roughly £98 in unclaimed Pension Credit returned for every £1 spent.

Alternatively, there is the regional approach where access to the LIFT tracker is purchased for a geographic region who then uses this data (taken from HMRC, DWP and Local Authority sources) to identify, track, and target households who are not claiming what they may be entitled to. This could return £32 each year for every £1 invested.

Following the presentation, it was noted that estimations of unclaimed benefits tend to not include health-related benefits such as Personal Independence Payment. RW explained how PiP estimate means-tested benefits as it is more reliable and easier to do as there is an element of subjectivity in many health-

related benefits. However, PiP are interested in looking at working age health benefits this year.

Introducing himself as the Design/Data Workstream facilitator, GJ requested a meeting between himself and PiP to discuss the flow of data and the LIFT dashboard. As the facilitator for the Communications Workstream and the lead for the Welsh Government Cost of Living / Here to Help promotional Campaign, it was agreed AD would join to learn more about alternative uses of data to target take-up campaigns.

Agreeing to meet, RW also shared that PiP sit on the DWP data sharing steering group who are supportive of their work. Continuing to note that targeted campaigns using PiP-sourced data can result in 3-4x higher success rates than traditional, broad-stroke maildrop campaigns.

The group noted the importance of ensuring that the speculative research of organisations such as PiP and The Bevan Foundation does not get confused with the here and the now work on Welsh Benefits. In agreement, FT noted that having SE from The Bevan Foundation will help in ensuring the steering group is kept updated on the organisation's publications.

Action point 1: GJ, AD and PiP to meet to discuss data sharing and the further use of data in targeted campaigns.

Action point 2: SE to keep the steering group informed of any new Bevan Foundation research or publications in this area.

Workstreams update / kick-off session feedback

Members were updated on the joint kick off session facilitated by CDPS which took place on 20 June for the Phase 1, eligibility and design/data workstreams.

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

The session involved a wide-ranging discussion on hopes/fears, aspirations, as well as approval of the assigned priority actions.

The dangers of proceeding too quickly with a theorised solution for Phase 1 (such as, a single application form) without a full understanding of the as-is situation within local authorities was discussed. Resulting in the reaffirmation that any work from the project should build upon existing progress within Councils and not represent a backwards step.

FT and PN noted that these sentiments were echoed in the session, and it is key priority of Phase 1 / Design and Data to further understand the systems and processes in place within each local authority.

Referring to a discussion in the kick-off session around local authority capacity pinch-points in the coming year, AF shared how this will vary widely from service to service. So, whilst key pinch points should be acknowledged, it should also be noted that there will likely never be an ideal time for all local authorities.

In reference to the draft Workstream Commissioning document and kick-off session summary report shared with the group, the Core Team requested approval of the documents and agreement for Workstreams to commence work based on their contents. The group agreed.

Local Government SRO advisory group

LP started this item with a brief presentation updating the steering group on the progress made in relation to the Local Government SRO advisory group. All 22 Councils have now nominated a Senior Responsible Officer to champion the streamlining work and to join the advisory group. The first meeting was held in May and had good attendance.

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024.html> for the latest version.

Get [information on copyright](#).

Terms of Reference for the SRO Group were discussed at this meeting and will be signed off at the next meeting which is planned for July.

As the project progresses the Advisory Group will provide expertise and guidance to the steering group, with each member driving the work forward within their local authority. The advisory group will feedback regularly to the steering group and workstreams.

At their first meeting, SRO's raised the following issues which the steering group will need to consider: funding, understanding As-is, Not assuming the solution from the start, specifically in relation to a single form or platform.

Following the update, a discussion was held on what mechanism would be used for Workstreams to make requests for information to the SRO group. This is still a matter up for discussion, however, there was agreement that requests for information should be fed through to the Core Team who will take it forward for the time being.

On the matter of whether the SRO Group were content with the current Workstream membership, noting that it had previously been discussed that each local authority should be represented on at least 1 workstream, LP advised that the SRO Group will continue to work on this.

Action Point 3: LP (and Core Team) to continue to increase local authority representation on the workstreams.

Risk log

Introducing this item, DW informed the group that the core team has been working on a draft risk log for the project. A very early draft was shared with the group and members were asked to send risks (and their mitigations) they think

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

should be included to the core team.

SE asked that pace of activity be assigned a higher risk status on the risk register. This request was approved by members.

Action point 4: risk classification of pace of activity to be increased and members to send additional risks and potential mitigations to MJ / SP.

One pager: streamlining Welsh benefits

Following the last steering group meeting, a draft informational document on the project to streamline Welsh Benefits was prepared and presented to members at this meeting. The purpose of the document is to give an overview of the project and is to be shared with stakeholders to make them aware of the work that is taking place.

The document was approved as it stands with a minor amendment to the naming of organisations. There was also agreement that if we were to produce something for a wider public audience it would need to be adapted to suit.

GJ shared that he is aware of other organisations, such as a Public Service Board (PSBs), that are also working to maximise incomes. Acknowledging the importance of stakeholder engagement and to ensure no duplication of effort, the group agreed to share the stakeholder document with PSBs.

On a similar note, SH shared that there has been a lot of public sector work on Income Maximisation such as that being done by Public Health Wales, and we could also engage with them. FT noted that as Chair she would be happy to discuss her role in this too.

Action point 5: core team to share stakeholder document with Public Service Boards.

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).

Action point 6: core team to explore the best way of engaging with / sharing project updates with wider stakeholders.

Implementation plan: when and what

Introducing this item, PN requested volunteers to help to shape initial thoughts which could be used as a basis of an implementation plan. This would be used to facilitate an open discussion for all steering group members at the July meeting.

In response to this request, AF / SE / LH / JG / AD put their names forward.

Action point 7: core team and nominated members to meet to discuss the basis of an implementation plan.

Minutes of last meeting and any other business

The minutes of the last meeting were amended to reflect the correct name of Flintshire Council and then approved. (30.04.24)

No aob was raised, and the next hybrid meeting was confirmed for the 24 July 14.00 – 16.00 in Cardiff.

Due to annual leave during summer months, it was agreed that the following meeting would be held in September, exact date to be confirmed.

Action point 8: core team / FT to identify suitable date for September meeting and issue invitations.

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024.html> for the latest version.

Get [information on copyright](#).

This document may not be fully accessible.

For more information refer to our [accessibility statement](#).

This document was downloaded from GOV.WALES and may not be the latest version.

Go to <https://www.gov.wales/streamlining-welsh-benefits-steering-group-meeting-25-june-2024-html> for the latest version.

Get [information on copyright](#).