

**HOUSING & COUNCIL TAX BENEFIT - PENSION PARTNERSHIP BID TO DEPARTMENT OF
WORK AND PENSIONS**

(Report by the Head of Revenue Services)

1. INTRODUCTION

- 1.1 The Department for Work and Pensions (DWP) intends to increase take up of state benefits for pensioners. The DWP has invited councils to bid for funds to enable increased pensioner benefit take up through partnership working. Huntingdonshire DC has agreed to be the lead authority on behalf of all the Cambridgeshire local authorities in submitting a bid for funds to recruit a Welfare Benefits Adviser at each authority to specifically target pensioners who are not receiving Pension Credit, Housing or Council Tax benefit. The cost of the scheme will be fully funded by the DWP for two years.

2 PURPOSE

- 2.1 To obtain Cabinet approval for the bid and subsequent implementation of the project, subject to approval within the MTP.

3 BACKGROUND

- 3.1 In March, the DWP wrote to all LA's to invite bids for funds to improve benefit take up for pensioners. The bid had to include partnership working and be supported by the LA and the LSP.
- 3.2 The Cambridgeshire Benefit Managers Group had already been meeting (following the Benefit Fraud Inspectorate's recommendations as part of the Comprehensive Performance Assessment) to increase benefit take up. Following the receipt of the DWP letter, the Group met to discuss the possibility of creating a county-wide welfare benefits advice group that would be fully funded by the DWP grant.
- 3.3 Following various joint meetings which included Ely CAB on behalf of East Cambs Council, the Group agreed to a joint bid, co-ordinated and led by Huntingdonshire District Council, on the basis that the scheme would support several strategic aims for each authority. As the closing date for receipt of bids by the DWP was 30 June, the Head of Revenue Services submitted the joint bid within the required timescale and endorsement of that action is sought.

Details of the requirements of the scheme are shown at Annex A.

Details of the aims and operation of the scheme are shown at Annex B

- 3.4 The proposed scheme supports the following strategic aims:
- Council services that meet local needs
 - Safe & active communities
 - Housing that meets local needs
 - Accessible services
 - Service improvements

- Effective partnerships
- Innovation & improvement

4 STAFFING ISSUES

- 4.1 HDC will employ a Welfare benefits advisor (salary circa £20,000 pa) to visit pensioners in their home to assist them to claim Housing benefits, Council Tax benefits, Pension Credit, Attendance Allowance and other benefits. As lead authority in the partnership bid, HDC will also employ an administration officer (salary circa £15,000 pa) to collate information from partner authorities and report back to the DWP. The other partner authorities (Cambridge City, South Cambs, Fenland and Ely CAB) will employ their own welfare advisors. Cambridgeshire County Council has agreed to train the welfare advisors in a range of welfare benefits (at no cost to the Council).
- 4.2 The scheme will run for a maximum of two years (2004/05 and 2005/06) subject to it being funded by the DWP. The DWP have been advised that if only part funding is received, the scheme will run for a shorter period. There should be no cost to the Council for this project other than management time in recruitment, selection and coordination of the staff.
- 4.3 The DWP have advised that they will respond to bids within 60 days. If the bid is not successful, the project will not go ahead.

5 FINANCIAL IMPLICATIONS

- 5.1 The cost of setting up the scheme and paying the staff will be fully funded by the DWP. Following changes to the Housing Benefit subsidy regime, all benefit paid will be fully subsidized, so there will not be any direct budgetary impact.
- 5.2 If after two years there is no further funding and the project is successful, Members should note that the scheme will be reviewed and may submit a bid under the MTP. The continuation of the scheme will then be at Members' discretion in the light of competing priorities.

6 RECOMMENDATION

- 6.1 It is therefore

RECOMMENDED

- that the action taken in submitting the bid to the DWP be endorsed;
- that, in the event of the application being successful, the Cabinet agree to the release of the grant to enable the scheme to be implemented.

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Background documents;

The Pension Service Partnership Fund Application Pack.

Annex A

THE PENSION SERVICE PARTNERSHIP FUND

QUALIFYING CRITERIA

- 1 The proposal **must** support:
 - Improved take-up of older people's benefits, particularly by "hard to reach" groups.
- 2 One or more of the following aims should also be considered for inclusion (these are not mandatory):
 - Promotion of independence in older people:
 - Integrated joint working between partners:
 - Improved access to services:
 - Better understanding of older people's needs in a specific community, region or country setting including the needs of ethnic minority elders.
- 3 The **objectives** of the proposal must be **clear and realistic**. Applicants will need to demonstrate what is to be achieved, and by what method, with a timetable showing key milestones along the way.
- 4 The outcomes from the proposal should preferably add **long term benefit**. However, initiatives resulting in high impact but short-term benefits will not necessarily be excluded.
- 5 The proposal must be **co-sponsored by at least one other partner organisation** to demonstrate its feasibility and credibility. Co-sponsorship by a Local Strategic Partnership, Community Legal Services Partnership, Rural Community Council or Scottish Community Planning Partnership will also fulfil this requirement. Demonstration that bidders have consulted with The Pension Service local service will also be helpful.
NOTE – Although co-sponsorship is a requirement, the award of funds will be solely to the bidder.
- 6 The proposal must identify how **resources allocated will be used**. The proposal must demonstrate, as far as possible, that resources allocated to the proposal will **be in addition to any other funds** for activity undertaken within the community. The initiative can be a new one or an existing one where current funds prohibit an expansion in customers contacted or an extension in time-scale. Where necessary, confirmation from other funding providers will be required.
- 7 The proposal must demonstrate engagement and consultation with other interested groups in the community working in similar areas (in addition to the co-sponsor). Consultation with **customers** as well as the Local Strategic Partnership, Community Legal Services Partnership, Rural Community Council or Scottish Community Planning Partnership should be considered.
- 8 Proposals must demonstrate **compliance** with the principles underpinning Third Age development, particularly in relation to **data capture and data sharing**; all parties must have an identified Data Protection policy, compliant with data protection legislation.

- 9 All proposals must demonstrate how the initiative will be **evaluated** and **how lessons learned** will be disseminated.
- 10 **Applications must be made on the form at Annex D** and be submitted with full details of the proposed initiative and related costs. The application should show both the set-up and running costs of the proposed initiative, broken down for each 12 month period; and if the organisation is liable for VAT, should show costs inclusive of VAT.
- 11 Contracts will be awarded on a yearly or two-yearly basis. There is a lower limit of £500. There is no upper limit.
- 12 The Pension Service will own any crown copyright and intellectual property and product rights arising from any proposal.
- 13 Proposals must include an assessment of how the initiative supports the principles of equality in respect of race, gender, disability, age, sexual orientation and religion/belief.

ANNEX B

Aims and Operation of the Scheme

This project will take a countywide approach to improve the benefits take up in Cambridgeshire. The project management involve a number of partners across the County to reflect the individual districts involved.

Who will deliver this project?

Huntingdonshire District Council: Lead Partner

As lead partner Huntingdonshire District Council will take responsibility for:

- Collating monitoring and evaluation information to return to the Pension Service
- Responsibility for budgeting and financial arrangements
- Drawing up partnership agreement

Project Partners

The project will be delivered through joint working arrangements between:

- Huntingdonshire District Council
- East Cambridgeshire District Council /
- Ely and District Citizens Advice Bureau
- Fenland District Council
- Cambridge City Council
- South Cambridgeshire District Council

Representatives from each organisation will form a '**Project management group**'

The responsibilities of the project management group will be:

- Co-ordinate the overall aims of the project
- Recruitment and selection of welfare benefit officers
- Provide training for welfare benefit officers in the district.
- Awareness raising with relevant agencies Cambridgeshire
- Line management by geographical area to welfare benefits officers
- Liaison with DWP.
- Maintain and collate monitoring information for the whole district
- Sub contracting arrangements

The project management group will report to the project board. The project board will consist of the local authority officers responsible for the revenues and benefits services in each local authority. The responsibilities of the project board will be:

- Assess the project is achieving it's objectives
- Oversee major plans
- Raise the profile of the project on a county wide strategic level.

Welfare Benefits Officers

There will be 5 welfare benefit officers appointed for the post plus two Admin Officers, which includes the CAB element of the bid. They will have local authority district boundary responsibilities. They will be responsible for implementing and carrying out the project to suit the needs of each district. Each officer will report to the project management group.

Ely and District Citizens Advice Bureau has been appointed a partner alongside East Cambridgeshire District Council. This takes into account the contracting out of benefits services within the Local Authority and the developing partnership arrangements in the district.

Partnership Agreements

It is the duty of all Districts to contribute to the increase of benefit take-ups. This project will act as a catalyst for partnership arrangements, if successful the partners will be asked to sign up to an agreement that sets out:

- How funds will be used
- The responsibilities of each partner, the management group and board.
- How issues will be resolved
- How the project will be 'badged'
- Reporting and monitoring requirements
- Commitment to meetings and project work.

Past Experiences to deliver this project:

Huntingdonshire District Council as lead partner

- Experience in dealing with a range of people including older people
- Processing benefit claims
- Mail shots to large numbers of people
- Face to face contact
- Partnership working
- Managing and monitoring externally funded projects

Each local authority has experience of working with a range of people within their dedicated benefits sections. They have significant experience of reaching the local community and providing advice and information. They have significant resources and knowledge of their local areas.

Huntingdonshire benefits service has had two positive BFI inspections – the latest in January 2004 as part of the council's CPA inspection. The council is set to receive 'Excellent' status under the Comprehensive Performance Assessment.

Ely Citizen Advice Bureau has extensive experience of providing a range of advice to local people and harder to reach groups. It holds the Legal Services Commission Quality Mark at general work and casework help level. In 2001-2002 the organisation helped over 3000 clients claim £0.5 million.

Impact of project:

This project will impact on a wide range of organisations within the Cambridgeshire County. The project management group has identified the need to build relationships with a number of organisations. These relationships will be for operational and strategic purposes.

All local strategic partners in each district have been approached and support the project as co-sponsors. The project management board will feed evaluation information to the LSPs for strategic purposes.

Promoting the independence of older people by enabling them to live in their own homes is a key priority of the County Councils, PCTs and Local Strategic partnerships. The number of older people helped to live at home per 1000 people aged 65+ is a target within Cambridgeshire's first LPSA.

However, Cambridgeshire's performance in this area remains low compared with other authorities and it is believed that further stretching targets could be achieved. Within the second LPSA, the topic area will focus on the performance assessment framework.

The project will also need to build on other relationships both strategically and operationally and these are set out in the project plan.