



The Pension Service
Part of the Department for Work and Pensions



LGC AWARDS 2004

Application from Somerset County Council and the
Pensions Service:

'The Joined Up Government Initiative of the Year'

Development of a Joint Financial Assessment and
Benefits Team for Somerset's Older Citizens

*A dynamic new partnership delivering joined up
financial services and benefits to older people*



Executive Summary

Somerset County Council and the Pensions Service have developed an exciting joint initiative, based on an in-depth understanding of each other's change agendas. The desire to promote the well being of older people, and to serve them well, is at the heart of this initiative.

Our joint Financial Assessment and Benefits team has already demonstrated enormous potential to increase the income of older people and their carers, but in a highly cost effective way. Having one home visit from a visiting officer, who gathers the financial information once, and then with the customer's consent passes it on to a range of other agencies, is a simple but highly innovative concept. When combined with the single gateway to services and customer service ethos developed by Care Direct, Somerset finds itself in a lead position nationally. The result is an embryonic Third Age Service, an example of joined up government at it's best.

A witty but typical comment from a satisfied older customer: *" I had expected a severe old bat but the officer was very pleasant, helpful, and cheerful. I would most certainly recommend her for the work she has undertaken."*

We look forward to future developments. Our participation in the ODPM funded National Benefits Project should enable Somerset to make a distinct national contribution to the E-enablement of the Third Age Service. We are sure that the joint FAB team can make a significant difference to the take up of Pensions Credit. The fact that 70% of the new Attendance Allowance claims generated by the FAB team were as a result of Fairer Charging assessments is hard evidence that there is a strong business case for Joint Teams. This plus the fact that of 642 Attendance Allowance claims only 2 were not awarded, is a testament to the commitment, training and professionalism of the joint team's staff.



The Joint Financial Assessment and Benefits (FAB) Team

A Major Focus On Customers

From the earliest planning of this joint service, the local Pensions Service and Somerset County Council wanted excellent customer care to be a fundamental part of the joint FAB team. Good operational links between the Pensions Service and Somerset County Council had already been established through quarterly meetings. The focus of these meetings was how to improve benefit take up amongst older people.

Our relationship was further enhanced when the Pensions Service agreed to second staff to Somerset's Care Direct pilot site (October 2001). This developed contact between Somerset's Corporate Director of Social Services and the Change Manager for the South West region of the Pensions Service. We began to develop a closer understanding of one another's change agendas. We rapidly recognized at Care Direct the benefits to older people of staff working across the traditional local government/central government 'divide'.

These benefits include:

- ♣ *A single gateway to access a wide range of information and services*
- ♣ *The relief of giving confidential information to one trained advisor, rather than having to repeat it to different agencies*
- ♣ *Knowing that for most requests the advisor had access to specialist knowledge close at hand*

The Fairer Charging initiative from the Department of Health provided further impetus, and this coincided with plans from Department of Work and Pensions to re-structure the Pensions Service. The majority of contacts by older people would be by telephone to Pensions Centres. There would be a need for local Pensions Service teams to offer a home visiting service to the most vulnerable groups of older people.

Somerset Social Services and the local Pensions Service would be dealing with the same large group of older people, many of whom would require Social Services assessment of need, followed by a Fairer Charging Assessment.



Fairer Charging assessments were to be automatically accompanied by a welfare benefits check. It was older people who, by reason of their frailty, disability, or sensory impairment, who would require home visits from the local Pensions Service. We realized it would be possible to deliver a more efficient and more economical service if delivery of financial advice and services to these citizens could be achieved through a joint service. Would this also have the potential for significantly improving customer care to older citizens and their carers, some of whom were socially excluded and living in poverty?

Planning meetings were set up in early 2002. Initially these were exploratory, but both organisations moved to embrace the opportunity. The joint FAB team was recruited and became operational in October 2002.

What Are The Main Elements Of The Joint FAB Team?

The joint FAB team is:

- ⊞ A new service, mainly for people over 60, their carers and relatives.
- ⊞ It has close links to Care Direct Somerset, whose advisors are in a prime position to refer older people, with their consent, to the joint FAB team for welfare benefit checks and pensions advice.
- ⊞ The joint FAB team also receives referrals for home visits on pensions matters from the Pensions Centre in Plymouth. This serves the Southern part of the South West, including Somerset.
- ⊞ The joint FAB team also undertakes financial assessments for Fairer Charging, and for Supporting People.
- ⊞ It undertakes assessments for Housing Benefits and Council Tax.
- ⊞ For customers, the FAB team means a huge improvement in customer care. Instead of the financial information being gathered by representatives of four or more different agencies at different times, the FAB visiting officers (FABO's) collect the information in one home visit, and, with the customers permission, pass it on to the other agencies.

- ⌘ One of the key roles of the FABO is to lift the burden of completing long and complex claims forms away from older people, their carers and families, and wherever possible to maximize their income.



Does The Joint FAB Team Contribute To The Overall Objectives Of Somerset County Council And The Pensions Service?

The Pensions Service used to have a more restricted vision of its purpose and overall aims, and this was the administration of benefits. However, the vision of what is required of a modern pensions service is very different. In the foreword to the Pensions Service 2003-04 Business Plan, Alexis Cleveland, the Chief Executive, talks about an organisation *"that makes full and effective use of the best balance of people and technology, that strives to make the world a better place, and is totally geared around achieving the best for its customers."* Specific reference is made to reducing poverty for today's pensioners, and promoting their independence and security.

Some of the shared objectives for Somerset County Council and the local health community in Somerset mesh extremely well with this new agenda for a modern Pensions Service. Our shared objectives include:

- Increasing social inclusion
- Enabling older people to live independently in their own homes for as long as possible
- Maximising income for older people living on low incomes or in poverty

These are high-level objectives, but they are already being delivered through the day-to-day work of the joint FAB team. On 88-90% of home visits, the older person will receive an assessment of charge notified at the time of the visit. For the majority (on average approx. 65%) this results in a reduction of charge. Also, a significant number of individuals are receiving considerable increases in income following the benefits checks.

When older people living on low incomes receive an increase that takes them out of poverty, our experience is that this can have a transforming effect on their quality of life:

- ⊖ Improved diet

- ⊖ Reduced anxiety about debt
- ⊖ Warmer homes, particularly in winter
- ⊖ Increased mobility and maintaining social networks, resulting in less isolation



- ⊖ Trips to family and friends, and even the occasional holiday become affordable.

Equally important is the drive for more efficient use of skilled staff time: another shared objective. For the joint FAB team both agencies have agreed new joint protocols for management of the team, and for the deployment of staff.

Effective use of IT is another important shared objective, and the joint FAB team is developing e-enabled services. Somerset is a participating partner in the National Benefits Project, funded by the local government modernisation team at ODPM. We are participating in the Pensions strand, and involved in development of e-enablement of Fairer Charging and e-enablement of Occupational Therapy services. These products will enable more efficient service delivery by the joint FAB team. In the longer run they will be an important factor in the national roll out of the Third Age Service.

A Robust Service Between The Joint FAB Team And Care Direct Somerset

There are strong links between Care Direct Somerset and the joint FAB team. Care Direct advisors make over 15% of total referrals received by the FAB team. For any financial and benefits matters, Care Direct, essentially a call centre operation, can use the FAB team as its home visiting arm. During home visits FABO's distribute leaflets giving Care Direct service details, and its 0800 444 000 free phone number. If they identify a customer's need for information or access to other services FABO's encourage customers to call Care Direct? For very frail or ill customers, the FABO's will refer people themselves to Care Direct. The two services work closely together. Each maintains its own complementary and specialist areas of activity. FABO's tell us that working alone on home visits to very ill or disabled older people can at first be a

daunting experience. Having Care Direct just a free phone call away is not only a real benefit for customers, but is a re-assurance, particularly for new FABO's.



The FAB Strategic Management Board, and the Care Direct Somerset Management Board are planning to merge. Both Boards have had their last meetings, and in January 2004, the first meeting of the new Joint Management Board will be held. This seems a natural progression, and the new Joint Management Board will be able to give both of these innovative teams a new strategic steer. Closer and more effective working to the benefit of older people and carers should result.

The Joint Board will consider proposals for:

- Joint training
- Joint promotion and outreach to older people and carers living in areas of high social and health needs
- Joint campaigns, such as winter warmth, falls prevention, Pensions Credit take-up, accident prevention in the home
- Increasing referrals between the teams in both directions

This is an imaginative and exciting agenda, which puts this *joined up government initiative* between the Pensions Service and the Somerset County Council at the cutting edge of Third Age service development nationally. The combination of Care Direct and the joint FAB team is considered as an embryonic Third Age Service, and is attracting national attention. Recently Malcolm Wicks, the Minister of State for Pensions, visited Somerset with his senior management team. They were keen to understand these new partnership arrangements and to see for themselves what impact they were having on the lives of individual older people.

A Case Study: How Does This New Joined Up Initiative Work?

A daughter rings The Pensions Centre in Plymouth with a question about her mother's pension. Mrs. C lives in an isolated house in the Somerset countryside. She is aged 78, and has hearing loss, so the Pensions Centre arranges a home visit from the joint FAB team.

During the home visit the FABO establishes that Mrs. C is eligible for Attendance Allowance and helps her complete the application form. Mrs. C lives alone in a rented cottage. Her daughter visits on a daily basis. Mrs. C has difficulty getting in and out of the bath. She has progressive arthritis and hypertension and has difficulty doing housework. She is on a low income. The FABO sends off the Attendance Allowance claim, and, with their permission, refers Mrs. C and her daughter to Care Direct.

The outcomes are:

- } Mrs. C. is now receiving Attendance Allowance at the lower rate.***
- } This also entitles her to an extra £42 pensions credit.***
- } This has a positive knock on effect on Housing Benefits and Council Tax.***
- } Care Direct referred Mrs. C for an Occupational Therapy Assessment, following which she now has bath aides, and a ramp with handrail leading to front and back doors, which means she has access to her garden again.***
- } Her daughter successfully applied for a Car Badge for the Disabled, and can now take her mother to the shops.***
- } Mrs. C. has received a letter from Care Direct, and a copy was also sent to her daughter. The letter gives contact numbers for the local Community Transport scheme operating in Mrs. C's area, and information about the local Community/Personal Alarm scheme.***
- } In addition, Care Direct sent a letter to her daughter with a Carers Information Pack, detailing help and support offered to carers, and a list of local domestic care agencies.***

What prompted the daughter's call to the Pensions Centre was a small query on her mother's pension. However, the real issue was that she needed a break from caring for her mother, but was anxious about leaving her even for a few days.

Because Mrs. C now has access to support from local services, and because she is now more independent than previously, her daughter has been able to go on a one-week holiday for the first time in four years.

Creative Culture Change: Forging A New Partnership

The joint FAB team went live one year ago. The manager of the FAB team, who had wide previous experience in the Department of Work and Pensions, describes what has changed for her:

"It feels like I have a new identity at work. I used to belong to a national organisation and still do, but now I feel I am really working for the local people of Somerset. As a manager I am more concerned about setting and achieving local targets rather than national targets. Somehow local targets are more achievable."

This describes very well subtle changes in her expectations and practice.

Recruitment of 30 w.t.e. staff for the FAB team was completed by January 2003. The local authority had contributed about a third of the staff, and the Pensions Service about two thirds. There was early reluctance by staff from different backgrounds to move into shared office accommodation. There were problems over sharing data between staff employed by different agencies. Although the local authority enabled Pensions Service staff to access and enter data onto the local authority customer database, the Pensions service was unable to offer reciprocal arrangements. Trying to work towards shared accommodation and information technology, local authority managers were frustrated by their perception of the slow pace of delivery from DWP staff. Looking back, these teething troubles seem well in the past. They have been replaced by a shared team approach, and considerable pride in what has been achieved.

So what were the main factors, which created an effective new partnership?

In their first year, the FAB team have taken on new responsibilities for *Fairer Charging Assessments, Supporting People Assessments, calculation of benefits entitlement, Housing Benefits and Council Tax assessments, disability related expenditure, and Pensions Credit*. All FAB visiting officers are required to undertake the full range of financial advice and assessment work, whatever their specialist knowledge beforehand. This has meant they have been on a very rapid learning curve.

This required:

- A high level of flexibility;
- Preparedness to share specialist knowledge;
- Taking part in a "buddy" system, so that for an apprenticeship period staff worked in pairs, with home visits undertaken with Pensions Service and local authority staff partnered with each other;
- Willingness to take part in a training and accreditation scheme to enable staff to make a safe transition to single home visiting.

The joint training, mutual support, and recognition that everyone has, areas of specialist knowledge and areas of uncertainty have all contributed to breaking down the early barriers.

Naturally, change on this scale was stressful. Despite written briefings and bulletins, managers were worried about key messages not getting through. It was decided within weeks of *go-live* in October 2002 that a team-building day was needed, not least to enable staff to express their hopes and fears for the new team. Fears included:

- ⊞ Not being able to retain all the information we have to take on board/
information overload
- ⊞ Speed of change - too much too soon
- ⊞ Lack of confidence
- ⊞ Managers spread too thinly
- ⊞ Too much work
- ⊞ Different terms and conditions of service might breed resentment
- ⊞ Fear of the unknown - *what else don't we know?*

It was important that managers listened and responded to the fears being expressed with a mixture of action and explanation. Written feedback from the day was given to all who attended. The team-building day was successful in that anxiety levels were reduced, and staff suggestions were acted on. Things started to move ahead more smoothly.

Strategic Management Of The Joint FAB Team

Having completed its task, the joint planning group was replaced by a FAB Strategic Management Board (October 2002).

Terms of reference were agreed:

- ♣ Membership includes senior managers from Social Services, the Pensions Service, Supporting People, and the Manager and Deputy Manager of the joint FAB team. We could have invited wider membership from other stakeholders, but decided to keep the board small. Relationships were still being worked out. A small group meeting monthly would be better able to address the issues arising in the early stages.
- ♣ Chairmanship rotates every six months, alternating between a Social Services manager, and a Pensions Service manager.
- ♣ Principal functions include:
 - *strategic planning and direction;*
 - *coordination between partner agencies;*
 - *monitoring and evaluation of delivery;*
 - *ensuring the views of users and carers influence service development;*
 - *ensuring best value;*
 - *making recommendations to partner agencies regarding resources for changing needs and service development;*

The Board reports to the Corporate Director of Social Services, and the Change Manager for the Pensions Service, South West region. In practice, the Board has been allowed to 'get on with it'. Throughout its first twelve months we have been fully engaged with issues such as integrating the four teams into joint accommodation; data protection and IT issues; the induction, training, and safety of staff; and setting priorities whilst taking on a considerable volume of new work. The partners have wanted to make it work, and much has been achieved in a spirit of constructive co-operation. It has not always been easy!

What Has Been Achieved For Our Customers?

- ⊖ There is a customer service culture. We know this from unsolicited letters or phone calls saying thank you. These have been received from an estimated 20% of customers! This is excellent for staff morale, and positively reinforces the new culture.
- ⊖ Since October 2002, despite early teething problems, and the need to train an expanding staff group, the team has generated at least

£2.4 million in new benefits for older people in Somerset

- ⊖ A promising start, but we believe that much greater increases in income are in the pipeline. For example, in the period April - June 2003, welfare benefits checks generated 642 Attendance Allowance claims. Only 2 were unsuccessful!
- ⊖ The strong links with Care Direct Somerset means that FABO's can put their customers in touch with a wide range of information, and help make access to services much easier. They are becoming expert at identifying other needs, as well as offering financial advice and help during the course of home visits.