

Right Benefit: Engaging with Customers

DWP Department for
Work and Pensions

How to use this guide

You can read through this guide like a book, or use the contents list (next) to go directly to those sections you are particularly interested in. Clicking on an entry in the contents list will take you to that section.

Finding your way around

Introduction: Introduces the four step engagement process.

The next four sections provide guidance on each stage in the process:

Establishing a strategy

Designing engagement

Delivering the messages

Review and evaluation

Making compliance easier: provides guidance on how you can make it easier for customers to report changes to you.

Other resources/useful links: provides links to other resources and guidance you may find useful.

Detailed guidance on methods: provides some more detailed information about a range of engagement methods, their strengths and weaknesses, tips for improving their effectiveness and examples of their use.

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Introduction

Engagement – an overview

There are four main stages to developing and implementing an engagement strategy. These stages are relevant to all forms of communication, from a campaign to get a key message across to customers, to briefing a group of staff. They are:

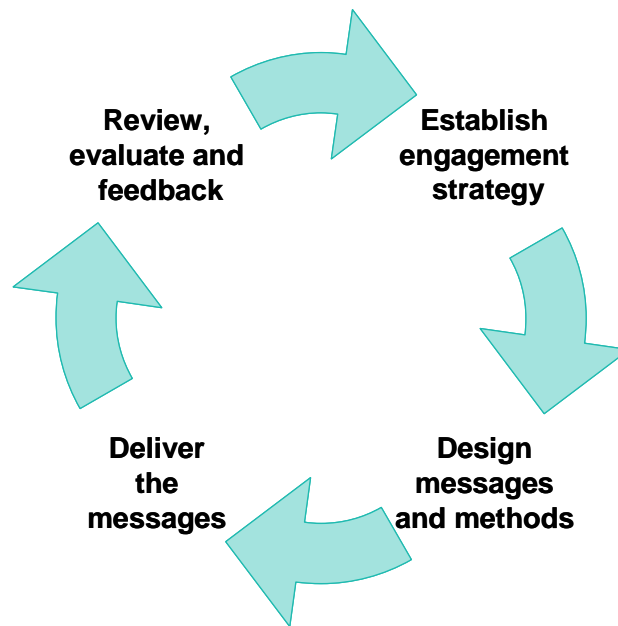


Figure 1: Developing and implementing an engagement strategy

Establish an engagement strategy: Identify what you need to communicate, to whom.

Design engagement: Identify suitable opportunities for engagement, and develop, design and test the messages and materials.

Deliver messages: Identify how to distribute the materials you have developed, and the supporting processes you need to make sure the messages reach your target audience.

Review and evaluate: Plan to review and evaluate as an integral part of the engagement strategy.

While the concepts and guidelines presented are aimed at engagement relating to right benefit, they are relevant to a wide range of situations and you may find them useful in other areas of communication.

The next four sections look at each stage in more detail.

The engagement strategy

Getting any message across requires thought and planning. A clear strategy ensures that your engagement activities support, and are consistent with, corporate strategy, and sets out the framework within which staff will work by identifying:

- the purpose of engagement;
- the key messages;
- different target audiences with different needs for engagement; and
- how partners can help deliver and reinforce messages.

Identify the purpose of engagement

Engaging with customers helps to:

1. overcome barriers to timely reporting;
2. create and reinforce a culture of self reporting.

The first step in developing a strategy is to identify which sources of customer error are of concern and why, for example are errors associated with particular:

- groups of customers or situations;
- types of change?

You can collect the information you need in a number of ways:

1. ask your frontline staff and partners;
2. ask your customers;
3. analyse system data e.g. changes identified by reviews.

For more guidance on data sources and analysis refer to [Best Mix](#).

Figure 2 illustrates a number of the barriers that can prevent customers reporting changes in their circumstances.

Clear messages help to remove confusion. Customers may not be clear about the changes they have to report for HB, as they can be inconsistent with the changes they have to report for other benefits, tax credits or pension credit. *Research suggests that this is an important reason why customers fail to report changes, or fail to report them straight away.*

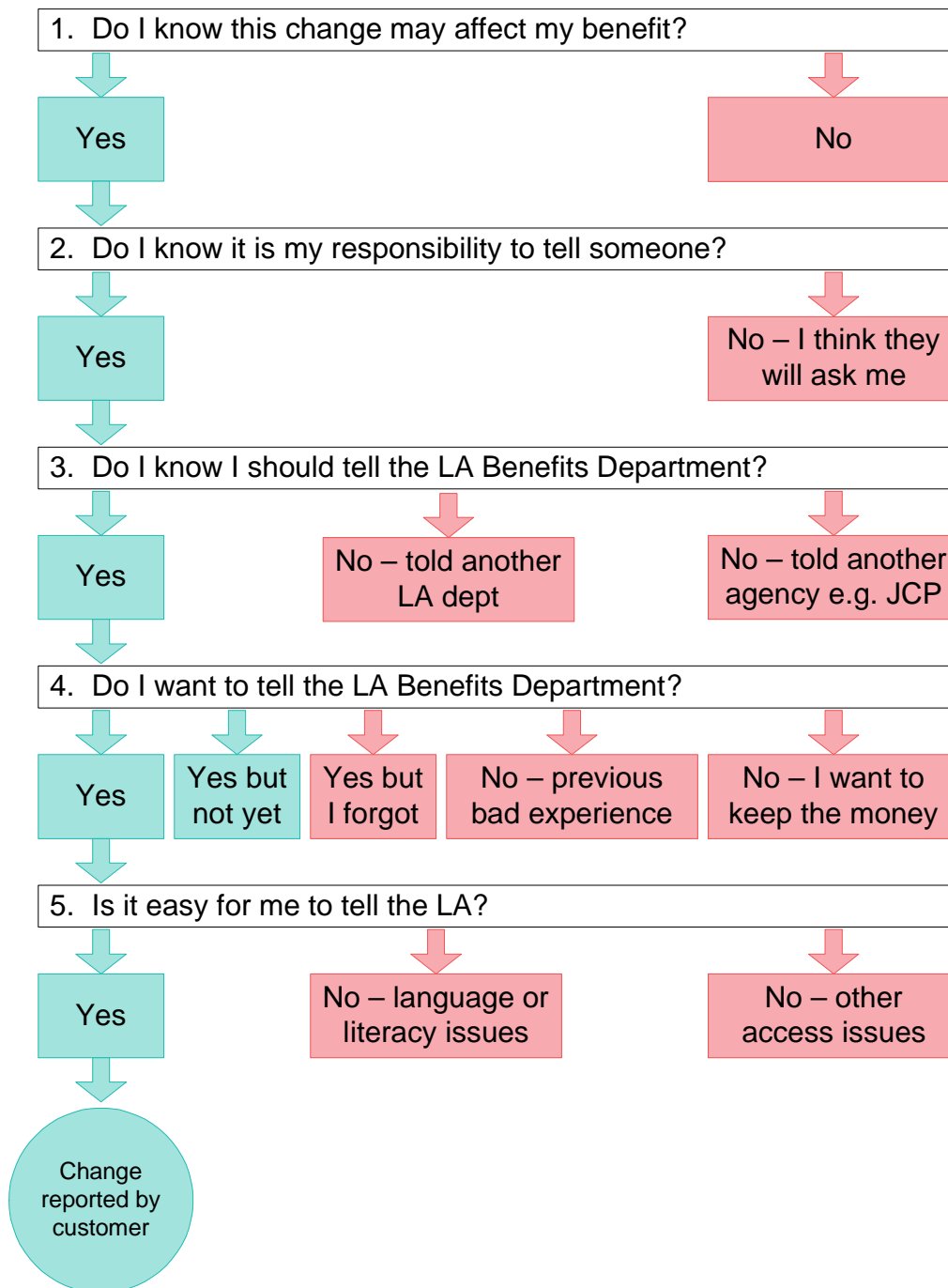


Figure 2: Barriers to reporting of changes

Identify key messages

The message is the specific information you need to communicate to address the sources of error identified.

It may be detailed information to tell customers:

- that it is their responsibility to report changes in their circumstances;
- what changes to report;

- why they have to report them;
- when they need to report them;
- whom they need to report them to and how they can report them;
- what the consequences are if they do not report them;
- what to do if they are unsure.

Alternatively, the key message may be a brief reminder of customers' responsibilities and how they can get more information.

Having a clear understanding of the message helps ensure it can be communicated effectively and reduces the risk of people receiving inconsistent messages from different sources.

In all your communications it is important to make it clear that the customer must report the change not simply to the Council, but to the Council Benefits Service. You also need to remind your customers to report changes to Jobcentre Plus or The Pension Service where appropriate.

In the Social Security Commissioner's decision CH 2567 2007 published on 27 March 2008, one of the factors leading to an overpayment being held to be a result of official error was that neither the claim form nor subsequent letters, including the decision notices, made it clear that the designated office was the Benefits Department. They referred instead to the importance of telling 'the Council' or 'us'. The customer had told the Council's Housing Department, who had not passed on the information to the Benefits Department.

The detail of the messages, and how you communicate them, will depend on a number of factors including:

- any particular issues you have identified
- the timing and circumstances of customer engagement, and
- the target audience.

Identify target audiences

Attitudes, behaviours, knowledge and communication skills are key factors in determining what messages people need, what messages they will listen to and how people will perceive the messages you present.

There will usually be one or more clearly identifiable groups who:

1. need different information; or
2. have particular accessibility needs.

Use the checklist in Table 1 below to help identify target audiences, taking into account local factors.

You will need to balance the advantages of tailoring messages for small target audiences against the disadvantages of trying to cater for a large number of audiences.

Table 1: Identifying target audiences

<p>Information need</p> <p>Customers who may benefit from more specific information about particular changes of circumstances or reporting methods:</p> <ul style="list-style-type: none">• pensioners;• people with young children;• working customers, students.
<p>Access and accessibility issues</p> <p>Customers who may find it more difficult than others to report changes of circumstances include those:</p> <ul style="list-style-type: none">• with literacy issues;• whose first language is not English;• with visual impairment or hearing difficulty;• with limited mobility;• whose lifestyle makes access difficult, including working customers, customers with young children, customers in rural locations

To help inform the design of your engagement initiative, try to establish:

- how many people fall into each group;
- who they are and how you interact with them.

Working with partners

Include in your strategy how you will work with partners to improve communications. Partners can influence your success in establishing changes of circumstances in three key ways:

- by communicating with your customers to remind them about reporting changes of circumstance;
- by forwarding information about changes they know of directly to you; and
- by helping you communicate with more difficult to reach customers.

Some organisations advise potential and existing customers and help them to understand the system – they can help to educate customers. Working with them will ensure that the advice they offer is consistent with the messages you are delivering to customers.

Partners include:

- other departments in your LA, such as housing;
- other public agencies, such as Jobcentre Plus, The Pension Service and Her Majesty's Revenue and Customs;

- managers of locations such as libraries, leisure centres and health centres;
- landlords, including housing associations and private landlords;
- welfare rights organisations and your local Citizens Advice Bureau.

Remember you need to remind your customers to report changes to Jobcentre Plus or The Pension Service where appropriate.

Signposting to other agencies

The following are examples of signposting to other agencies.

Do I need to tell anyone else about my changes?

Yes, you do.

If you get Income Support, Jobseeker's Allowance or any other social security benefit, you need to tell Jobcentre Plus straightaway about your change.

If you have moved, we always check if you are getting these benefits at your new address. If Jobcentre Plus don't know that you've moved, it might hold up your claim with us.

Providing links

If you are under 60 and you get any other state benefit you also need to tell Jobcentre Plus about any changes in your circumstances. You can use this link to look at their website.

If you are 60 or over, you must also tell The Pension Service of any changes and they will tell you how the change will affect you. You can use this link to look at their website. If the change is something which was not included in your Pension Credit calculation, you must tell us not The Pension Service.

Training and supporting materials for partners

One LA told us that they provided training for several partners who hand out claim forms and change of circumstances report forms to customers. To back up training, they distributed mouse mats summarising the key points. These are a useful, immediately accessible reminder for the LA's partners.

Designing engagement activities

This step involves:

- identifying suitable opportunities for engaging with customers;
- identifying methods and materials that are within the scope of your budget;
- considering the structure, content and style of the messages; and
- developing and testing the messages and materials.

Identifying suitable opportunities and methods

There is a range of different methods you can use to get messages across to customers. Look for new ways to:

- create or raise awareness of responsibilities and the importance of reporting changes;
- find out about likely changes;
- reinforce desired behaviours.

1. Identify existing opportunities

Table 2 identifies opportunities for customer contact in a typical customer “journey”.

Table 2: Opportunities for engagement

For each step in the customer journey:	Consider the following opportunities:
<pre> graph TD subgraph Prospective_customer [Prospective customer] A[Thinks about claiming] --> B[Applies] end subgraph New_customer [New customer] C[Benefit awarded] --> D[Residency checks] end subgraph Current_customer [Current customer] E[Reports a change] --> F[Review / follow-up] end B --> C D --> E </pre>	<p>Customer views website Customer contacts, or is contacted, by telephone or post Customer visits office/ one stop Customer visits information point or other location (doctor, library) Customer visited by Housing Benefit staff</p> <p>Customer:</p> <ul style="list-style-type: none"> • visited by welfare officer or take-up team/officer; • seeks advice from third party (e.g. housing, CAB, landlord). <p>[Requires awareness raising with third party/ voluntary agencies]</p>

2. Look for ways of making more effective use of existing opportunities

Do you use all of your current contact opportunities to remind customers to report changes?

- Are you using the earliest opportunity to tell customers of their responsibilities? Many LAs tell customers about their duty to report changes as soon as they claim benefit.
- Do you use interventions to engage customers? For example reviews present a valuable opportunity to target key messages to customers who particularly need information and to remind them of their responsibility to report changes in circumstances.

Do you make the most of your current contacts?

- Do you use your initial contact to establish your customers' preferred communication methods?
- Could you improve your current materials to give your messages more impact (see Developing the message and materials below)?
- Could you enclose inexpensive materials such as a one-page flyer with existing communications?
- Do you ask customers to formally acknowledge that they understand their responsibilities – i.e. by asking them to sign a written undertaking?

3. Look for additional opportunities for communication

You do not have the same degree of contact with all of your customers - for example, you may have few opportunities to communicate with customers who claim HB through Jobcentre Plus and The Pension Service. Consider not only how you use the opportunities you do have but how you can create new opportunities. For example:

- Are you making best use of approaches that reach a large number of customers such as:
 - targeted postal reminders, e.g. to those on tax credits in July or August;
 - putting posters and leaflets in places your target audiences use;
 - broadcasting radio adverts at the best time of day or year to reach your target audience?
- Are there particular locations that offer good opportunities for communicating with your harder to reach customers, such as:
 - community and cultural centres;
 - sheltered housing;
 - GP surgeries;
 - leisure centres;
 - pre-school nurseries?
- Are you making the best use of your website? In the case of Housing Benefit, harder to reach customers are likely to be those who are in work and not in touch with usual agencies. They may be more likely to use the website. Is the information they need easily accessible?

- Are you making the best use of partners? Can landlords or organisations that offer welfare benefit advice etc help you get messages across?

Packaging a message in two or three different ways helps to communicate it to more people and to reinforce its importance.

Table 3 identifies different methods you can use. More information on strengths and weaknesses, tips for improving their effectiveness and examples of their use can be found by clicking on the links.

Table 3: Types of engagement

One-to-one		One-to-many	
Face-to-face	Letters and flyers	Information packs	Posters and leaflets
Signed undertakings	Telephone communications	Targeted mailshots	Radio advertisements
Text messages		Forms	Other media
Communicating with staff and partners		Presentations or benefits forums	Methods in combination
Briefings and training sessions	Reminders	Websites	
Websites and e-learning			

Developing the message and materials

Examples of messages and links to materials used by some LAs are provided in the blue boxes. The [Example Materials](#) document provides more ideas used by other LAs and some examples of materials produced by them. It also provides a checklist to help you review your materials and messages.

When developing or tailoring materials for your use check that you apply the principles of good communication described in the following sections. You will need to consider:

- content;
- structure;
- style, and
- access issues.

Make full use of any communications professionals in your organisation and test new materials on a small group of customers before rolling them out to ensure the messages are understood as you intended.

Message content

Keep your messages clear, positive and relevant. People take more notice of messages that are relevant to them, that demonstrate positive benefits and where actions required are made clear.

The key messages are relatively simple (see box), however the detail of the contents of any message will depend on a number of factors including:

- the target audiences you have identified;
- why the messages are needed, and what else is happening that might affect your message.

Key messages

The key message for customers is that it is their responsibility to report changes in their circumstances. They also need to know:

- what changes they have to report;
- why they have to report them;
- when they need to report them;
- whom they need to report them to and how they can report them;
- what to do if they are unsure;
- if they need to tell someone else for example JCP, HMRC or TPS.

Keep material relevant to your audience. Use examples to illustrate important points using circumstances that are similar to those encountered by the audience. *Tailor communications as far as possible to the individuals.*

Tailoring messages for groups

Relevant messages for pensioners not claiming Pension Credit would be:

Changes in Circumstances (if you are receiving Pension Credit)

If you receive the guaranteed part of Pension Credit, you must tell us if:

- a partner moves in or out;
- you or your partner go into hospital or residential care;
- anyone else comes to live with you; or
- your rent or tenancy details change.

If you receive the savings part of Pension Credit, you must also tell us if:

- your savings go over £16,000; or
- you are away for more than 13 weeks.

Tailoring messages to individuals

References to child benefit, for example, are unlikely to be relevant to pensioners. You should be able to use your benefits systems to place customers in broad categories so that you can send individuals messages about the types of changes most relevant to them.

Use clear and appropriate language. The style of messages should be appropriate for your target audiences. Messages written in bureaucratic or complicated English are less likely to be interpreted correctly and understood as intended. *Use clear and appropriate language at all times and avoid jargon.*

Written material that follows the principles of Plain English is clear and easy to read and understand. The Plain English Campaign has free guides available on its website, and also offers training, and training materials (see below).

<p>Using Plain English</p> <p>Many LAs across the UK, have achieved the Crystal Mark for New Claims and Changes of Circumstances forms. The Crystal Mark is awarded by the Plain English Campaign to documents that meet its guidelines. Writing in Plain English helps make forms, letters and other documents easier to read and understand. One LA explained that they try to ensure that as many letters to customers as possible are screened by a trained member of staff to make sure that they are written in Plain English. The Example Materials document provides examples of Crystal Marked materials.</p> <p>The box below shows examples of sentences written in Plain and non-Plain English. It also gives some examples of words to avoid, and their Plain English alternatives, suggested by the Plain English campaign. Find out more about Plain English at http://www.plainenglish.co.uk/index.htm.</p>	
<p>Not Plain</p> <p>To enable your entitlement to benefit to be calculated, the following information is required.</p> <p><i>This uses passive verb constructions and is impersonal.</i></p> <p>Changes must be notified within one calendar month.</p> <p><i>Here, using a passive verb means that it is not clear who is responsible for notifying changes.</i></p>	<p>Plain</p> <p>We need the following information so we can calculate your benefit entitlement.</p> <p><i>The use of active verb constructions makes this alternative shorter and easier to read.</i></p> <p>You must tell the Benefits Department about changes straightaway.</p> <p><i>This makes it clear who is responsible.</i></p>
<p>Words to avoid</p> <p>Advise us Applicant Complete Comply with Forward</p>	<p>Alternatives</p> <p>Tell us You Fill in Keep to Send</p>

Use positive messages and language. *Encouraging positive behaviour and highlighting the advantages for customers of reporting changes on time generally results in longer term changes in attitudes and behaviours.*

Remember it is important to make the consequence of late reporting clear, but don't let this be the first message a customer encounters. Negative messages can intimidate customers and may discourage them from reading on.

Using positive language makes messages sound helpful, upbeat, and encouraging. Positive language points out the advantages of positive action, rather than the downside of failing to act, and tells people what they should do, rather than what they have failed to do. Negative language, on the other hand, can discourage, pointing out barriers and problems.

Emphasise what customers CAN do and not what they CAN'T do. Highlight the advantages of reporting changes on time, for not doing so and be polite!

Examples of positive and negative messages and language	
<p>Negative</p> <p>It is an offence not to tell us about any change of circumstance that affects your benefit. We may take court action against you and if we pay you too much you will probably have to pay it back.</p> <p>If you fail to promptly report a change in your circumstances you are committing a criminal offence.</p>	<p>Positive</p> <p>If your circumstances change please remember to tell us straight away. The change may mean that you are eligible for more benefit. If it means that you get less benefit, it is better you find out as soon as possible - rather than later when we may have paid you too much and have to claim the overpayment back!</p> <p>It is very important to tell us about changes straightaway so that we can pay you the right amount of benefit. We may be paying you too little and you could miss out on money you are entitled to.</p> <p>What happens if I don't tell you about changes?</p> <p>If you don't tell us, we're likely to go on paying the same rate of benefit as before and this may be wrong.</p> <p>We may need to change the amount we pay you, or stop your benefit completely because of a change.</p> <p>If you don't tell us, or are slow to tell us, we may have paid too much. We will expect you to pay it back, and we may take it out of the benefit we're still paying you.</p>
<p>We cannot process your change of circumstances unless you provide supporting evidence.</p>	<p>We can process your change quickly if you bring in the evidence we need as soon as possible.</p> <p><i>If the customer submits a claim form with all necessary information and evidence, some LAs promise to process it within a certain period of time.</i></p>

Escalate messages if necessary. Research suggests that most customers want to comply with the rules so in most instances they simply need to take the opportunity to remind customers of the types of changes that must be reported, leaving supporting information such as a leaflet or change of circumstances reporting form. There will be occasions, however, where the LA suspects deliberate non-reporting and in such circumstances you should make the potential consequences clear. Visiting officers carrying out reviews should tailor the message they deliver to the circumstances.

Do not overload your audience. *If you try to deliver too many messages at once, they may not all get through.* People tend to pick out the messages that are loudest, or those that seem to be most relevant or important to them.

Match messages to methods. Posters and radio advertisements are best used to deliver a single core message such as that shown for pension age customers above, supported by information on how to find out more.

Longer and more detailed messages are better delivered in leaflets and letters. However if a letter contains many different messages key information may not get through effectively. Your customers may pay more attention to the first messages they read, or to those that are most important to them. *Separate out different messages to make them stand out.* For example, a message about changes of circumstances can be placed on a separate flyer rather than in the text of a letter whose main message is on another topic.

Making the message stand out

Most, if not all, LAs tell new customers about their responsibility to report changes of circumstances in decision notices. However, decision notices are often quite long, and contain several messages. The customer will be most interested in finding out how much benefit they have been awarded and when they will receive their first payment, and may take little notice of other messages in the letter. One LA showed us the template that they use whenever they write to a customer with a query, or seeking information. It includes a reminder about reporting changes of circumstances, clearly presented on separate pages.

Message structure and presentation

Information presented in a clear, logical, well-ordered way is easier to understand. Interesting presentation is more likely to get and hold attention.

Think about how the message is structured, and the order in which you introduce information.

Think of things from a customer's perspective, for example will someone who has started work, got married, or just retired be able to find the information they need?

Break longer messages up into sections such as:

- background;
- main information;
- summary.

Remember that the amount of time or space you assign to each topic can indicate how important you think it is.

Avoid burying information in long unstructured lists e.g. lists of FAQs.

Structuring messages – Identifying changes to report

Customers need to know what changes to report. Make sure the information is easy to find and order changes logically for example by separating them into:

- household changes;
- income details;
- accommodation changes;
- other.

Try to separate out those that refer to different groups of customers e.g. those receiving Pension Credit and those not receiving Pension Credit.

For **briefings or training sessions** (e.g. for staff and partners) consider using the 'News at Ten' approach:

- tell them what you are going to tell them;
- tell them;
- tell them what you just told them.

Leave time for discussion and do not leave all the important things to the end. If you overrun you may have to miss some things out, and rushing a topic can give the impression that it is not important.

For both **presentations and written material** interesting presentation is more likely to get and hold attention. For example, using a mixture of words and images makes presentations more interesting, while for training, interactive DVDs can add interest.

Accessibility

Consider the following accessibility needs:

- Visually impaired customers - do you need to produce, or have the capacity to produce when needed, audio tapes, or Braille publications? The box below includes a link to the RNIB website, which gives advice on clear print.
- People with literacy issues - following the guidelines on style above will help, as will providing a telephone help line as well as opportunities for face-to-face contact.

Providing a clear council logo and telephone help line numbers on all written communications will help both the visually impaired and those with literacy issues.

- Hearing impaired customers - make sure that these customers know your textphone or minicom contact details.
- People for whom English is not their first language - see the box below for links to useful resources from the National Leaflets project.

Helping the visually impaired

The RNIB website is a useful source of information on designing printed information that is accessible to customers with sight problems. RNIB's clear print guidelines cover basic design aspects such as font, type size and contrast. The RNIB website also includes more general information on formats and communication methods. <http://www.rnib.org.uk>

The National Leaflets Project website (see below) has a link to the RNIB Transcription Centre to help LAs who would like copies of their leaflets in Braille or large print.

The National Leaflets Project

Clearly, communicating effectively with customers whose first language is not English presents additional challenges. On the National Leaflets Project website (<http://www.benefit-leaflets.org/home.asp>), you can access leaflets containing advice and guidance about different aspects of Housing Benefit and Council Tax Benefit in a number of languages including:

- Arabic
- Bengali
- Chinese
- Gujarati
- Polish
- Punjabi
- Somali
- Urdu
- Vietnamese
- Welsh

Delivering the message

To ensure that messages are delivered to your target audiences, you will need to be satisfied that:

- your systems and processes support your engagement strategy;
- distribution mechanisms are effective – i.e. they get materials to the places where your audience will see them, and
- your staff and partners understand and can reinforce the key messages.

If encouraging action by many customers (e.g. through a radio advert or targeted mail shot) you will need to *make sure your back office is prepared and able to deal with enquiries*. It is therefore important to consider timing of any campaign.

Modifying systems and processes

Review your systems and processes to identify any changes needed to support improved communications. For example to:

- identify customers that fall into particular target audiences, including customers with needs such as documents and letters in large type or in Braille;
- update letter templates to include additional pages with additional information;
- personalise letters to a customers specific situation;
- distribute posters or leaflets and ensure they are displayed effectively and replaced when necessary.

Updating templates

One LA makes it easy for staff to include additional information on letters they send to customers by including additional pages on its standard template for letters. The template is reviewed at regular intervals to make sure it is up-to-date.

Making your messages stand out

Make sure your messages aren't swamped or confused by other messages.

Consider:

- the location and context of leaflets and posters;
- timing.

Plan how and where you are going to display posters and leaflets. If your poster or leaflet is simply one of many about many different topics, this will reduce its impact. *Plan to refresh designs frequently. New leaflets and posters will attract more attention.*

Making people look twice

Some LAs change the look of their standard leaflet for customers on the importance of reporting changes of circumstances, regularly changing the image on the front so that it looks different and new.

You should give careful consideration to the timing of communications. *Your messages may be overlooked if they are sent when your customers are receiving lots of communications from the LA about other topics.*

The importance of timing

One LA explained that to ensure maximum impact and reduce expenditure it sends out its standard leaflet on changes with annual uprating decisions and entitlement letters, and then targets different groups at different times of the year:

April	Seasonal workers	August	Earned income
May	Occupational and private pensions	September	Non-residence – end of season
June	Capital and earned income	October	Minimum wage increase
July	Tax credits	November	Christmas changes.

Reinforcing key messages

Customer-facing staff, particularly those in your partner organisations may require information to help them deliver consistent messages to your customers and tailor messages to local circumstances. Consider providing:

- background information to explain the rationale underpinning the need to encourage customers to report changes of circumstances promptly;
- briefing or training sessions to explain the messages that customers need and the advantages to partner organisations and to customers;
- reminders such as posters, leaflets or scripts, mouse mats, coasters, mugs etc.

Make sure you have a directory of partner organisations, with contact details, and a process to keep it up-to-date.

Review and evaluation

Regularly review your materials and web-pages to keep them up to date. Check that phone numbers are still correct, and that links on web-pages still work.

Some recent changes to check

- Check that you make it clear that customers must report changes to the HB Section, or list the designated offices for reporting changes. Change any reference to telling “The Council” – check all web-pages and downloadable documents as well as printed material
- Update terminology – remind customers to report their changes to Jobcentre Plus, The Pension Service and HMRC where appropriate - use the correct names for these organisations
- Check that your information refers to Local Housing Allowance if appropriate and from October 2008 Employment & Support Allowance.

Review the content and presentation of you materials against the checklist provided in the [Example Materials](#) document.

Periodically test that messages are being received and understood, and that customers, partners and staff are acting on them.

Plan evaluation as an integral part of the communications strategy. This will help ensure that data to inform the evaluation can be collected. For further information see [Evaluating Initiatives](#).

Making compliance easier

Make it straightforward for your customers to comply with their responsibilities and report changes to you as soon as they can.

A number of barriers that can deter customers from reporting changes are identified in Figure 2. Education and engagement can help overcome these barriers. However, there are other things that LAs can do, and have done, to make it easier for customers to report changes.

Providing - and making sure customers know about - a number of ways in which changes can be reported can make it easier.

Make sure access issues are identified and minimised. Useful guidance on communicating with disabled customers is available at: <http://www.officefordisability.gov.uk/resources/imagesofdisability.asp>. Local partners e.g. Help the Aged will also be able to help you address accessibility issues.

You probably offer most of the options listed below:

Making communication easier	
Face to face contacts	<ul style="list-style-type: none"> • use your initial customer contact to record the customer's preferred contact methods (for example would they like to receive text messages to remind them of appointments); • provide extended opening hours and a range of reporting locations • provide an option for e.g. working customers to make out-of-hours appointments • enable partners to accept reports of changes of circumstances; • provide home visits for those who need them; • ensure office addresses, opening hours and location maps are readily accessible.
Telephone and electronic communications	<ul style="list-style-type: none"> • accept reports by telephone - Circular HB/CTB A18/2006 provides guidance on making claims, amendments and change of circumstances notifications by telephone or electronically • provide an answerphone service for out of office hours reporting or when lines are busy; • provide a benefits enquiry line, which can be used by those who want to ask whether a particular change should be reported; • provide on-line reporting, or a downloadable reporting form • make sure information on web-sites is easy to find and well structured (with links);check that the website's search engine directs customers to the most appropriate pages.
Postal communications	<ul style="list-style-type: none"> • provide pre-paid or licence paid envelopes, a freepost service, or a dedicated drop box in your benefits reception area or one stop shop;

The boxes that follow contain a range of ideas that LAs use and believe to be helpful.

Taking changes by telephone

For many customers, reporting changes by telephone may be easier and more convenient than visiting an office or reporting by post. Customer groups for whom this might be particularly useful include those with mobility problems, those with visual impairment, people with literacy issues, and working customers.

Many LAs have started to accept reports of changes of circumstances over the phone. For example, one LA told us it accepts several types of change by telephone without written evidence:

- where the customer moves outside the LA area;
- withdrawal of a claim;
- cases where capital exceeds the upper threshold;
- changes where, for example, income can be checked on CIS.

Where customers phone in with a change that requires written evidence to be provided, the telephone can provide a useful starting point for the process.

[Circular HB/CTB A18/2006](#) provided guidance on making claims, amendments and change of circumstances notifications by telephone.

Improving accessibility

Make it easier for customers to report changes by publicising on your changes of circumstances form the many ways in which changes can be reported. On one example:

- one page is devoted to panels in ten different languages telling the customer how to have the form translated into another language
- another panel uses large type to let the customer - or someone helping them - know of other formats that they can request, including audio tape, Braille, large print and computer disk
- a separate page includes the addresses and opening times of the locations that customers can visit to report changes of circumstances in person. Several of these open until 6pm on some evenings, making it easier for working customers to report changes in person.

As a minimum ensure that the council logo and phone number are prominently displayed.

Encouraging returns

One LA sends every new customer a changes of circumstances pack thirteen weeks after their first decision notice. They include a pre-paid envelope to make it easier for customers to return the form.

Using a range of methods

Another LA has developed a range of ways to make it easier for people to report changes of circumstances.

- It offers early and late appointments for working customers, and anyone else with a genuine reason for requesting an 'out of hours' appointment.
- A visiting officer regularly attends the local SureStart Centre*; many parents use the opportunity to tell the visiting officer about changes. If supporting evidence is provided, the visiting officer takes the evidence back to the office to scan in. The visiting officer then posts the evidence back to the customer, or returns it in person if necessary. (*In England, Sure Start Children's Centres are places where children under 5 years old and their families can receive integrated services and information, and can access help from multi-disciplinary teams of professionals.)
- They introduced a dedicated postbox in the Benefits customer enquiries reception area. Customers feel more comfortable leaving changes of circumstances and valuable documents here in the knowledge that this is handled by the benefits staff and does not get mixed up with the central postal system within the town hall. In addition customers can choose whether to arrange to call back and collect any items they leave, or to have any such items returned to them by mail.
- Some changes are taken by telephone, and advice is offered over the telephone for customers who need to bring evidence in, resulting in fewer wasted journeys, a better customer experience, and a smoother process for the LA.

Some useful links

Example materials

The [Example Materials](#) document provides more ideas used by other LAs and some examples of materials produced by them. Others are examples from a “mystery shopping” exercise, looking at changes of circumstance on LA websites as part of a wider DWP website review. While no formal evaluation of the use of the materials has been carried out, the LAs that use them believe they have contributed to improving and maintaining customer reporting of changes of circumstances.

Error awareness e-learning

There is some useful advice on communicating with customers in DWP’s Error Awareness e-learning package. The Assessor’s Guide is aimed at all benefits staff, such as assessors, visiting officers, receptionists and call centre staff, who come into contact with customers. The Manager’s Toolkit is aimed at benefit managers and supervisors and covers topics such as managing workload, educating customers and using resources.

<http://www.dwp.gov.uk/housingbenefit/security/error-awareness.asp>

Taking reports of changes of circumstances by telephone or electronically

Circular A18/2006 provided guidance on making claims, amendments and change of circumstances notifications by telephone or electronically.

<http://www.dwp.gov.uk/housingbenefit/user-communications/circulars/2006/A18-2006.pdf>

Plain English Campaign

The Plain English Campaign has free guides available on its website, and also offers training, and training materials:

<http://www.plainenglish.co.uk/index.htm>

National Leaflet Project

The National Leaflet Project website was developed by Dover District Council for all LAs to use. It contains a range of free HB leaflets that you can download and customise, or you can order printed materials direct from the project.

<http://www.benefit-leaflets.org/home.asp>

RNIB

The RNIB website is a useful source of information on designing printed information that is accessible to customers with sight problems. RNIB's clear print guidelines cover basic design aspects such as font, type size and contrast. The RNIB website also includes more general information on formats and communication methods.

<http://www.rnib.org.uk>

Office for Disability Issues

You will find useful guidance on communicating with disabled customers at:

<http://www.officefordisability.gov.uk/resources/imagesofdisability.asp>

Guidance on methods

Face-to-face contacts

These provide an excellent opportunity to ensure that customers understand their obligations and to provide leaflets or other materials to reinforce the message.

Use key message scripts to ensure that staff and partners deliver a consistent set of key messages about changes of circumstances.

Make sure information on the address, phone number and opening hours of all designated HB offices is readily available to customers and kept up-to-date.

The DWP's [Error Awareness e-learning package](#) provides ideas for making best use of face-to-face contact with customers.

Making better use of face-to-face contacts

Most HB/CTB claim forms include information on the importance of reporting changes of circumstances, which starts educating the customer. However, seeing customers face to face provides an additional opportunity to tell them in person.

One LA told us that it sees many of its new customers face-to-face when they apply for benefit in person at the Housing Benefit Office. Assessment officers take new claims at the front desk, and make a point of telling customers that they must report any changes in their circumstances straight away. The LA thinks that taking advantage of face-to-face communications has helped them to achieve excellent reporting by customers.

Another LA has held awareness sessions for both staff and partners about the importance of identifying changes of circumstances. This emphasises the importance of normal everyday conversations with customers as opportunities to raise awareness.

Many claim forms include information on the requirement to report changes of circumstances as soon as they happen. However, if a customer makes a new claim in person, then at many LAs staff also use this opportunity to make clear customers' responsibilities.

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Signed undertakings

Some LAs have developed one page statements telling customers what changes they need to report and reminding them that it is their responsibility to report changes immediately. Some LAs include a separate statement on the claim form. The statements typically include contact and reporting details and describe the possible consequences of failing to report changes. Customer services staff read the statement out to customers and ask them to sign it. Statements can be used by customer services staff and by visiting officers.

A signed statement

One LA told us that in early 2006 it introduced a new element to intervention visits. The council developed a double-sided, one page statement relating to changes. It tells customers what changes to report and reminds them that they should report changes immediately. It includes a postal address, telephone and fax numbers, a minicom number and a low rate number for those calling from outside the local area. On the reverse side five bullet points remind customers of their responsibilities, advise them to contact the Housing Benefit Helpline if they are not sure whether a change needs to be reported, and tell them about the possible consequences of failing to report changes.

At any home visit where the customer has not previously signed the statement, the visiting officer reads it aloud at the start of the visit. The customer and the visiting officer sign and date the statement, and each keeps a copy. Following initial rollout, the statement was introduced at Customer Services offices. Customer services staff read the statement aloud to each new applicant, and both the customer services officer and the customer sign and date the statement. The applicant keeps a copy of the statement.

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Letters and flyers

Use letters to remind people of their responsibilities and reinforce messages already delivered. You can tailor letters to the individual or include standardised one-to-many messages in routine communications such as decision notices.

If a letter contains many different messages key information may not get through effectively. Your customers may pay more attention to the first messages they read, or to those that are most important to them. It is better to separate out different messages to make them stand out. For example, a message about changes of circumstances can be placed on a separate sheet or flyer rather than in the text of a letter whose main purpose relates to something else.

Separate **flyers** can be used to reinforce messages and can be routinely included in postal communications at relatively low cost.

A reminder in every letter

One LA showed us a flyer (about the same size as a 'With Compliments' slip) that it includes in every postal communication to customers. The flyer is printed in black on yellow glossy paper, and so has visual impact. The wording is high-level and generic – it reminds customers to tell the Benefits Section immediately about changes in 'your and your household's income, capital and circumstances.' The flyer also includes a contact email address and a telephone number, making it easier for customers to report changes.

Similarly, another LA told us that whenever they write to a customer they enclose a reminder about reporting changes of circumstances clearly presented on separate pages. One page tells customers what changes they need to report, and why. The next includes accessibility information; a section in large print gives a phone number to call for versions in Braille, large print or on audio tape, together with details in several different languages of how to obtain a translation. The final page lists all the One Stop Shops that the customer can visit, with addresses and opening hours.

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Telephone communications

Telephone communication is quicker than sending a letter and is often more effective, allowing two-way communication in one exchange.

Use scripts or checklists to ensure consistent messages are delivered, particularly where you use contact centre staff who may not have detailed knowledge of HB.

Some time ago, DWP commissioned a piece of research which concluded that customers preferred to use the telephone to contact the council about their HB claim. Accepting changes of circumstance by phone could therefore increase customer reporting. Circular HB/CTB A18/2006 describes new powers allowing LAs to accept changes of circumstance electronically (i.e. without a signature).

If you accept telephone reporting, make this clear on information leaflets, posters and your web-site, giving a general benefit enquiry phone number as well as a dedicated phone number for reporting changes.

Using the telephone to seek evidence

Most LAs receive a number of reports of changes of circumstances that are not accompanied by all the evidence required to process the change. One LA told us that in the past, assessment officers would write to customers to ask them to send or bring in the evidence. However, they now contact customers by telephone wherever possible, allowing the customer to explain any reasons they have for not providing evidence. If they are unsure about what evidence is required, the assessment officer can advise them about what is acceptable. Telephoning the customer is quicker than writing, and may be a more effective means of communication, particularly for those who have poor literacy or visual impairment. Like many other LAs, this is complemented by a welfare visiting service.

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Text messages

You can use text messages to remind people of appointments. However, be aware of the data protection issues relating to the use of text messages. Do not use them to transmit personal information, and do not use them without the recipient's express permission. Use the initial customer contact to determine which contact methods the customer prefers.

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Information packs

Routinely sending a change of circumstances reminder pack to new customers after a few weeks will reinforce messages for those you have already had contact with, and reach those with whom you have had limited contact.

A 13-week reminder

Dealing with new customers face-to-face gives you an excellent opportunity to tell them about reporting changes of circumstances. However, some customers may forget this as the message is lost in all of the new information they are faced with when claiming for the first time. When people claim HB through Jobcentre Plus or The Pension Service you have to think about other opportunities for communication.

Many LAs tell new customers about their responsibilities to report changes at the start of the process. One LA told us that they do this, but do not rely on it. Every new customer receives a Changes of Circumstances pack thirteen weeks after their first decision notice. This includes:

- a letter reminding them of their responsibilities, and of the potential consequences of failing to report changes
- a bar-coded change of circumstances form. The bar coding allows the form to be indexed more quickly if it is returned, as the LA's DIP system recognises the type of document, and the sender's details. It will also facilitate evaluation of this initiative
- a pre-paid envelope to make it easier for customers to return the form.

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Targeted mailshots

Many LAs use a rolling schedule of mailshots or partial interventions posted to different target groups at different points in the year.

Select groups based on local circumstances such as known dates of pay increases for large employers, and national events, such as increases in tax credits.

The importance of timing

To ensure maximum impact and reduce expenditure many LAs send out leaflets with annual uprating bills and entitlement letters, and then with any subsequent letters at certain periods in the year, for example, in June to reach seasonal workers over the summer, and in November to pick up Christmas changes.

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Forms

Forms are normally used to collect information, but they can incorporate useful information for customers.

Pre-paid envelopes may encourage customers to return forms.

Do you tell customers where to get forms?

Think about introducing e-forms that can be filled in on-line (see websites below).

Supplying forms to making it easy to notify changes

Leeds City Council encloses an A4 form with its annual uprating decisions, which customers can use to notify changes. The form contains a wide range of information to make it easier for customers to report changes. The form is reviewed on a regular basis to make sure that it remains up-to-date. It is available at this [link](#).

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Presentations or benefits forums

Presentations or benefits forums may be appropriate for some target audiences such as community groups or residents in sheltered housing complexes. They are a useful way of keeping local landlords informed about developments in Housing Benefit.

Presentations often focus on take-up, but are also an opportunity to tell groups of customers about their duty to report changes. You could follow these with benefit surgeries where individuals can discuss their Housing Benefit claims with you in private.

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Websites

Websites are a quick and easy way of communicating with a wide range of customers and partners. However you will need to consider how many of the intended audience have access to the internet.

Most LAs have downloadable claim forms but fewer have downloadable change of circumstances forms.

Think about introducing e-forms that can be filled in on-line.

DWP funded several electronic claim form projects through the Performance Standards Fund. These are listed in Annex A of bulletin G6/2007.

Tips and hints for websites

- ensure the website's search engine directs customers to the most appropriate pages
- use short and simple headings on web-pages that describe exactly what they are about
- spread information over separate pages (with links) to help customers find what they are looking for
- provide a downloadable form
- provide a downloadable leaflet explaining the changes to report
- downloadable forms and leaflets do not have to be in the same format as printed material. Avoid shaded backgrounds – these take longer to print out.

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Posters and leaflets

Posters are a good way of reinforcing other methods. Posters are best used to deliver a single core message, supported by information on how to find out more. Poster sites need to be in places where your target audience actually go or pass regularly.

Leaflets can be used to deliver detailed messages and the contents can be tailored to specific audiences, for example the visually impaired or people whose first language is not English. They can be posted out as part of a targeted mailshot or placed in locations your target audiences use.

Consider locations such as:

- community and cultural centres;
- sheltered housing;
- GP surgeries;
- leisure centres;
- pre-school nurseries.

Make sure that posters and leaflets are up-to-date and consistent, and that you have enough to replace those that get damaged. Change the look regularly so they have more impact.

Check also that they are correctly positioned, clearly visible and not obscured by lots of other material with different messages.

Making people look twice

One LA told us that it regularly changes the image on the front of its standard leaflet for customers on the importance of reporting changes of circumstances so that it looks different and new.

Presenting Information for the Visually Impaired

The RNIB website is a useful source of information on designing printed information that is accessible to customers with sight problems. RNIB's clear print guidelines cover basic design aspects such as font, type size and contrast. The RNIB website also includes more general information on formats and communication methods. <http://www.rnib.org.uk>

The National Leaflets Project

Clearly, communicating effectively with customers whose first language is not English presents additional challenges. The National Leaflets Project website provides access to a number of leaflets containing advice and guidance about different aspects of Housing Benefit and Council Tax Benefit in a number of languages in addition to English, including: Arabic, Bengali, Chinese, Gujarati, Polish, Punjabi, Somali, Urdu, Vietnamese and Welsh.

<http://www.benefit-leaflets.org/home.asp>

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Radio advertisements

Radio advertisements can reach a lot of people, but may be costly and must be carefully targeted by selecting the station, show and timing that is most likely to reach the target audience. Radio advertisements are best used to deliver a single core message, supported by information on how to find out more.

Working with neighbouring LAs will reduce costs and ensure that you are putting out consistent messages. Note also that it will be difficult to restrict the message to an LA area and so there is a risk of getting calls for other LAs. Working with neighbouring LAs helps manage this risk.

East Lindsey District Council joined forces with neighbouring North East Lincolnshire Council to fund an advertising campaign on Lincs FM their local radio station. The script, written by their creative department, is reproduced below:

Receiving benefits can be a big help when you are struggling to make ends meet, but when things do get better you may no longer need them. If you're in receipt of Housing or Council Tax Benefits and your circumstances change you could end up receiving too much money. If this happens the council will take back the overpayment. If your local council is North East Lincolnshire or East Lindsey District Council pop in or call their benefits office and make them aware of your change in circumstances. Trust us, it's for your benefit.

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Other media

Other ways of communicating key pieces of information include the business card described below.

Business Card

One LA we spoke to gives every new customer a card printed with their benefit account number, and containing contact details for the council – telephone, textphone and fax numbers, address, and email. As it is credit-card sized, the customer can keep it in their purse or wallet so it is easy to find. The reverse side includes the following text:

- *Please help us to help you get the most you can, quickly, and avoid debts.*
- *Always quote our reference number.*
- *[reference number].*
- *Don't delay – do it straight away.*
- *Don't wait to claim.*
- *Tell us changes as soon as they happen.*
- *Use original documents to prove your details and get them to us fast.*
- *Don't delay replying if we contact you.*

The LA has a process to mark each claim where the customer has been issued with a card. When staff have contact with customers they can issue a card if this has not yet been done.

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Methods in combinations

Many of these methods work well in combination with each other, with one method backing up the effects of another.

Use of Reminders

One LA told us that it believes one of the reasons for its excellent performance in identifying changes of circumstances is the use it makes of face-to-face contact with new customers, backed up by reminders. Staff tell customers making a claim in person about their responsibility to report changes. This initial message is reinforced by a small flyer in every subsequent postal communication, including the decision notice.

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Briefings and training sessions

These are good at delivering a consistent message to many people quickly and allow feedback and interaction. They can be used to deliver news about current topics and recent changes but are resource intensive, and may not always be the most appropriate method of communicating.

Make sure briefing material and handouts are available when the briefings take place, or follow up with electronic material to save on printed paper.

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Websites and e-learning

Providing Benefit staff with on-line guidance on your LA's intranet is an effective way of ensuring consistency, and can be updated more easily than paper guidance manuals.

Compile a group list of staff and partners' e-mail contact details so that you can tell them quickly and easily when you have a new procedure or message that you need them to know about.

E-learning is useful for both staff and for partner organisations as it allows people to learn at their own pace.

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Reminders

Reminders are useful for people who do not deal with customers on a daily basis. They include key message scripts, checklists, posters and leaflets.

Key message scripts summarise the key messages that should be communicated to customers. Posters, leaflets, web-sites, mugs, coasters and mouse mats can provide aide memoires for partners and staff.

Training and supporting materials for partners

One LA we spoke to provides training for several partners who hand out claim forms and change of circumstances report forms to customers. To back up training, they distributed mouse mats summarising the key points. These are a useful, immediately accessible reminder for the LA's partners.

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