

WELFARE AWARE

UNDERSTANDING AND PREPARING FOR CHANGE

HEALTH CHECK FOR DAY CENTRES, OUTREACH, FLOATING SUPPORT

GENERAL / CROSS CUTTING ISSUES

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
There is a record of clients engaging in advice or support services that shows which benefits each client receives. It is reviewed and updated regularly.			
Personalised financial inclusion support and signposting is available to each client.			
Information about welfare changes is available in different formats e.g. group work, leaflets and posters, in translation.			
Clients are supported and prepared to manage changes to welfare benefits when living independently.			
There are service user champions trained in welfare benefits.			
There is access to support (in-house or through another provider) with functional skills (maths and English), IT and ESOL.			
Clients understand the need for particular financial products and are supported to open bank accounts, credit unions accounts or post office accounts that fully meet their needs.			
Clients experiencing homelessness have a 'care of' address where they are able to receive and collect post regularly.			

From a Frontline Staff and Volunteers Perspective

Action	Yes	Partly	No/NA
Staff/volunteers have skills, information and resources to support service users with benefit changes.			
Staff/volunteers have skills, information and resources to support service users with financial inclusion.			
Staff/volunteers have the skills and knowledge necessary to refer/signpost clients to services offering financial inclusion support.			
Staff/volunteers are aware of what effect welfare changes will have on housing options for individual clients, e.g. due to housing benefit, local housing allowance, council tax benefit and local welfare assistance.			
Staff/volunteers know when a discretionary housing payment might be appropriate and how to support the client to apply.			

From a Strategic Management Perspective

Action	Yes	Partly	No/NA
The risk of each change and cumulative impacts on the organisation and service users has been assessed.			
The organisation has assessed skills/capacity to deliver support to service users around welfare changes, identified where there are deficits and where partnerships/multi-agency working is needed.			
The organisation has explored opportunities for joint working and pooled resources with other organisations e.g. shared training or activities.			
Required data collection for each service user includes information on client's support needs across budgeting, debt, rent arrears, literacy, numeracy.			
Adequate resources have been assessed and allocated to ensure staff have skills and knowledge across the current welfare system and Universal Credit.			
Policies and procedures on staff supervision and case management have been reviewed so that financial inclusion and benefits support is included.			
There is a plan (covering short, medium and long term) to keep clients and staff informed about welfare changes			

Management has a named contact at the Local Authority who is involved in the design and implementation of local implementation of welfare changes (e.g. commissioner, councillor, revenue and benefit officer/manager).			
The organisation has a welfare reform lead or working group including all grades, management to frontline, to coordinate the organisation's response and ensure it is maintained across all the changes in the next two years plus.			
Organisation has a named contact at JobCentre Plus offices in every area they operate.			
Organisation can provide clients with a 'care of' address and regular access to mail or has agreed provision with other local services.			

DISABILITY LIVING ALLOWANCE AND PERSONAL INDEPENDENCE PAYMENT

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients are aware of the end of DLA and the implementation of PIP.			
Clients who receive DLA now are aware that they will have to make a new application for PIP.			
Clients understand the PIP application and assessment process.			

From a Frontline Staff and Volunteer Perspective

Action	Yes	Partly	No/NA
Staff and volunteers understand the change to DLA and the implementation of PIP.			
Staff and volunteers are confident in supporting clients to understand notifications about the end of their DLA claim and the need to apply for PIP.			
Staff and volunteers are confident in supporting clients through the PIP application and assessment processes.			

LOCAL HOUSING ALLOWANCE - Shared Accommodation Rate

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients understand the SAR and if it applies to them.			
Clients know about the exemptions to SAR for those aged 25-34 years, whether they are eligible for an exemption and how to apply if they are.			
Clients eligible for the hostels exemption can prove that they have been living in homelessness hostels for 3 months or more, or know how to obtain proof.			
Clients who are eligible for the MAPPA exemption know to work with their lead professional to prove their exemption entitlement.			

From a Frontline Staff and Volunteers Perspective

Action	Yes	Partly	No/NA
Staff and volunteers are aware of and understand the age extension to SAR and exemptions for 25-34 year olds.			
Staff and volunteers know who to contact at local housing providers to obtain proof of past hostel residence.			
Staff and volunteers are aware of local process for applying for an exemption the age extension of the shared accommodation rate.			

From a Strategic Management Perspective

Action	Yes	Partly	No/NA
The organisation has developed links with local housing providers and knows their processes for providing previous service users with proof to support an application for a SAR exemption based on hostel stay.			

LOCAL WELFARE ASSISTANCE (PREVIOUSLY SOCIAL FUND)

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients are aware of the changes to the social fund, how to access local welfare assistance and what is available in their area.			
Clients are aware of other options to help with crisis and move on needs.			

From a Frontline Staff and Volunteer Perspective

Action	Yes	Partly	No/NA
Staff/ volunteers are aware of the local welfare assistance scheme's referral process, eligibility criteria and type of support offered.			
Staff/volunteers are aware of other funding options that could be used for move on costs.			

From a Strategic Management Perspective

Action	Yes	Partly	No/NA
The organisation is monitoring the impact of the transition to local welfare assistance e.g. on resettlement, and looking for alternative sources of support.			
The organisation is in contact with the local authority to give feedback on the local scheme, including looking for a role for the voluntary and community sector in delivery.			

COUNCIL TAX BENEFIT

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients are aware that they may be liable to pay council tax, even while on benefits/low income, and know how to manage their council tax payments.			

From a Frontline Staff and Volunteers Perspective

Action	Yes	Partly	No/NA
Staff/volunteers are aware of local changes to Council Tax Benefit and how this will affect clients living independently/moving on.			
Staff/volunteers know the level of contribution required for people in receipt of council tax support.			
Staff/volunteers support service users to understand and manage their council tax bill.			

From a Strategic Management Perspective

Action	Yes	Partly	No/NA
The organisation monitors the impact of changes to council tax support and ensures appropriate support is available, sharing this information with the local authority as needed to mitigate any problems.			

BENEFIT CAP

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients are aware of the maximum amount of combined benefits they can receive and how the reduction will be applied if they exceed the cap.			
Clients who may be affected by the cap are aware of the implementation date in their area.			
Clients are planning how to manage any rent shortfalls and are aware of support options such as DHPs.			

From a Frontline Staff and Volunteers Perspective

Action	Yes	Partly	No/NA
Staff/volunteers understand the benefit cap, how it is applied under the current system and Universal Credit, and which types of benefits mean a claimant is not subject to the cap			
Staff/volunteers can identify which clients will be affected by the benefit cap and when it will be implemented in their area(s).			
Staff/volunteers support clients affected by the cap to apply for discretionary housing payments or negotiate with landlords.			

UNIVERSAL CREDIT

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients know how to set up standing orders for rent, personal service charges, utilities etc.			
Clients have access to the internet and a computer or know where to access computer facilities in the local area.			
Clients are supported around IT skills and digital inclusion where applicable.			
Clients are aware of the information/issues they will need to provide/disclose when applying for Universal Credit in order to be considered for a payment exception.			

Clients understand conditionality, the Claimant Commitment and sanctions processes.			
Clients on full work-related requirements understand the Work Programme and related requirements.			
Clients are equipped with the skills to budget and manage a single monthly payment of benefits.			

From a Frontline Staff Perspective

Action	Yes	Partly	No/NA
Staff/volunteers can access computers and the internet with clients (e.g. keywork rooms) or can refer.			
Staff/volunteers are computer literate and have the skills necessary to support clients with computer and internet use.			
Staff/volunteers understand support and exceptions process in UC can support clients with regard to the information they will need to provide when applying for Universal Credit in order to be considered for a payment exception.			
Staff/volunteers know what financial services (banks, credit unions etc) are available in their area and service managers have developed a relationship with their managers to improve access to banking facilities for service users.			

From a Strategic Management Perspective

Action	Yes	Partly	No/NA
Partnerships with local agencies have been developed to include financial support services and direct referral routes for Day Centre service users			
Organisation has assessed what support and resources will be required to manage transition of revenue processes to UC model (e.g. provision of computer facilities).			

HOUSING BENEFIT SIZE CRITERIA ('BEDROOM TAX' / 'SPARE ROOM SUBSIDY')

From a Client/Service User Perspective

Action	Yes	Partly	No/NA
Clients have received information about Housing Benefit reductions associated with spare rooms in their property.			
Clients have a plan to manage any rent shortfalls e.g. moving home, budgeting, additional working hours, finding employment, discretionary housing payments, taking lodgers.			
Clients have access to information about taking lodgers, finding new accommodation and housing swap schemes			

From a Frontline Staff Perspective

Action	Yes	Partly	No/NA
Staff/volunteers are aware of reductions in Housing Benefit due to size criteria.			
Staff/volunteers support clients affected by the size criteria to: apply for discretionary housing payments; find work or extend working hours; take a lodger; find a smaller home.			

From a Strategic Management Perspective

Action	Yes	Partly	No/NA
The organisation ensures appropriate support is available for clients asking for support with Housing Benefit size criteria reductions e.g. training/information.			
The organisation has approached the local authority and understands the allocation of direct housing payments.			