

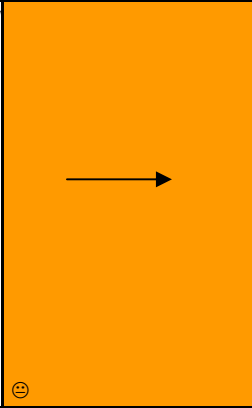





Income Maximisation Strategy Monitoring Sheet 2006/2009 (progress up to 22nd November 2006)



Aim 1 – Maximise take up of welfare benefits and tax credits across the City

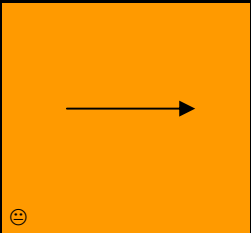
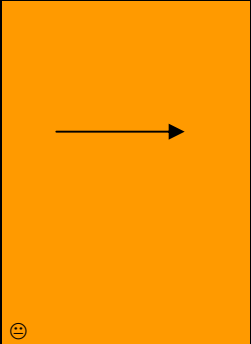
| Actions | Timescales | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|--|----------------------------------|--|---|--|---|
| 1.1a - Explore opportunities to commission and establish welfare benefits and tax credit advice services, encouraging partnership work where appropriate. | April 2006 and quarterly review. | As 19th July 2006 update. | As 19th July 2006 update. |  TASK COMPLETED | Quarterly monitoring meetings are being held with all service providers. Total of £1m exceeded for 2006/07 in the third quarter |
| 1.1b - Target, co-ordinate and deliver regular welfare benefit and tax credit take up campaigns, in partnership with voluntary and community sector organisations. | July 2006 and quarterly review. | Campaign now arranged for second week in February. Routeways to lead working in partnership with other advice organisations in the city. Details of campaign to be included in the local press, as well as the Senior Citizens Forum newsletter and a Stoke GP's mailshot. | Stoke campaign completed. 65 people seen, with 17 offered new take up of benefits. Partners included DEEAC, Routeways and Pensions Service. DH has been approached by a sheltered housing association that has 17 units city-wide to offer take up services to its older residents. Work in progress with HMRC and CAB to establish completion of claim forms by telephone and a potential warm phone based in the CAB. |  TASK COMPLETED | Total of £4m exceeded for 2006/07 in the third quarter |

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| <p>1.1c - Explore opportunities to support the development of PCC Customer Services to improve further welfare benefit and tax credit take up advice.</p> | <p>April 2007.</p> | <p>Customer services now have a regular attendee at the steering group. Future service level still to be established due to a reduction in staff.</p> | <p>Rebranding of care direct now taking place following withdrawal of DWP funding. New service with 668000 number to be advertised via Plymouth People, plasma screen at PCC, coasters and torch key-rings etc. Also, PCC web-site to reflect new service. The telephone benefit health check will continue, even though staffing has reduced</p> |  | <p>PCC Customer services take up figures for April to December 2006 exceeds £1.2m</p> |
| <p>1.1d – Explore opportunities for Plymouth City Council to promote welfare benefits and tax credit take up via its statutory duty to administer Housing Benefit, Council Tax and the Fairer Charging policy.</p> | <p>April 2007.</p> | <p>Advice services are to be included in the council tax bills for 2007/08</p> | <p>As per 24th January 2007 update.</p> |  | <p>Regular representation at PWRF from the Joint visiting team and PCC Revs and Bens. Advice service details to be included in the 2007/08 Council Tax Bill booklet</p> |
| <p>1.1e - Support partners (e.g. Community Legal Service accredited organisations) to make funding bids in order to support and develop provision of welfare benefits and tax credits advice.</p> | <p>April 2006 and yearly review.</p> | <p>As 24th January 2007 update.</p> | <p>Lottery basis bid for PWRF development was unsuccessful.</p> |  | <p>Support now provided for 4 bids city wide.</p> |

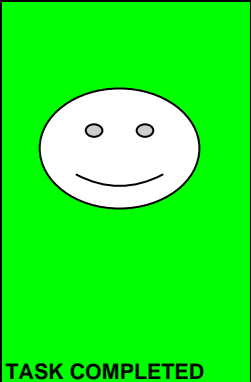
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| 1.2a – Work in partnership to explore and establish best practice in terms of engagement and service delivery for vulnerable groups. | April 2007 and quarterly review. | BME women event well attended and advice opportunities taken up by delegates .Older persons take up campaign to commence in February 2007. | Stoke campaign completed. 65 people seen, with 17 offered new take up of benefits. Partners included DEEAC, Routeways and Pensions Service. DH has been approached by a sheltered housing association that has 17 units city-wide to offer take up services to its older residents. |  TASK COMPLETED | Support provided for disabled customers, older people and BME women via various projects. |
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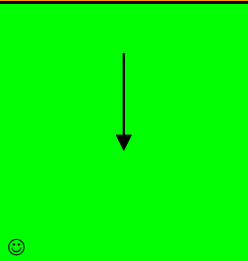


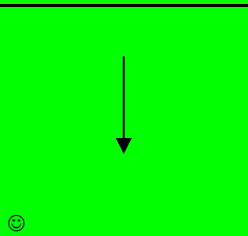
Aim.2 – Ensure minimisation of problem debt and increase financial awareness across the City

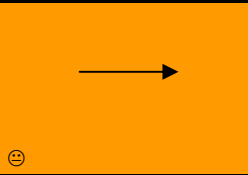

| Actions | Timescales | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|---|-------------------------------|------------------------------------|----------------------------------|--|--|
| 2.1a – Explore opportunities to commission and establish debt and money advice services, encouraging partnership work where appropriate. | April 2007. | As 19th July 2006 update. | As 19th July 2006 update. |  TASK COMPLETED | Quarterly monitoring meetings are being held with all service providers. CAB have seen 1284 people dealing with a total of over £27m personal debt from April to December 2006 |
| 2.1b - Support partners (e.g. Community Legal Service accredited organisations) to make funding bids in order to support and develop provision of debt and money advice services. | April 2006 and yearly review. | As 19th July 2006 update. | As 19th July 2006 update. |  TASK COMPLETED | PCC letters of support completed for both bids. |

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| 2.1c – Explore opportunities for Plymouth City Council to promote access to debt and money advice via its statutory duty to administer Housing Benefit, Council Tax and the Fairer Charging policy. | April 2007. | Details of the training plan forwarded to Claire Maguire (Joint Visiting Team). Also Pat Newton (PN) to establish training package for Housing staff in the Housing offices in partnership with CT | No reply from Claire Maguire. DH to continue to contact. |  | Training course offered to Joint Visiting team re recognising debt. |
| 2.2a - Work in partnership to explore and establish best practice in terms of engagement and service delivery for vulnerable groups. | April 2007 and quarterly review. | MAP awaiting details from Parkside school re establishing financial literacy workshops. HOPE Credit Union have established a successful savings club at Highfield School. Debt Conference planned for April 2007 with the theme "Debt- Who's responsible?" | No news from either Parkside or Coombe Dean. Debt Conference taking place on Fri 27th April. DH has been asked to attend a Becoming 18 Workshop on May 15th. This is designed for parents of disabled children to talk about IM issues for both the child and the parent. |  | Savings clubs now established at several Plymouth schools. Debt conference organised for 27th April 2007 |

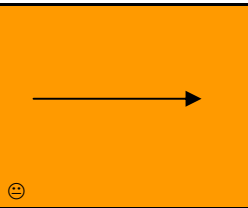
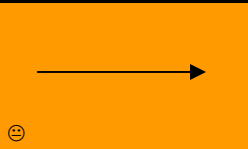
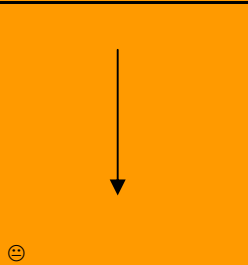
Aim.3 – Provide an effective network of income maximisation services within the city and neighbourhoods

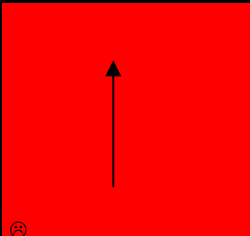
| Actions | Timescale | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|--|-------------|--|--|--|---|
| 3.1a - Explore the feasibility of establishing a one-stop multi-agency city centre advice service, to include regular outreach services throughout the City. | April 2007. | Further meeting held in January 2007. Referral and Welfare Benefits directory processes to be linked by PCC to the CAB via the online database, currently being developed Terms of reference agreed within the group, to be finalised by next meeting in April 2007. PCC meeting with LSC in February to discuss next stages | Meeting with PCC and LSC completed. Joint commissioning options discussed, with no commitments made. Further work to continue, with the voluntary sector fully consulted as part of the process. |  | CAB now operating a triage system via their new drop in service. Multi agency meetings held with CAB taking the lead. |

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| 3.1b - Explore provision of Income Maximisation services in the priority neighbourhood renewal neighbourhoods. | April 2007 and yearly review | As per 22nd November 2007 | No reply from DRCP regarding them sending a rep. |  | Services are being delivered from housing offices in North Prospect |
| 3.1c Make active link with Neighbourhood Renewal priorities and Floor Target Action Plans specifically in relation to income maximisation and tackling worklessness. | April 2006. | LAA meeting held in January 2007 at PCC, with Worklessness targets being a major area of the Economic block. | Financial Inclusion targets now established in the LAA Safer Stronger Communities block. |  | DH attends bi-monthly meetings of Worklessness theme group meetings. Financial Inclusion targets now established in the LAA Safer Stronger Communities block. |
| 3.1d - Investigate the provision of regular advice services from health settings, including Plymouth Hospitals and GP surgeries (reflecting 'Our Cities Health' priorities). | October 2006. | As per 22nd November 2007 | As per 22nd November 2007 |  | The DIAC project raised over £600k in previously unclaimed Welfare Benefits and Tax Credits in 2005/06. 15 people who attended the "Carols Mum says" event did so because of the letter from their GP |
| 3.1e - Explore and develop use of Plymouth City Council housing offices as venues for welfare benefit, tax credit, debt and money advice services for council tenants, delivered in partnership with the voluntary sector as appropriate. | July 2006. | Services now being delivered from Efford Housing office | Money Advice Plymouth are currently establishing whether housing offices could be used as collection points for credit unions. |  | Services are now being delivered from all housing offices in Plymouth |
| 3.1f - Work with Plymouth schools, extended schools and children's centres to explore potential to use premises to provide income maximisation advice services. | April 2007. | Steve Guy is still awaiting details from Parkside school re next steps. DH to meet Ian Smith (Extended Schools Co-ordinator) with a view to providing advice services in North of Plymouth | CT to contact Ian Smith to establish whether an IM service could be delivered from Estover school. |  | All of the Sure Starts and the Childrens Information Service (CIS) work closely with schools in their local area. |




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| 3.1g – Investigate the feasibility of providing a single point of contact for telephone advice and signposting to city-wide income maximisation services. | July 2007. | Referral and Welfare Benefits directory processes to be linked to the CAB via the online database, currently being developed | As per 24th January 2007 |  | CAB has kick started the process of establishing an online database of advisors. |
| 3.2a - Explore in partnership with voluntary and statutory organisations, the potential to secure external funding to support delivery of income maximisation services. | April 2006 and quarterly review. | DH still awaiting contact from GOSW re European Funding roadshow and from Big Lottery Fund re Reaching Communities. | As per 24th January 2007 |  | Bids now in for lottery funding. Await results in February 2007. |


Aim 4 – Provide information about financial inclusion and education

| Actions | Timescales | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|---|---------------------------------|--|--|---|---|
| 4.1a - Ensure details of financial inclusion and education services are included in appropriate websites. | October 2006 and annual review. | Website receiving 150 hits per month. Partner agency vacancies now available on PCC website. | As per 24th January 2007 |  | Website now live. |
| 4.1b - Advertise financial inclusion and education services provided by Credit Unions. | July 2006 and 6 monthly review. | Feasibility study commissioned by PCC and completed. Credit Union targets now established within LAA targets | Website advert now received from credit unions |  | Formation of the Plymouth Community Banking Partnership. Feasibility study now completed. |
| 4.2a - Explore with Children's Services the possibility of producing a financial awareness package for students and pupils. | Jan-07 | DH to produce an online awareness package for students and pupils | As per 24th January 2007 |  | First draft now completed |



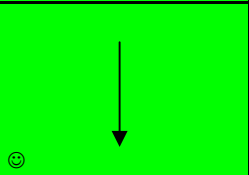
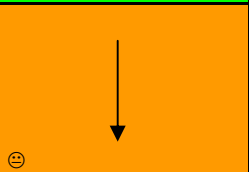
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| 4.3a - Investigate feasibility of a financial training package for staff dealing with members of the public. | Oct-06 | Details of the training plan forwarded to Claire Maguire (Joint Visiting Team). Also Pat Newton (PN) to establish training package for Housing staff in the Housing offices in partnership with CT | As per 24th January 2007 |  | Training course offered to Joint Visiting team re recognising debt. |
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Aim 5 – Raise awareness of energy efficiency, including fuel poverty

| Actions | Timescales | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|---|-------------|---|---|--|--|
| 5.1a - Ensure links with Plymouth Affordable Warmth Strategy priorities. | April 2006. | As per 22nd November. Task completed | As per 22nd November. Task completed |  | DH to continue to attend Affordable Warmth Strategy Group meetings and put forward IM issues as appropriate. |
| 5.1b - Use appropriate communication channels to 'myth-bust' issues regarding fuel poverty. | July 2006. | Details now on linked PCC website pages | As 24th January 2007 update. Task completed |  | Articles in Whats Up and the Herald. Inclusion on PCC website. Fortnightly advice services in the CAB |
| 5.1c – Explore opportunities to deliver fuel poverty awareness sessions to multi-agency staff and advisors. | July 2006. | As 19th July update. Task completed | CT is running a free course re Energy Debt on Weds 23rd May 2007. |  | Adverts on PCC Notice Board and sent to PWRP |


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| 5.2a - Explore feasibility of providing fuel poverty advice in the context of general income maximisation advice services. | October 2006. | As 19th July update. Task completed | As 19th July update. Task completed |  | EDF ambassadors working in the CAB |
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Aim 6 Contribute to the co-ordination and promotion of Income Maximisation services and information

| Actions | Timescales | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|---|--------------------------------------|---|---|---|---|
| 6.1a - Explore provision of practical support to the Welfare Rights Forum, and Devon Money Advice Forum. | April 2006 and six monthly review. | As 19th July update. Task completed | As 19th July update. Task completed |  | Venue supplied for both forums. Regular updates made to both forums regarding IM strategic issues. PWRF asked to elect members to the IM steering group |
| 6.2a - Produce standard multi-agency literature on income maximisation issues; promote use amongst partners, and in public services settings across the city. | October 2006 and six monthly review. | As 22nd November update. Task completed | As 22nd November update. Task completed |  | Briefing notes issued via PCC website and PWRF |
| 6.2b - Lead and develop a communication initiative with the aim of producing a comprehensive on-line signposting service for advisors and service-users. | October 2006. | Referral and Welfare Benefits directory processes to be linked by PCC to the CAB via the online database, currently being developed | As per 24th January 2007 |  | CAB now leading on a communication initiative regarding a common referral process |
| 6.2c - Explore the use of appropriate websites to include (i) a directory of debt and money advice giving agencies, and (ii) a directory of welfare benefit and tax credit advice agencies. | October 2006 and yearly review. | Referral and Welfare Benefits directory processes to be linked by PCC to the CAB via the online database, currently being developed | As per 24th January 2007 |  | Debt directory available as hard copy and on line |

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|--|---------------|--|--------------------------------------|--|---|
| 6.2d - Produce a regular series of income maximisation fact sheets for circulation (and linked to appropriate websites) to advisors and service-users. | October 2006. | As per 22nd November. Task completed | As per 22nd November. Task completed |  TASK COMPLETED | Advice notes already produced re benefits for young people, Community Engagement and DWP's Personal Information Policy |
| 6.2e - Hold a city-wide welfare rights conference. | April 2006. | As per 22nd November. Task completed | As per 22nd November. Task completed |  TASK COMPLETED | Conference completed |
| 6.2f - Work to ensure advice is offered in all appropriate formats including languages other than English, Braille and large print. | Jan-07 | As 19th July update. Task completed | As 19th July update. Task completed |  TASK COMPLETED | Website details now available in multi language formats. Translation and interpretation services available via Translate Plymouth |
| 6.2g - Explore opportunities to provide on-line training and information sharing (e.g. use of consultation chat rooms) | Apr-07 | Referral database still to be established. This could be adapted to provide a forum for consultation and training. | As per 24th January 2007 |   | CAB now leading on a communication initiative regarding a common referral process. This could be used as a base for sharing information and good practice |

Aim 7 Monitor, evaluate and review the Income Maximisation Strategy

| Actions | Timescales | Progress (up to 24th January 2007) | Progress (up to 15th March 2007) | Direction of travel | Evidence |
|---|---------------------------------|-------------------------------------|-----------------------------------|--|---|
| 7.1a - Set up and facilitate quarterly meetings to monitor and evaluate actions identified in the Income Maximisation Strategy. | July 2006 and quarterly review. | Meeting completed 24th January 2007 | Meeting completed 15th March 2007 |  TASK COMPLETED | Bi-monthly meetings scheduled for the next 12 months. |

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| 7.1b - Ensure findings influence future revisions of the Income Maximisation Strategy and action plan. | April 2007 and annually. | As 19th July update. Task completed | As 19th July update. Task completed |  TASK COMPLETED | Progress matrix now completed |
| 7.1c – Produce regular updates on city-wide take-up of Benefits and Tax Credits. | April 2006 and quarterly. | Quarterly figures now completed and forwarded as agreed. Liquid Money details forwarded to CAB to see if it can be used to help develop the database. Plymouth Welfare Rights Forum contacted and asked to contact DH if they wish their take up figures to be included in future city wide returns | As 24th January 2007 update. Task completed |  TASK COMPLETED | Quarterly benefit take up figures produced. |

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| Action point |
| Task completed |
| DH to keep group informed of outcome of sheltered housing association contact (May 07) JG to keep group informed of ongoing work with HMRC (May 07) |

PCC customer service rep **Lynn Jane (LJ) or Caroline Sweet (CS)** to feedback to next meeting re future service delivery **(May 2007)**

DH to keep group informed of progress re inclusion in council tax billing **(May 2007)**

DH to inform group of progress of lottery bids **(May 2007)**

Task completed

Action point

Task completed

DH to inform group of progress of lottery bids (May 2007)

DH to report back to the group, outcome of discussion with Claire Maguire **(May 2007)** **PN** to report to group details of proposed training for Housing Staff **(May 2007)**

JG/CAB to inform group of work with Stepping Out and START **(May 2007)** **DH** to establish whether other partners could be involved in the Becoming 18 workshops. **(May 2007)**

Action point

Jane Guy (JG) to keep group informed of outcome of future meetings **(May 2007)**

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| <p>DH to discuss with the Neighbourhood Renewal health theme lead re IM inclusion (May 07)</p> |
| <p>DH to continue to liaise with economic theme lead and report back to the group with how the IMS can best fit in with LAA requirements. (May 2007)</p> |
| <p>CC to contact DRCP re progress of Devonport pilot and report back to group (May 2007)</p> |
| <p>CT to inform group of next steps (May 2007)</p> |
| <p>CT to inform group of contact with Ian Smith (May 2007)</p> |

JG to keep group informed re database **(May 2007)**

DH to feedback to steering group re European Funding and Reaching Communities fund and outcomes of current lottery bid applications **(May 2007)**

Action point

DH to contact **Jane Guy (JG)** re inclusion of appropriate shared pages on respective website **(May 2007)**

DH to ensure that credit unions advert is included on PCC website. **(May 2007)**

DH to distribute draft of awareness package **(May 2007)**

DH to report back to the group, outcome of discussion with Claire Maguire **(May 2007)** **PN** to report to group details of proposed training for Housing Staff **(May 2007)**

Action point

Task completed

Task completed

DH to ensure details of course are included on PCC notice board. **(May 2007)**

Task completed

Action point

Task completed

Task completed

JG to report to group findings from advice for all meetings (**May 2007**)

JG to keep group informed re database (**May 2007**)

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| Task completed |
| Task completed |
| Task completed |
| JG to report to group findings from advice for all meetings (May 2007) |

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| Action point |
| Task completed |

Extraordinary meeting of IMS Steering Group to be convened in April to discuss revision of action plan. **(All members April 2007)**

Task completed