

# the Journal

and the Digest of Decisions

Issue 30 Spring 2005

ISSUE 1: SUMMER 1994

Judicial Review  
Profile  
News

**THE  
irs  
JOURNAL**

New Procedures  
Diary  
Staff Counsellors

GUIDE TO THE INDEPENDENT REVIEW SERVICE

ISSUE 14

**irs**  
Independent Review Service  
for the Social Fund

*the  
journal  
and  
digest of decisions*

- IRS Performance
- Access to Social Fund
- New Social Fund

Guide to the Independent Review Service

**Independent  
Review Service**

May 2000 Issue 18

**The Journal  
and  
Digest of Decisions**

Inside:  
Customer Service: The Independent Review Service's Approach




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Winter 2001 Issue 20

Inside: The role of the inspector

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Setting  
up home -  
Direction 4(a)(v)

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for the Social Fund

# The Journal Turns 30!

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## Editor's Letter

### Welcome to the 30th edition of the IRS Journal and Digest.

The first edition of the IRS Journal was published in 1994. The journal was introduced to raise awareness of the role of the IRS and the right to an independent review. The first edition featured articles about some of the Inspectors and information about the review process. At that stage 107 Inspectors worked at the IRS and we dealt with just over 26,000 cases a year. 79% of cases were cleared in 30 working days. The article from Ann Greenshields on pages 2 – 5 shows how we have changed in the past 10 years.

As the Journal developed it became clear that readers wanted more information on real cases. They wanted to see how the law was applied in practice and why the IRS changed the outcome of cases. To introduce more real case studies the Digest was launched in 1996 in edition 5. 23 case studies were included that covered a broad range of topics, including Direction 7, evidence and exclusions. The Digest has remained a constant inclusion in every journal since and is still the section of the Journal that is most popular with our readers.

Edition 30 focuses on issues that are topical in 2005. We have focused on things that have changed substantially since the first edition in 1994. You will therefore find articles on how the IRS review process has changed, the training we provide for decision makers and representatives and research that is currently being conducted on the Social Fund.

I hope you find this edition interesting and helpful. If you have any ideas for future editions you can contact me at the usual IRS address, by telephone on **0121 606 2111** or by e-mail at **np@irs-review.org.uk** I look forward to hearing from you.



Natalie Penrose

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## IRS Freephone

Journal 29 announced the introduction of a new freephone service at the IRS. The freephone number is 0800 096 1926

Since introducing freephone in October 2004 the numbers of customers choosing to provide their evidence by phone has increased by around 10%.

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## National Audit Office

The National Audit Office has published a report “Helping those in financial hardship – the running of the Social Fund”.

The report recommends a range of initiatives that would improve the standard of decision-making and ensure that the administration of front-line Social Fund was more efficient. Some of the recommendations are:

- **Improving awareness of the Social Fund.** Greater awareness is needed amongst front-line staff in Jobcentre Plus. The report suggests that the Social Fund should be raised automatically with new claimants of relevant benefits and that tailored information should be made available.
- **Improving standards of decision making.** Up-to-date, centrally coordinated training, based on IRS training materials, should be introduced. It is also suggested that the IRS takes a quality assurance role in respect to training.
- **Improving standards of decision making.** Social Fund customers should be able to approach the IRS directly after they have had a Jobcentre review.
- **Administering the Fund more efficiently.** It is suggested that a standard process is introduced across all districts.

For more information or to see a copy of the report contact the National Audit Office or go to their website at: [www.nao.org.uk](http://www.nao.org.uk)

## New Self-Instruction Packages

The IRS has a range of self-instruction packages that are available free of charge. Packs on community care grants, crisis loans, budgeting loans and evidence are now in stock. A pack giving a basic overview of Social Fund is also available.

Recently we have developed packs aimed specifically at people working in Jobcentre Plus. The following packs are now available:

- **The Social Fund for Jobcentre Plus Staff.** A pack aimed at people working in front-line Jobcentre Plus. This pack is aimed at giving this group of people a general awareness of the aims of Social Fund. The pack is focused on how to recognise customers who may have needs that could potentially be met by Social Fund and how to signpost these people in the right direction.
- **Decision Making and Reviews.** This pack is specifically for Social Fund Decision Makers and Reviewing Officers.

If you would like to order a pack please contact **Lis Martin** on **0121 606 2222** or e-mail her at [em.irs-review.org.uk](mailto:em.irs-review.org.uk) The packs are also available to download at: [www.irs-review.org.uk](http://www.irs-review.org.uk)

**If you live in Northern Ireland you should contact the Office of the Social Fund Commissioner. Please see the back cover for details.**

# The Inspector's Review

**ANN GREENSHIELDS EXPLAINS HOW THE IRS HAS DELIVERED A RANGE OF CHANGES TO IMPROVE ACCESS AND PARTICIPATION TO THE REVIEW, THE SPEED OF OUR SERVICE AND HOW WE SHARE BEST PRACTICE**

It is ten years since the IRS issued its first Journal. In that issue, the then Social Fund Commissioner, Rosalind Mackworth said:

*'We believe that procedures are improved by being open, that reasons should be given, that procedures should be easy to understand and easy to apply.'*

Those principles are still valid today. In his latest Annual Report, the current Social Fund Commissioner, Sir Richard Tilt said:

*"The principles that guide the Independent Review Service in its work focus on accurate, customer-centred decisions, delivered promptly at relatively low cost to the taxpayer. ... It is important that applicants and potential applicants are able to access the Social Fund when they need to, and that good quality advice and information is available to them about the scheme and their rights."*

Although the principles have remained fundamentally the same, they have been the vehicle for continuous development and improvement of our processes. Over the years we have carried out a considerable amount of customer research and drawn on customer feedback from various sources in order to shape the service we deliver today. That service is significantly different in many respects to that of ten years ago.

## **Participation in the Review Process**


Back in 1994, in the interests of openness, it was our practice to send the applicant a copy of all the papers the Inspector would consider in the course

of the review and to invite written comment on them. It became apparent from some of the responses we received that some customers found the volume and technical content of the papers difficult to understand. Only 61% of customers responded to the copy papers. We were concerned that these problems meant natural justice was not being served and that applicants were unable to participate effectively in the review process.

Extensive customer research, both qualitative and quantitative, bore out those initial concerns, revealing that few customers read all the papers and many did not understand them. The research identified which of the papers proved to be the most informative for customers. Taking account of these findings, we tested a revised process, which involved sending a smaller bundle of key papers to the customer. This resulted in greater numbers reading and understanding the papers and a higher response rate of 69%. But there was more to do, as the change did not directly address the problems arising from the technical content of the papers.


Further customer research and extensive testing resulted in the process we have today:

- the case is assigned to an Inspector from the outset, who examines all the evidence thoroughly to identify the relevant facts, the key issues to be decided and any necessary enquiries;
- the Inspector sends the applicant a copy of the important papers from the case, and sets



out clearly and simply the relevant facts, the issues to be decided, and asks for any further information needed to decide those issues;

- each letter and decision is tailored to the case and, in particular, respects the applicant's level of understanding; and
- the Inspector explains what will happen next and offers the applicant a choice of methods of replying to the papers. The applicant can reply by telephone, letter or fax.




We are encouraged that in between April - December 2004 84% of applicants responded to the papers and engaged with this process. Over 90% of those who responded to our customer survey, reported that the letter detailing the facts and issues was helpful and easy to follow. Responses by telephone increased from 20% at the start of the year to almost one-third in December 2004.

#### **Information and Accessibility**

In recent years we have increased our efforts to improve the standard and clarity of the information we produce for users and potential users of our services. We have a range of leaflets that explain, for example:

- the right to independent review and how to apply;
- the purpose of the different types of Social Fund payments and how each are decided;
- the review process;
- how to complain if dissatisfied with the Inspector's decision or our service.



The relevant leaflet is sent to customers at the appropriate stages of the review process. In an effort to ensure people are aware of their rights, we distribute leaflets and posters widely to adviser organisations and to other places potential users might visit.

All of our leaflets and letters, including Inspectors' decisions, are produced in large print following the "See It Right" guidelines produced by the Royal Institute for the blind. Last year we were successful in our application to the Plain Language Commission for the Clear English Standard for our customer leaflets.

We recognise that many of our customers face particular difficulties in communicating. To minimise such barriers, we recently introduced a number of additional services, which we publicise in our leaflets, including:

- a textphone service for customers with impaired hearing;
- audiotape versions of documents and translation into Braille for customers with impaired vision;
- translation of documents into 12 languages and a telephone interpreting service for customers who have difficulty understanding English;
- a free phone service for all customers, as all have limited resources and the large majority of whom would otherwise bear the cost of long distance calls.

### Completion Times

People who use the Social Fund do so at times of acute need, often arising in difficult circumstances. It is vital that the independent review is responsive and quick, particularly as applicants to the Fund

is received at the IRS to the day the Inspector's decision is issued, and include the time allowed for the applicant to respond to the papers. In keeping with our quest for continuous improvement, our time targets have become increasingly challenging, with cases being completed in fewer days, whilst increasing the proportion to be met within the times set. The table below compares the targets and achievements for 1993/1994 and 2003/2004.

### Feeding back on Standards

From its position at the end of the grievance process, the Independent Review Service has a unique overview and considerable data about the standard of decision making and administration in the Social Fund. It has always been our firm belief that the information we collect should be utilised, to help secure improvements at the initial decision making stages and to inform the development of Social Fund policy. Although there is no express statutory duty to do so, we have had in place for several years a formal structure, with the agreement of Jobcentre Plus and DWP, for feeding back to them on standards.

We provide a quarterly statistical report for each district office setting out our findings on a range of key areas of performance. We also produce a more

1993/1994		2003/2004	
Target	Achieved	Target	Achieved
Crisis Loans - 70% within 4 working days	<b>93%</b>	Urgent Cases, including all crisis loans for living expenses - 95% within 24 hours	<b>99%</b>
All other cases - 70% within 30 working days	<b>79%</b>	Cases requiring no, or only straightforward enquiries or investigation - 95% within 12 working days	<b>99%</b>
		Cases requiring complex enquiries or investigation - 90% within 23 working days	<b>94%</b>

will have had two decisions from Jobcentre Plus (an initial decision and a review decision) before coming to the IRS.

The organisation has always set itself demanding time targets for completing reviews and has met them consistently. These run from the day the case

detailed annual report for each region, covering all the districts in region, compared against regional and national data. The Commissioner uses these reports as the basis of an annual meeting in each region with Social Fund managers at which the issues arising are discussed with a view to findings ways of making improvements.

The Commissioner also has regular meetings with Ministers and senior officials at which operational and policy issues are discussed. The Commissioner formally asks the Department to consider a number of important issues arising through the medium of his annual report to the Secretary of State. And the Department provides a written response, which is published in the following year's annual report.

### Improving Administrative Justice Systems

The Independent Review Service is not a tribunal, but operates in the same field of providing



independent redress for the aggrieved citizen. From that perspective we have been interested in the ongoing work to reform tribunal services. In particular we were interested in the review of tribunals conducted by Sir Andrew Leggatt. The purpose of which was to examine the strengths and weaknesses of the system and, where relevant and appropriate, to make proposals for reform. The review was not intended to provide detailed proposals, but to provide a framework for the strategic development of the British system of administrative justice to address issues of accessibility, independence, fairness, proportionality and effective decision-making.

A great deal of work has flowed from Sir Andrew's report, culminating in a White Paper, *Transforming Public Services: Complaints Redress and Tribunals* in July 2004. This sets out the Government's proposals for some radical reforms for public services and improving access to justice – administrative justice and justice in the workplace. The proposals go beyond those of tribunal reform to encompass improvements in service delivery and decision making at the front end of the administrative justice system. Getting decisions

right at the outset reduces the need for dispute resolution. In terms of the new tribunal service, the paper proposes that its key characteristics must include:

- manifest independence from those whose decisions are being reviewed
- appropriate waiting times – cases dealt with at the right speed
- cases resolved without formal hearings where possible
- where hearings are necessary, hearing centres that are accessible with modern facilities and hearings that are not daunting or legalistic
- clarity and accessibility of information about the process
- independent and skilled judiciary
- authoritative, consistent and comprehensible decisions which command respect of those affected
- a cost efficient service that provides good value to the taxpayer
- a duty to feed back to the relevant decision making department to improve first line decision making and for that department to respond to the reports.

The desires for the new Tribunal Service resonate with many of the features of the Independent Review Service for the discretionary Social Fund. The Independent Review Service is a unique system, which came into being in 1988. It is based on a paper review rather than a formal hearing. Our processes are straightforward and decisions are delivered quickly at relatively low cost to the taxpayer. At the heart of the system is a commitment to quality of decision-making and services and to customer centred processes. Our experience of developing and administering such a system may be of interest to those responsible for taking forward the proposals in the White Paper.

Further information on the Inspector's review can be found on our website at:

[www.irs-review.org.uk](http://www.irs-review.org.uk)

# Raising Awareness, Sharing Best Practice and Training

**JIM DAVIES- SHUCK AND JANET SIMKINS**  
DESCRIBE THE WORK OF THE IRS BUSINESS TEAM

## In the beginning

The IRS has always had contact with local office Social Fund teams and with outside organisations who have an interest in the Social Fund and its review process. In the early days this was limited to promoting understanding of the review process and an informal interchange of views. This is the seed from which the Business Team grew.

In the early 90's the Commissioner or a member of his staff followed an ad-hoc programme of liaison meetings with the then Benefits Agency. We also introduced the IRS Journal containing articles on all aspects of the Social Fund. When John Scampion became Commissioner in 1995, he sought to broaden the scope of this work. By the end of his first 3-year term as Commissioner he had set up a Business Team with a complement of eight staff. Inspectors from this team began to deliver workshops to groups of decision makers and to groups of advisers/representatives.

By March 2000 we were presenting 60 workshops per year. The Team also arranged and delivered a programme of structured meetings with Social Fund managers to feedback on the performance of Benefits Agency offices across Great Britain. This programme of meetings was supported by quarterly and annual reports.

## Feedback to Jobcentre Plus and raising awareness of the review in 2004/5

The current Commissioner, Sir Richard Tilt, has further broadened and developed this area of work. The Commissioner meets with the Social Security Minister several times a year. He makes many visits to Welfare Rights organisations to increase their awareness of the Social Fund and the review process.

Sir Richard also follows a structured programme of regional meetings with Social Fund managers in Jobcentre Plus. He visits each of the 11 regions once a year to provide feedback on trends and performance in each area. More recently the

Commissioner has introduced a programme of Social Fund Masterclass session for Senior Managers working in Jobcentre Plus.

The Business Team also present workshops to Social Fund staff to share our expertise and discuss issues around decision making with the aim of improving the service for applicants to the Social Fund. We present awareness workshops to front line Jobcentre Plus and Pensions Service staff to assist them in giving correct advice to customers regarding the Social Fund and its review system. We provide many workshops for the Welfare Rights and Advice community to inform advisers about what is available in the way of grants and loans.

The team produce articles for publications that are read by customers and representatives who use or may use the Social Fund and its review process.

## What is the scope of this work?

The scope of this work has grown tremendously in the past 4 years.

- On average we present between 500 and 600 workshops each year. These are attended by approximately 4,500 people.
- In 2004/5 we will issue over 9,000 packs to public sector bodies and advice organisations. We also attend 4 – 6 conferences held by welfare rights organisations each year. We have a stand in the exhibition area and, where possible, we address the conference. Both of these initiatives are designed to raise awareness of the review.
- We attend 11 meetings, one in each of the regions, with Social Fund managers each year. Tailored annual and quarterly reports are prepared to support this programme of feedback.

- We have written and produced a series of Self Instruction Packs for anyone who wants to learn Social Fund law and practice. We supply them to welfare rights advisers and to staff in Jobcentre Plus and Pension Service. Each unit covers a particular topic and they all contain information and examples, with a question and answer section at the end to aid self-assessment.
- We have a wide range of leaflets and factsheets.
- We produce and publicise three editions of this Journal each year.

#### **How is this service delivered?**

Nine people currently work on this area of business. The team is made up of a mixture of workshop presenters, administrative staff, specialists and a Team Leader. The Team covers the whole of Great Britain and is responsible for meeting demanding targets and managing it's own budgets.

Here is an account of an average week in the life of the Business Team.

### **A week in the life...**

#### **Monday**

- Attendance at Citizens Advice Bureaux National Conference. The IRS has a stand for the three days of the conference that needs to be manned full-time
- An awareness workshop to the Pension Service in Bridgend
- An all day technical workshop to tenancy support workers in Sheffield
- The South East regional meeting with Social Fund managers

#### **Tuesday**

- Day two of the NACAB Conference in the morning
- Morning and afternoon awareness workshops to Jobcentre Plus staff in Grimsby
- An awareness workshop for Citizens Advice staff in Salford
- An awareness workshop to Pension Service staff in Pontypridd

#### **Wednesd**

- Day three of the NACAB conference
- An evening seminar at the NACAB conference on the Social Fund presented by the IRS
- Technical workshop to advisers in Falkirk
- Pension Service awareness workshop in Cwmbran.

#### **Thursday**

- Full day technical workshop to welfare rights advisers in Chester
- Pension Service awareness workshop in Cardiff
- Morning and afternoon awareness sessions for Jobcentre Plus front line staff in Wakefield.

#### **Friday**

- All day technical workshop to a housing association in Manchester
- All day workshop for support workers in Rochdale
- An awareness session for support workers in Birmingham
- An awareness session with the Pension Service in Merthyr Tydfil

#### **Contact details:**

If you want more information about the IRS external focus, would like to receive our publications or want to book a workshop please see our website at [www.irs-review.org.uk](http://www.irs-review.org.uk)

In 2004 the Centre for Research in Social Policy at Loughborough University, with support from the Independent Review Service, made a successful bid to the Joseph Rowntree Foundation for funding for a research project to examine the contribution the Social Fund makes to reducing poverty and social exclusion. The following describes the background leading up to the bid, the research objectives and how the research project will be conducted.

### The Changing Aims of the Social Fund

The Social Fund was established in 1988



comprising a regulated scheme and a discretionary scheme. Amongst other aims, the discretionary scheme was intended to:

- support the Government's economic objectives by containing expenditure within a cash-limited budget;
- concentrate attention and help on those applicants facing greatest difficulties in managing on their income;
- provide a more varied response to inescapable individual need than could be achieved under the previous single payment scheme; and
- break new ground in the field of community care.

Other than a major change to the budgeting loan scheme, the discretionary Social Fund has remained largely unchanged since its inception. However, the stated aims of the scheme have shifted somewhat over the years.

In his 2000/01 Annual Report on the Social Fund, the then Secretary of State, Alistair Darling, described the Social Fund as *"one part of the wider strategy that we have put in place to tackle poverty and social exclusion."* He went on to say *"we will continue to keep the Social Fund under review, to ensure that it supports our wider welfare reforms."*

### Current Government Objectives

In 1999 the Government set out its programme for tackling poverty and social exclusion and committed itself to year on year progress in meeting four key objectives. These are:

# Combating Pove

## Research into the effectiveness

### EDWINA LLOYD DISCUSSES CURRENT

- eradicating child poverty in 20 years and halving it in ten;
- helping all adults into work when they can and providing greater help when they cannot;
- making sure pensioners can live secure, active and fulfilling lives;
- building thriving communities where all can enjoy a decent quality of life.

### Recommendations from the Social Security Select Committee

In 2001 the Social Security Select Committee undertook an enquiry into the Social Fund and concluded that:

*"the present Social Fund system is working against the Government's key aim of reducing child poverty. ...in its present form, the Discretionary Social Fund is adding to the poverty and social exclusion of families with children..."*

The Select Committee considered that, without reform, *"there is a strong possibility that the wider*

*social policy objectives of the Government will be endangered.”*

### **Government response to the Select Committee Report**

The Government did not accept that the operation of the Social Fund worked against its wider social policies such as the eradication of child poverty. However, it stated that it would continue to keep under review, in the light of its overall priorities, what the best way is of supporting vulnerable people with the cost of intermittent expenses. Also, it would continue to keep the Social Fund under review to

Fund Commissioner believed that there was a pressing need for research into the scheme to determine the extent to which it was helping to reduce poverty and social exclusion. Also, as the Independent Review Service deals with cases from across the country, it is in a unique position and has a wealth of expertise and information to draw upon to contribute to the debate about the operation and development of the Social Fund. On an ongoing basis we provide advice and information about operational performance and Social Fund policy to the Secretary of State and policy officials.

# erty and Social Exclusion

## of the Social Fund in meeting the Government's objectives

RESEARCH INTO THE EFFECTIVENESS OF THE SOCIAL FUND

see whether further improvements could be made to its operation and to ensure that it plays its part in reducing poverty in general.

### **Starting the research and the involvement of the Independent Review Service**

It was against this backdrop of the changing aims of the Social Fund and the questionable impact it has on Government objectives, that in 2001 the Social Fund Commissioner, Sir Richard Tilt, suggested to the Department for Work and Pensions that it undertake research into the effectiveness of the Social Fund in relation to these objectives. The Department was unable to include this in its published research programme in 2002/03, but agreed that it would be helpful for the Independent Review Service to pursue this research with the Joseph Rowntree Foundation.

Although the Independent Review Service has carried out its own research before, this has primarily been to probe customers' views on the service we provide in order to continually improve and refine our service delivery. To embark on a research project within the social policy arena was something very new for us. However, the Social

### **Recruiting a researcher and seeking funding**

The Joseph Rowntree Foundation is one of the largest social policy research and development charities in the country. It works in partnership with various academic and other institutions to achieve its aims. A high priority for the Foundation is to ensure that findings from research are disseminated widely to inform and develop policies and practices.

The Social Fund Commissioner met the Director of the Joseph Rowntree Foundation early in 2003 to discuss the possibility of research into the Social Fund, and she suggested that the Independent Review Service recruit a researcher with whom to make a joint proposal.

The Independent Review Service recruited the Centre for Research in Social Policy at Loughborough University to conduct the research and the two organisations collaborated on the research proposal. In February 2004 the Joseph Rowntree Foundation confirmed that it would fund the research.

### **Objectives and methodology of the research**

The research project has the following objectives:

- to explore what contribution the discretionary Social Fund makes to reducing poverty and social exclusion;
- to assess whether proposals for changes to the discretionary Social Fund are likely to further Government objectives of combating poverty and social exclusion;
- to produce policy recommendations for reform of the Social Fund based on the experiences, reflections and deliberations of both eligible and non-eligible groups that will contribute to Government objectives of combating poverty and social exclusion.

The research involves:

- a short review of relevant literature review, including English language literature from other countries;
- a secondary analysis drawing mainly on the Family Resources Survey to establish the main socio-economic and demographic characteristics of users of the discretionary Social Fund; and
- focus groups involving people who may have experienced poverty and social exclusion. Participants will be selected from the same part of the country and include both rural and urban areas. They will include people who have received Social Fund awards in the previous 12 months, those who are eligible but whose applications were unsuccessful and those who were eligible but have not applied to the Fund. People included in the focus groups will be selected from a range of client groups, including households with children, single people and retired households.

The focus groups will be divided into two stages. In the first stage they will explore the impacts of the Social Fund and whether it has helped or hindered the participants as they seek to improve their circumstances. The first stage focus groups are now almost completed.

The second stage focus groups will discuss the pros and cons of various policy options, which would enable the Social Fund to make

a better contribution to Government objectives on poverty and social exclusion. The policy options will be drawn from existing research and literature, and those developed during the course of this research. The second stage focus groups will also include taxpayers on moderate to high incomes whose tax contributions would fund any reforms to the scheme.

The project team meets regularly to review progress and discuss future steps. The Independent Review Service Manager and Social Fund Commissioner's Aide attend the meetings primarily to advise on the basis of their experience and knowledge of the Social Fund.

### **Assisting the project team**

The Joseph Rowntree Foundation sets up Advisory Groups for projects it is supporting, when it believes the topic being studied is likely to be of interest to a wide range of people. Members of Advisory Groups are chosen to achieve a spread of knowledge and experience, which can contribute to the project. The Advisory Groups usually meet two to four times a year with the project team, depending on the needs of the particular project. The Social Fund Commissioner sits on the Project Advisory Group for the Social Fund research. Other members include representatives from Citizens Advice and the Department for Work and Pensions.

### **What happens next ?**

The Joseph Rowntree Foundation gives a high priority to the dissemination of the results of the projects it supports and ensures that the findings are of value to policy-makers, practitioners and service users. It requires a short, accessible report and a summary of findings. The research started in June 2004 and the final report is expected to be ready by June 2005. The project team will produce a two-page summary for the Independent Review Service and policy-makers. It also plans to hold a workshop following publication of the report to feed back findings to invited participants including the Independent Review Service, policy-makers and other relevant groups.

An update on the research will be published in a future journal.

# Helping Deliver Improvements in Front-line Service in Jobcentre Plus

**PAUL NESBITT** INTERVIEWS SOCIAL FUND MANAGER JOAN LEES AND HER COLLEAGUE LYN WESTWOOD TO FIND OUT THE DIFFERENCE THAT IRS WORKSHOPS MADE TO THEIR WORK.

The IRS delivers workshops across England and Wales to Social Fund staff and front line staff in Jobcentre Plus. We also help train staff in the Pension Service and a wide range of Welfare Rights organisations. The IRS Business Team deliver these workshops and as part of the 30th anniversary edition of the Journal we were asked to revisit some of the people we had delivered workshops to and interview them about:

- What they thought about us as an organisation; and
- Had the workshops they received affected the way they work and the service they provided to the customer.

In early October 2004 we delivered six half-day overview workshops to frontline staff working in the Liverpool Area. The overview workshops provide attendees with a background to the discretionary Social Fund and the role of the Independent Review Service. A lot of the staff who attend these types of workshops have very limited knowledge of Social Fund. The aim of the workshop is for staff to gain a better knowledge and awareness of the system and the review process. This enables all staff who deal with customers to be in a better position to deal with Social Fund enquiries and advise customers accordingly.

In December 2004 we re-visited Liverpool and met with the Social Fund Manager Joan Lees and her colleague Lyn Westwood, Crisis Loan Direct Team Leader. They had both attended the workshops we delivered in October 2004. We interviewed Joan about the how the workshops helped their district and canvassed her views on the IRS.

## **The set up of Liverpool Social Fund**

All processing of Social Fund work in the Liverpool

district is processed at Toxteth Jobcentre Plus office. The Social Fund Team in Liverpool has 68 staff and two Social Fund Managers. It provides a Social Fund service for 11 sites in the district.

Joan has been Social Fund Manager since April 2004. She has shared this role since October 2004 due to the volume of staff in her charge.

The centralised Social Fund section consists of a team of Social Fund Officers who process community care grant application forms, a team of Social Fund Reviewing Officers, an administration team that process budgeting loan application forms, a system recovery team and a technical team who process the non discretionary social fund. There is also a crisis loan team who deal with applications over the telephone.

## ***How did you hear about the Independent Review Service?***

Joan read the Journal and had a broad understanding of the service the IRS provides she became more aware at the case conference meetings held by the Reviewing Officers. These are held when cases are returned from the Independent Review Service. She said that she encouraged her Reviewing Officers to challenge the returned decisions if they felt they had a good case.

## ***Do you feel we are an independent organisation?***

Joan said that most definitely we were an independent organisation. We gave the customers a fair hearing and were independent of Jobcentre Plus.

## ***What was the impact of the free workshops for your organisation?***

Joan was surprised initially that it was free. She stated that she would have expected to be charged

for training. She said the workshops provided an excellent overview of Social Fund benefits and the Independent Review Service function for the Liverpool Jobcentre Plus staff – both front-line and processing staff.

Joan came on the initial workshop to see what it was all about. She found it useful as it provided a breakdown of the discretionary social fund for all staff. The staff who attended the workshops are now more confident with their knowledge of the discretionary social fund and this is benefiting the customers as they are able to advise customers better and give the customers the correct application forms. Joan added that as Social Fund has been included in the Jobcentre Plus Mystery Shopper Programme, it is essential for all staff to have a good awareness and knowledge of the Social Fund. Social Fund is a complex area of work to understand and the workshops have heightened awareness in the district.

The workshops have improved social fund awareness in the district – for front-line staff there was a grey area where social fund was concerned before the workshops took place.

Lyn Westwood, from the Crisis Loan Direct section, came to 2 of the workshops. This was useful as it provided a local slant on the process of Social Fund in Liverpool. There was plenty of discussion between the front-line and back of house staff, Lyn and the presenter.

The feedback received from the attendees was all positive. Some attendees for the later workshops came as a result of hearing colleagues talk positively about their attendance at previous IRS workshops.

#### **Would you ask for a workshop from us again?**

Joan said most definitely. She is planning to book a full week of overview workshops in February 2005 for the staff who were unable to attend last time. Also she is looking to book a full day community care grant workshop for her Reviewing Officers.

#### **Would you recommend others to have the workshops we offer?**

Joan would recommend us. She felt the workshops were extremely beneficial to the staff who had attended. She mentioned the Customer Service Charter and that the workshops would enable her

staff to provide assistance to many customers now, whereas before they would have had to refer them on to a colleague. She also stated that the customers are receiving a better service.

#### **Did you find the leaflets and handouts we issued of use?**

All frontline and back of house staff have been issued with the workshop handout. They are finding them extremely useful when assisting customers with queries. The telephone section are also using them and finding them extremely useful.

#### **Have you found the Self Instruction Packs useful?**

The reviewing officers are currently using them.

#### **What are your impressions of the Independent Review Service?**

Joan said that the Independent Review Service provides a good service to customers. It also provides guidance and training to social fund staff through the Journals and the varying type of workshops offered.

Listed below is some feedback from the evaluation sheets as completed by the attendees :-

*“Each subject covered was useful in my particular circumstances as a new Social Fund Manager with no prior knowledge of the social fund. I considered the sessions were pitched at the right level to raise awareness particularly of the customer facing staff”*

*“Very good workshop – very well presented- useful handouts”*

*“As I work on Income Support it has been useful as I can now advise the customers”*

*“I feel I will more efficiently deal with queries from customers re social fund applications and direct them better also to refer for reviews”*

*“Very useful and informative to help with applications for Social Fund”*

*“Very informative – easy to understand, rather than E-learning”*

*“Thoroughly enjoyed and very informative”*

# Back Issues of the IRS Journal and Digest

The first edition of the IRS Journal and Digest was published in Summer 1994. Since then 30 editions have been published on a wide range of topics.

The following back issues are currently available to readers free of charge:

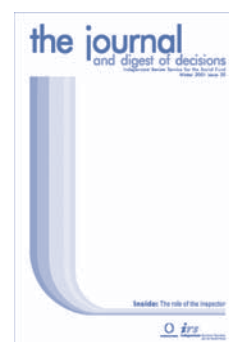
- Journal 20** - Role of the Inspector
- Journal 21** - Access to the Social Fund

We also have limited stocks available free of charge:

- Journal 14** - Access to the Social Fund
- Journal 15** - Changes to the Social Fund
- Journal 16** - Customer Service
- Journal 17** - Problems faced by Customers
- Journal 22** - Evidence
- Journal 23** - Direction 4(a)(v), refugees and shared parenting
- Journal 24** - Budget, budgeting loans and Direction 7
- Journal 25** - Amounts to award, Judicial Reviews and crisis loans by telephone
- Journal 26** - Direction 4(a)(ii), Direction 4(a)(iii) and Direction 7
- Journal 27** - Access and Justice
- Journal 28** - Making the Right Decision and Ensuring Quality at the IRS
- Journal 29** - Setting up home - Direction 4(a)(v)

If you would like to receive a copy of any of the above back issues of the Journal please contact **Brian Sigley** on **0121 606 2155** or at [bjs@irs-review.org.uk](mailto:bjs@irs-review.org.uk)

Alternatively, back issues can be downloaded from the IRS website at [www.irs-review.org.uk](http://www.irs-review.org.uk)



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