

DEVELOPING THE INFORMATION ROLE OF THE BENEFITS AGENCY AND ITS LOCAL OFFICES

Before considering how the Benefits Agency might develop its information role, it is helpful to review the needs for information that can occur during the claim process. There is, in fact, a spectrum of different needs that are often lumped together under the umbrella of *information and advice*. It was clear from reading the many reports on the potential information and advice role of local offices that there has been a confusion about exactly what this encompasses, and exactly what other advice agencies do.

Potential claimants need to be alerted to the range of benefits on offer that they might be eligible to claim, and told how they can find out more information. Essentially this is a *publicity* function.

Those who wish to consider making a claim need personalised *information* about their eligibility; the claim process and how much money they might expect to receive. They may also need *guidance* about other benefits they may be entitled to either in addition to or instead of the benefit they wish to claim.

Having made a claim they may need to receive *guidance or advice* about whether they are getting the right amount or, if they were refused or assessed for less than they thought, about whether the decision was correct. They may also need *advice and assistance* about challenging the decision made by local office staff.

In the longer term, claimants may need *advice* on the implications of subsequent changes to their circumstances and benefit entitlement and *assistance or an advocate* if there are problems with their benefit payments.

At either end of the spectrum there can be little doubt about the most appropriate role for the Benefits Agency. It has a clear responsibility for publicising benefits and, as the Framework Document governing the Agency's operation explains,

to provide comprehensive information to the public on social security benefits, in accordance with guidance from the Secretary of State, so that they are informed about their entitlements and enabled to claim and receive benefits...

Much of this work is best carried out nationally, although there is a clear role for local initiatives. Recent years have seen an increase in outreach work by information officers based in local offices.

Similarly, there can be no doubt that Benefits Agency staff cannot assist or act as advocates for claimants who feel they have not had their claims handled appropriately. Just as those who are self-employed will employ an accountant to handle their dealings with the Inland Revenue, benefit claimants may wish to consult an independent adviser

in a CAB, law centre or other advice agency about their social security claims. It is the middle ground of information, guidance and advice that is less clear.

Beveridge envisaged that:

There should be, in every local social security office, an advice bureau to which every person in doubt or difficulty can be referred and which will be able to tell him, not only about all the official provision for social security, but also about all the other organisations – official, semi-official and voluntary, central or local – which may be able to help him in his difficulty.

This recommendation has been taken up by a number of official reports since. A review of public caller offices identified the need for a national policy for offering information and advice to claimants. This, it was suggested, should involve restructuring the existing caller office network to provide:

- u a full-time advice centre, in attractive accessible offices, in each large town;
- u mobile centres offering similar, but part-time, advice services in smaller towns;
- u benefit clinics or surgeries, backed up with freephone services, in rural areas (Earley 1987).

Others have felt that the Department's remit allowed them to provide information and guidance but could not extend to giving advice to claimants. The *DHSS Working Party on Local Office Callers and Structure* was of this view. They reported that the public were demanding:

local, face-to-face contact and service which is speedy, reliable, helpful and friendly... advice as well as information... [but] it would be imprudent (even if it were possible) for the Department to move significantly beyond supplying the relevant information and or guidance. Rules change, people's circumstances alter, and well-intentioned advice can all too often 'backfire' (DHSS 1984).

The National Audit Office reached a roughly similar conclusion several years later. It believed that, although the Department was committed to the provision of comprehensive, accurate and comprehensible information about benefit entitlement, social security legislation put the onus of claiming on the individual. So that if staff in a local office were to advise a claimant to take one course of action rather than another 'serious legal issues' might be raised (National Audit Office 1988).

The House of Commons Public Accounts Committee also accepted the DSS's interpretation of legislation that it was for the individual to decide whether or not to claim a social security benefit. But the Committee stated that they:

...firmly believe that Parliament intended that individuals' decisions should be based on the best possible information. We therefore consider it essential that claimants and potential claimants ... are fully aware of the benefits for which they are eligible. They should know how to claim those benefits and should not be put off by the image of the claim process itself. We note that local offices have a vital part to play in discharging the Department's role of providing adequate information and advice ... but we are not satisfied that all offices are adequately fulfilling the Department's role (Committee of Public Accounts 1988).

Regardless of the legal issues, there were practical constraints on the work that could be undertaken in local offices. Advising claimants took considerable time and required experienced and trained staff (Elford 1989, Moodie and others 1988). Local office staff in our case study agreed that these were still real constraints. They saw information provision as the 'Cinderella' service that tended to be squeezed out in order to meet specific service delivery targets. The *Regional Organisation Scrutiny* team also noted that local staff thought that many claimants went to outside agencies because they could be sure of a private, face-to-face discussion in a sympathetic, unhurried environment, 'in stark contrast to what many have come to expect when they come to our local offices' (Moodie and others 1988).

So far we have only considered meeting needs through passive information services. There were also latent information needs that would never be identified by such passive services. It is here that other advisers, both the formal advice agencies and informal advisers, have a clear role to play. They are in a position, in the course of assisting people with other problems or areas of their lives, to identify people who have failed to claim benefits to which they were entitled. The Benefits Agency role would be to provide information and support to the agencies concerned, especially to professionals who advise on benefits as an incidental part of their job and part-time local advice points staffed by volunteers (Perkins Roberts and Moore 1992).

The evidence seemed to suggest that, far from advice centres having usurped the information role of local social security offices, there were still unmet needs for information and guidance to claimants, especially about eligibility. The way in which work was organised in Benefits Agency local offices meant that these needs could not easily be met.

The basic philosophy of the Benefits Agency offers a clear opportunity for local offices to develop for themselves the most appropriate information role to meet the needs in their locality. In doing so they need to take into account other information and advice resources within the communities they serve and seek to strengthen and complement them where appropriate. But this needs to take place within an overall information strategy and a detailed understanding of the roles played by other advice centres.