

Top Tips for running successful take-up campaigns

What do you need to do:

Set out below are the main factors you need to take into consideration when planning and running your campaign. Practical examples are given in the good practice case studies [\[link\]](#).

1. Plan your campaign.
2. Identify target groups – which group(s) and which benefit/tax credit(s).
3. Involve partner organisations.
4. Communicate your message.
5. Tips for success.
6. Measure outcomes.

1. Plan your campaign

Any benefits take-up work requires good forward planning to be successful and this guide aims to give practical advice for promoting take-up. You will be looking at:

- The overall goal of the project.
- The outcomes it aims to achieve.
- The take-up model which will best achieve the outcomes.
- The time scale for the project.
- How success will be measured (or how the project will be evaluated).

2. Identify target groups

Defining your target group will give your work a clear focus. There are number of factors to take into account:

- Your campaign goals and desired outcomes – for example, you may want to achieve large numbers of additional claims or you may want to concentrate effort on those most in need.
- Groups who are under-claiming, including hard-to-reach communities.
- Referring to poverty and social exclusion indicators may also help you identify areas of local need. With the advent of community strategies, many local authorities are being much more strategic in planning benefits take-up work and working with partners, in particular via Local Strategic Partnerships and Local Area Agreements.
- Changes in the benefits system, which open up the possibility of entitlement to new people for example the North Yorkshire Welfare Benefits Unit Great News campaign to promote the opportunities to claim since the full disregard of child maintenance from October 2008.

To work out who is under-claiming benefits and tax credits, you can draw on a number of sources:

- National take-up figures from Department for Work and Pensions and HMRC. It is extremely difficult to get estimates of take-up rates at anything

other than a national figure. We know the number of claimants at ward level, but not the number of those who are entitled but have not claimed.

- Local benefit award figures.
- Housing and council tax benefit data.
- Views of users.
- Experience of partner organisations such as advice organisations.
- Your council's research or information staff who may well have information on your local population which could help you target your work.

The good practice case studies document available from the Child poverty toolkit website highlights two Citizens Advice Bureaux running tax credit take-up campaigns funded by HMRC in Selby and Brent.

3. Involve partner organisations

You will certainly need to work with others in your take-up campaign. This might be different parts of the council but will also be partner agencies who are in contact with parents. Partners can help you both plan and deliver your campaign. They will have insights to offer on what parents need in terms of advice and support and the best ways to communicate with them.

Potential partners include:

- In councils: –Welfare Rights Unit, Revenues and Benefits, Adult Services, Children's and Young People's Service/Children's Trust, Regeneration, , Housing Department, libraries and one-stop shops, Early Years Partnerships, Children's Information Services.
- Schools.
- Children's Centres.
- Advice agencies – local and/or national.
- GP surgeries.
- Health staff including health visitors and other staff from the Primary Care Trust, Child and Adolescent Mental Health Service (CAMHS).
- Parent Partnership and other parent support groups.
- Community organisations such as carers organisations, disability groups, black and minority ethnic organisations.
- HMRC.
- Arms Length Management Organisation and registered social landlords.
- National charities such as MacMillan.
- Faith groups.
- Energy suppliers.
- Trade unions.
- Large employers.

Any take-up campaign will have knock on effects for other advice agencies and related service providers, and therefore involving them in the campaign and enlisting their support is essential. Thought needs to be given as to when and how is the most effective and inclusive way to involve others, sometimes at the initial planning stages, and sometimes when there is a clearer idea of who you are targeting.

Voluntary, community and faith organisations have contact with people who may not be claiming their full entitlements. Information can be usefully distributed in co-operation with these groups or staff – paid and volunteers - can be trained to help their clients complete claims for benefits. They could be approached well in advance to ask them for their ideas and whether they wish to be involved. Umbrella groups may be an effective way of making this approach.

Experience shows that parents like to receive advice and information from someone they trust, so it's good practice to recruit different professionals like health visitors or doctors to help. You need to take care though that they don't see this as extra work on top of their "day job" or worry that they will have to become experts in the benefits system. Their main role is to signpost people to extra help.

Involving partners also helps you to link advice and support on different services. Parents may well need support on a number of different fronts. For example parents going into work will probably need childcare as well as benefits advice. There are two examples of take-up work linked to childcare in the Good Practice document on the Child Poverty toolkit website, one run by the Daycare Trust and one run by Hertfordshire County Council.

The Good Practice document on the Child Poverty toolkit website gives more details of the wide range of organisations who can be involved effectively in take up campaigns.

4. Communicate your message

A number of factors need to be considered:

- What audiences are being approached – is it direct to potential claimants or via third parties.
- What materials will need to be produced.
- How will you disseminate the materials.
- What other ways are there of getting out the campaign message – do you need a publicity strategy?

The answer to these questions will depend in part on the level of funding available and what local contacts you have who could help spread the word. Check whether anyone in your council has done work to find out which "channels" local people prefer to use to receive information. A basic understanding of which groups of people read local newspapers or listen to local radio for example can give you a good starting point for focusing your efforts.

4.1 Campaign materials Good quality, relevant information in an appropriate format is crucial to any take-up work. The 'Quids for Kids' tool-kit will shortly provide you with sample materials, which could form the basis for your campaign information.

Types of written material you may want to consider:

- Flyers.
- Leaflets.
- Posters.

- Training packs.
- Frequently Asked Questions (FAQs) for local authority call centres/contact centres/one-stop shops.
- Websites.

When designing any material, you need to consider providing it in formats, which cater for groups with specific needs:

- Different languages, for non-English speaking communities
- Large print, taped or easy read version.
- DVD for example the Easington District Council DVD promoting housing and council tax benefits and how to access the benefits service.

4.2 Which channels to use

There are a large number of ways of getting the take-up message out. You will need to decide which of these are appropriate to your target group and budget:

- Media work – newspapers, radio and if possible TV.
- Newsletters – local authority, local groups, parish magazines.
- Mailshots – blanket and targeted.
- A launch event and other publicity stunts.
- Stalls in public places – shopping centres, leisure centres.
- Outreach advice sessions.
- Talks to groups.
- Training sessions.

E-marketing is a useful way to reach some target groups. For example young people are more likely to look for information on a website, a local employer may include an information article on their intranet, or a group of professionals who work with your target group may have a website or receive regular e-newsletters. E-forums and bulletin boards on websites that are aimed at your target group may also be a good place to advertise a service, an event or to get across important information.

5. Tips for success

The Good Practice toolkit highlights excellent take-up initiatives led by local authorities and voluntary sector organisations. The examples included cover a range of effective take-up approaches. Many of the campaigns cited incorporated a combination of approaches described below.

- **Media and PR activity**

Successful approaches to engaging the media include:

- Sell your story as interesting and newsworthy, for example can you tie in your message with a national news story about benefits or tax credits.
- Identify the best spokesperson and be prepared to answer media enquiries quickly.

- Find case studies of successful claimants from your target group or who illustrate a key message in your information campaign, and who would be happy to be interviewed.

- **Targeted advertising.**

This approach is helpful when trying to reach specific client groups. It targets particular places, publications, agencies that the client is most likely to come into contact with. This approach can reach large numbers and generate a high volume of enquiries, but a distinct advantage of this approach is that the publicity can be staggered. Any resultant follow-up work is more manageable as it is spread over a period of time.

- **Targeted mailshots**

Direct mailshots can target people who have been identified from data the local authority already holds as eligible for particular benefits. Housing benefit and council tax benefit (HB/CTB) records are the most commonly used sources to identify potential claimants. Local authority departments operate databases that can identify HB/CTB claimants who seem eligible for tax credits or income support. Once they've been identified, the individuals can be contacted regarding possible entitlement and what to do to claim. For example, More For Me & My Kids (MFMK) is the title adopted for the Tackling Lone Parent Worklessness strand of the Rightfully Yours initiative led by the Southwark Works partnership. MFMK was launched in spring 2005 and supported the aims of Southwark's Employment Strategy and Employment Zone partners by using detailed data held by the Council's Revenues and Benefit Service on some eight thousand workless lone parents to promote the message that work pays for lone parents, using targeted direct mail to get the message out to workless lone parents and including a hotline number for lone parents to contact local EZ providers.

Partner organisations can also send mailshots to their members/service users, for example PCT child development centres can write to families of disabled children in touch with community paediatric services to promote claims for disability living allowance.

Employees of large companies and public sector organisations can be targeted via wage slips and letters from HR.

- **Advice events and roadshows**

Local campaigns have promoted take-up by tapping into planned community events such as local festivals and fun days. Other events during the year will be natural launch pads for publicising take-up itself (eg - an Advice Week) or for clients groups (eg - Carers Rights Day, World Mental Health Day). Another approach is to take out the advice service to one-off events or roadshows, such as family fun days and child safety days.

- **Outreach advice surgeries**

Taking advice out to where local people are clearly makes it easier for potential clients to access advice. There are a variety of forms of outreach advice work. These range from regular advice sessions in places like Family

Centres, libraries, leisure centres and community centres, 'roving' advice (eg - through mobile libraries, advice buses), and provision of electronic and video advice links. These approaches are especially useful in rural areas where the availability and cost of transport are a particular problem. Devon got round this problem by offering home visits (see the Good Practice document on the Child Poverty toolkit website for more information).

- **Assistance to claim and appeal**

Most successful campaigns are those which can offer a personalised approach to individuals. Assistance to claim needs to be efficient, customer friendly and able to cope with the demand.

Before campaign publicity is designed, a decision must be made as to how much follow-up support can be offered. This may be at a number of levels:

- Obtaining claim forms.
- Help with completing claim forms.
- Signposting enquiries to an advice service
- Freepost address.
- Telephone helpline.
- Face-to-face advice – drop-in or by appointment.
- Home visits.
- Full casework and representation service.

You need to work out how you will handle an increased volume of enquiries.

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6. Measure outcomes

Time-limited campaigns

When planning time-limited take-up work, an exit strategy needs to be considered. If the evaluation has proved the project to be a success, the exit strategy ideally should involve mainstreaming the work. Your monitoring should help you make the case. If the service is not able to continue in the same or different guise, then expectations of the users need to be managed.

How are you going to measure success?

In the modern climate of 'evidence-based practice', most funders will expect you to be able to show that the take-up work is effective and efficient. Designing and setting up monitoring systems for the take-up project is one of the most essential parts of the planning process.

Monitoring and evaluation procedures need to be built into the development stages of new initiatives. It is important that clear and consistent methods are put in place for the collection of data on benefits checks and new claims.

Things you may wish to monitor:

- The number of enquiries that resulted from the campaign.
- The profile of clients helped, for example, client group, housing status, number and ages of children, ethnicity.

- Financial gains for clients, for example by helping them to obtain new and increased benefit, including one-off payments such as maternity grants and annual increases in income. Potential estimated weekly or annual gain can be the result of:
 - New claims made.
 - A benefit check revealing an error in entitlement.
 - Challenging a decision relating to the amount of the award or recovery of an overpayment.

- The benefits to families of financial gains for example:
 - How did the increase in benefits and tax credits improve the quality of family life?
 - Did the increase in benefits prevent the family being evicted or facing court proceedings for debt?
 - Did a successful claim for tax credits enable someone to enter or remain in employment?

This qualitative information can be gathered from questionnaires, follow-up interviews, user focus groups, stakeholder interviews or letter of thanks from clients.

You may wish, in the longer term, to compare numbers of benefit and tax credit recipients over the course of a campaign.

Find out more

Look at the Child Poverty toolkit website Good Practice document to find out more about successful take-up campaigns.