

Route Map for Streamlining Welsh Benefits Phase 1 (up to April 2026)

Phase 1 - Route map for Streamlining Welsh Benefits

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Collective Vision for Welsh Benefits

A person-centred, compassionate, and consistent approach to the design and delivery of Welsh Benefits, underpinned by the [Welsh Benefits Charter](#) principles, which enables people to only tell their story once to receive all the financial support to which they are entitled, regardless of where they live in Wales.

Background and Purpose

We know the benefits provided by the Welsh Government, which include support like Free School Meals, Council Tax Reduction Scheme, Schools Essentials Grant, Education Maintenance Allowance are a lifeline for hundreds of thousands of people in Wales. However, we also know some people are still not claiming their entitlements, and this must change. The reasons behind this are often complex and varied but we know being confused as to what you are entitled to, complicated application forms and having to prove eligibility multiple times all contribute to this.

It is a key shared commitment for Welsh Government and local government to encourage people to claim every pound they are entitled to and by bringing together partners with the same common goal, there is already a long history of successful income maximisation work from all those involved which has benefitted thousands of households across Wales. In line with this commitment, we are seeking to streamline and simplify access to the series of grants and payments made to individuals which are governed by the Welsh Government and delivered by local authorities and other organisations. This is a huge undertaking and involves a collaborative approach not only between Welsh Government and local authorities but by involving key organisations like the Centre for Digital Public Services (CDPS), the Welsh Local Government Association (WLGA), advice services and many other third sector organisations who work tirelessly to improve access to services for people across Wales.

Critical to this work is the experience of individuals who claim Welsh benefits. We are committed to ensuring improvements for people in Wales which means we must listen and take into account the views of individuals who are currently receiving our financial support. We are grateful to organisations such as The Bevan Foundation who have undertaken years of research on this matter including lived experience examples which has provided us with useful insight upon which to build our route map. We are also grateful to colleagues in local authorities for sharing their experiences of delivering these payments to hundreds of thousands of vulnerable customers over many years.

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This **route map** sets out the initial steps required to move us closer to our ambition and is intended to be the starting point only. The route map will remain fluid as work progresses to ensure there is room to grow and make changes as and where necessary and in line with the evidence. This is intended to be a route map for Phase 1 only (up to April 2026) - where we examine three key local authority benefits (Council Tax Reduction Scheme, Free School Meals and Schools Essentials Grant) and how they are accessed to understand how we can improve the user experience and how we can use this experience to support the work to streamline Welsh Benefits.

What have we done so far?

Since the launch of the Welsh Benefits Charter in January 2024, there has been a renewed focus on working collaboratively to turn the commitments in the Charter into reality. The Welsh Benefits Charter sets out the principles for the design and delivery of a person-centred, compassionate and coherent Welsh Benefits system.

All 22 local authorities in Wales have signed up to the Charter and are working towards the commitments. The publication of the Charter sets the tone for the Streamlining Welsh Benefits project and is a true demonstration of what can be achieved by working collectively. We are harnessing this joint working approach as we move forward with the actions on the route map.

Independently chaired by Fran Targett, a (Streamlining Welsh Benefits) Steering Group was set up in 2024 and has met regularly to set out the strategic direction and agree a phased approach to the work. This will mean the first phase will concentrate on three key local authority delivered benefits namely Council Tax Reduction Scheme, Free School Meals and Schools Essentials Grant where we have already seen good practice across many local authorities in Wales which we intend to harness and build upon. Further information on the work of the steering group can be found here [Streamlining Welsh Benefits Steering Group | GOV.WALES](#).

The steering group has established a number of workstreams to support the initial development of the route map (as the project progresses the workstream structure may be reviewed to take into account overlapping actions and work areas):

- Phase 1 (focusing on Council Tax Reduction Scheme, Schools Essentials Grant, Free School Meals)
- Eligibility (to develop a route map for bringing other benefits into the streamlined process)
- Monitoring, Evaluation and Research (developing a logic model and analysis of research requirements)
- Design and Data (focusing on improved data sharing and simplified design)

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- Learning and Development (identifying Learning and Development that may be required for Local Authorities and sharing good practice)
- Strategic Communications (developing a comms strategy and consistent messaging for the programme)

A Local Government SRO Group has also been established which brings together the Senior Responsible Officer from each local authority who is responsible for driving forward this work within their local authority. As the project progresses the SRO Group will provide vital expertise and guidance to the steering group and play a key advisory role to both the steering group and workstreams.

A Core Team has been developed comprised of officials from WLGA, CDPS and Welsh Government to support the work of the steering group, workstreams and SRO group which reflects the overarching collaborative nature of the project.

What does success look like?

- The long-term aim for the programme is for an individual to access their financial entitlements in a simplified way no matter where they live in Wales. People will be able to tell their story once to receive what they are entitled to, rather than provide duplicate information and evidence numerous times.
- There will be a cultural shift in society towards rights and entitlements, whereby, barriers such as stigma are considered and removed as far as possible.
- The commitments and outcomes within the [Welsh Benefits Charter](#) will underpin the success of these aims.

Phase 1 success has been defined as all Local Authorities in Wales delivering the three selected benefits more coherently. This will mean that people across Wales will only have to provide their information and supporting evidence once to claim Council Tax Reduction Scheme, Free School Meals, and the School Essentials Grant. The aim is for this to happen across all local authorities by **April 2026**. The route map will be updated to include actions to work towards subsequent phases taking into consideration lessons learnt from the first phase.

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Methodology

The first table maps out the commitments in the charter against five strategic objectives – Simplified, Inclusive, Person-centred, Coherent and Futureproof. The second table shows high level priority actions needing to be undertaken underneath these objectives and who is responsible with a time frame for completion. There are clearly interdependencies between some of the priorities which will be discussed by workstreams and mapped across to avoid duplication of activity.

It must be noted that the aim of this route map is not to prescribe all the activities that will be undertaken as part of the programme rather to provide high level direction with the aim of shifting delivery of Welsh Benefits further along to the end goal. There is recognition that the route map will evolve and the priorities and outputs are subject to refinement as the work progresses.

Timescales in the route map have been set out via financial years so that Q4 2024 means Jan to March 25, Q1 2025 means April to July 2025 and so on. These have been discussed and agreed via workstream meetings which took place in October 2024.

All dates are indicative and will be subject to change as the work progresses and in discussion with Local Government and the steering group.

Table 1 – Commitment Charters into Strategic Objectives

(table below needs to sit underneath this heading)

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SIMPLIFIED	INCLUSIVE	PERSON-CENTRED	COHERENT	FUTURE PROOF
Operates in accordance with the Welsh Language Standards and Welsh Language (Wales) Measure 2011, promoting and facilitating the ability of citizens to access the system easily in clear, accessible Welsh.	Demonstrates fairness and equality in the delivery of Welsh Benefits to ensure dignity and respect in the treatment of individuals without discrimination.	Evaluates processes and systems with the people who will use them before finally putting them into operation.	Ensures new Welsh benefits are designed to complement the existing devolved benefits system, identifying gaps in current provision.	Makes a positive difference in Wales which is aligned with the Well-being of Future Generation Wales Act. 'Prosperity for All: the national strategy'
Adapts processes and systems to meet individual needs and preferences and explores methods which will ensure Welsh benefits are accessible via multiple communication channels – digital, phone or postal methods.	Meets the needs of marginalised and disadvantaged groups who are particularly at risk of experiencing poverty, recognising the diversity of the people of Wales as encompassed by the Equality Act 2010	Flexible and not based on a one-size fits all methodology – can respond to the changes and pressures of lives of people in Wales,	Work towards a single access point for Welsh Benefits	Raises awareness and enables take-up of entitlements through referring people to independent advice and support at an early stage to: <ul style="list-style-type: none"> identify and address the causes of financial hardship, helping to break the cycle of poverty; and for help to make their application for financial support and challenge decisions.
Adheres to Digital Service Standards for Wales.	Ensures everyone is treated equally, fairly and without discrimination and that the social model of disability is adopted by all delivery partners.	Informed Welsh policy which has involved partners and individuals and other stakeholders in its development.	Raises awareness and enables take-up of entitlements through: <ul style="list-style-type: none"> ensuring staff delivering Welsh benefits are knowledgeable and experienced and receive ongoing training in the delivery of up-to date advice and appropriate support. 	Outcomes are improved for children and young people from low-income households, supporting them to have a better future and reach their full potential.
Take-up measured by the number of people supported via Welsh Government benefit schemes.	Identifies and removes the barriers that prevent people from claiming their entitlements and proactively helps people to access the financial support they are entitled to.	Allocates resources fairly and efficiently across Wales to deliver a service which puts people first.	Raises awareness and enables take-up of entitlements through: <ul style="list-style-type: none"> continuing to work with the Department for Work and Pensions (DWP) to raise awareness and promote the take-up of non-devolved benefits in Wales. 	Increased take-up of Welsh benefits, helping to maximise household incomes and contribute to tackling poverty in Wales.
	Raises awareness and enables take-up of entitlements through: <ul style="list-style-type: none"> the delivery of communications, using all media channels, that promote a positive view of entitlements and are in accessible formats including Easy Read, BSL and community and Welsh languages. 	Encourages and responds to feedback to enable the delivery of the best service possible	Facilitates identification of eligibility of other financial support.	Financially resilient communities are developed through our commitment to alleviate and prevent poverty.
	Awareness of benefit entitlement and the support available is improved through clear messaging on Welsh and non-devolved benefits which also challenges myths and stereotypes.		Makes use of data sharing for the good of the public in line with General Data Protection Regulations (GDPR)	There is a reduction in the need for emergency aid such as food banks as households are supported to become financially resilient.

Table 2 – The route map

(tables below needs to sit underneath this heading)

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A Simplified Welsh Benefits System				
Priority	Output	Impact	By When	Lead Contributor
Understand all the administrative functions, i.e. data analysis: applications, evidence to demonstrate entitlement, decision making, etc., undertaken by Local Authorities in their delivery of individual Welsh benefits and identify where functions can be simplified without increasing the risk of fraud and error.	<ul style="list-style-type: none"> Mapping exercise of the three Welsh benefits setting out a visual representation of the end to end process for all 22 LA's of the three Welsh benefits to include how people are influenced to make an application and their point of entry. 	<p>Gain an in depth understanding of the situation as is and suggest ways in which this can be improved.</p> <p>Learn the lessons following the analysis of the first phase benefits following the analysis of the three first phase benefits.</p>	Q1 (tax year) 2025	Phase 1 Workstream <u>Supported by:</u> Local Government SRO Group WLGA Eligibility Workstream Data and Design workstream Research workstream CDPS
Understand the legislation and policy that direct and govern the setting of eligibility criteria for individual Welsh benefits and identify where cohorts overlap, where there are rationales for differences, and where eligibility could be aligned with other benefits to enable them to be streamlined.	<ul style="list-style-type: none"> Legislative and policy intent for each benefit to be mapped out and synergies or reasons for differences to be identified. Explore how each LA determine eligibility for the three phase 1 benefits. 	Gain an in depth understanding of the situation as is and whether there is scope to align eligibility of benefits.	Q1 2025	Led by Eligibility workstream Supported by WG policy leads
Identify the processes through which Local Authorities can deliver	<ul style="list-style-type: none"> Review mapping exercise to identify best practice 	To identify best practice and disseminate.	Q2 2025	Led by Eligibility workstream Supported by WG policy leads

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the three benefits in Phase 1 seamlessly and consistently	<ul style="list-style-type: none"> • Examine how some LA's are already delivering seamlessly and set this out in a guidance document for all LA's. • Identify any barriers for other LA's that could stop them from replicating processes used elsewhere. 			Phase 1 Workstream Supported by Local Government SRO Group WLGA Eligibility Workstream Date workstream Research workstream
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An Inclusive Welsh Benefits System				
Priority	Output	Impact	By When	Lead Contributor
Undertake user research of both citizens and the workforce to understand their experience and pain points. Also, to establish the benefits and barriers from an application, processing, and maintaining a claim perspective	<ul style="list-style-type: none"> User research specifically looking at marginalised groups to identify specific barriers to successfully applying and maintaining for support especially for those with protected characteristics Overarching action plan to tackle equity and inclusion for delivery of the three Welsh benefits to be developed based on barriers identified. 	This will help us to understand how we can reach marginalised groups and take targeted action to remove barriers to accessing support	Q2 2025	Supported by : Phase One Eligibility
Identify key general public audiences and stakeholder/partner organisations whose positive engagement will be needed to reach key audiences.	<ul style="list-style-type: none"> Develop a greater understanding of who we need to reach – who is the target audience that we need to engage with in order 	Enable promotion to the widest audience possible. Targeting those who are seldom heard.	Q1 2025	

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	<p>to complete phase 1 and the same for further stages</p> <ul style="list-style-type: none"> List of key contacts to be developed for this project who can assist with reaching the widest possible audience and advise on inclusive communication 			Supported by: Phase One
Develop a strategy for reaching target audiences -including necessary asset development. Prioritise a suite of key messaging for consistent communication across partners.	<ul style="list-style-type: none"> Publish a high-level overview of communication strategy for each phase of the project starting with phase one Toolkit of assets that stakeholders can use to promote the project. These need to be available in all formats 	Coherent consistent messaging about Welsh Benefits	Q3 2025	
Ensure that all application methods/promotion materials are accessible.	<ul style="list-style-type: none"> Carry out an accessibility audit on application methods Carry out an accessibility audit on promotional materials 	Inclusive comms across the Welsh Benefits	<p>(As part of User Research - Q2, 25)</p> <p>(Phase 1 - Lead) (Q4, 25)</p>	

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			(Communications - Lead)	
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A Person-centred Welsh Benefits System				
Priority	Output	Impact	By When	Lead Contributor
Identify available insight on 'barriers to take up' of benefits amongst target audiences from a promotional comms perspective. Specifically look for any existing insight on 'terminology' as a barrier.	<ul style="list-style-type: none"> Good practice language guide to be produce which eliminates discrimination and removes barriers to accessing entitlements. 	This will remove stigma and enable the culture shift towards rights and entitlements that the Welsh Benefit Charter was intended to stimulate.	Q2 2025	Supported by Phase One Eligibility
Gain a better understanding of how flexible current processes are and the extent to which they can be adjusted to suit individuals needs.	<ul style="list-style-type: none"> Mystery shopper exercise to be carried out using a range of different circumstances to test flexibility of current system (To be considered alongside user research) Consider how Job Centre Plus signpost to Welsh benefits 	Understand how we can ensure the delivery of Welsh Benefits is person centred	Q3 2025	

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A Coherent Welsh Benefits System				
Priority	Output	Impact	By When	Lead Contributor
Develop a baseline understanding of existing data capture requirements for Welsh benefits and identify where data duplication exists.	<ul style="list-style-type: none"> Report detailing the existing data capture requirements for Welsh benefits, identifying where data duplication exists. 	Knowledge of the as-is situation	Q2 2025	Supported by Phase One CDPS
Develop an understanding of requirements for data sharing, and current barriers. Examine the legal and technical aspects of data sharing including DWP/HMRC requirements as stated in the annual MoU signed by all Local Authorities,	<ul style="list-style-type: none"> Report which captures requirements for data sharing and the current barriers as experienced by Local Authorities. 	Councils confident in what data can and cannot be shared.	Q3 2025	
Produce guidance for local authorities on the sharing and use of existing data which is acceptable under current DWP/HMRC requirements.	<ul style="list-style-type: none"> Issuing of guidance to all Welsh Local Authorities setting out an agreed upon position for the re-use and sharing of existing administrative data. 	Consistent use of data sharing for the passporting of entitlement to Welsh Benefits.	Q4 2025	
Share knowledge, insights, and best practice across organisational boundaries.	<ul style="list-style-type: none"> Best Practice guidance on phase 1 delivery to be produced Forum set up for LA's to share best practice and/or lessons learnt Regular case studies to be developed and 	Share best practice across Wales to allow Local Authorities to learn lessons from other Local Authorities experiences.	Q4 2025	

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	shared via Stakeholder Newsletter			
Consider how to promote Welsh Benefits as a coherent offer so that individuals understand what they are entitled to	<ul style="list-style-type: none"> Develop a coherent design for promotion of Welsh Benefits so that it has a unified logo that can be used across the three phase 1 benefits 	Promote a parity of service across Wales	Q4 2025	

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A Future-Proof Welsh Benefits System				
Priority	Output	Impact	By When	Lead Contributor
Understand whether there are any skills gaps and identify the areas of training or support needed to deliver services in line with the commitments of the Welsh Benefits Charter.	<ul style="list-style-type: none"> • Map current training offer for benefits delivery staff for each LA • Map skills required to Charter commitments and identify where there are gaps • Consider whether there is need for a standardised training package. 	Ensure an up-to-date skilled workforce across the whole of Wales.	Q4 2025	
Bring together what is known regarding the data landscape.	<ul style="list-style-type: none"> • Report detailing what data Local Authorities and Welsh Government currently capture and how 	Identify trends and gaps in information captured and potential for monitoring Charter implementation	Q2 2025	
Develop a logic model for each stage starting with phase one.	<ul style="list-style-type: none"> • Create a visual representation of how bringing together the three phase 1 benefits will work. 	This will assist us to consider how to evaluate progress.	Q2 2025	
Identify potential research and evaluation questions to inform Phase1 and future phases of work,	<ul style="list-style-type: none"> • Agree an approach to evaluation 	This will assist us to consider how to evaluate progress.	Q3 2025	

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and to guide the work of the steering group.				
Ensure that people who claim Welsh Benefits are aware of other financial entitlements and are supported to become financially resilient	<ul style="list-style-type: none"> Develop a consistent way of signposting Advice Services as part of the application process for WB 	Everyone who claims WB will be aware how to get free advice and support and become financially resilient	Q4 2025	

This route map is published under the principles of the Welsh Benefits Charter which was formally endorsed at the Partnership Council in November 2023.

All 22 Local Authority logos to go here as per the Charter.

Annex 1 – Streamlining Welsh Government Steering Group membership

Membership of the Streamlining Welsh Benefits Steering Group.

Independent chair

- Fran Targett, Independent.

Members

- Amanda Main, Caerphilly County Borough Council.
- Anna Friend, Flintshire County Council.
- Claire Germain, Welsh Government.
- Helal Uddin, Ethnic Minorities and Youth Support Team.
- Jen Griffiths, Chair of Local Government SRO Group.
- Joanna Goodwin, Centre for Digital Public Services.
- Katie Till, The Trussell Trust.
- Lindsey Phillips, Chief Digital Officer for Local Government, Welsh Local Government Association.
- Lisa Hayward, Welsh Local Government Association.
- Matthew Evans, Welsh Revenue and Benefit Managers Group on behalf of Society of Welsh Treasurers.
- Miranda Evans, Disability Wales.
- Nigel Griffiths, Bridgend County Borough Council.
- Sean O'Neill, Children in Wales.
- Simon Hatch, Citizen's Advice Cymru.
- Steffan Evans, The Bevan Foundation.
- Victoria Lloyd, Age Alliance Wales.

Annex 2 – Governance Structure and Interdependencies

Illustration of the existing governance structure can be found below. A further representation of interdependencies will be developed before final copy.

