Review of the Local Authority Data-Led Benefit Take-Up Pilot in Wales

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Glossary

Department for Work and Pensions (DWP)

The DWP is the UK government department responsible for welfare, pensions, and supporting people into work.

Free School Meals (FSM)

A benefit that provides eligible children with free school meals, usually based on household income or receipt of qualifying benefits, aimed at supporting children from low-income families and improving educational outcomes.

HM Revenue and Customs (HMRC)

HMRC is the UK's tax, payments, and customs authority. It is the UK government department responsible for handling taxes and regulating national insurance, among other financial functions.

Low-income family tracker (LIFT)

LIFT is a data analytical tool that allows local authorities to use the data they collect to identify and target local residents who are missing out on their entitlements.

Pension Credit (PC)

Pension Credit is an income-related benefit that tops up the weekly income of pensioners who are on a low income.

Personal Independence Payment (PIP)

A benefit for people who have a long-term physical or mental health condition or impairment, providing financial support for the extra costs of daily living and/or mobility needs.

Policy in Practice

Policy in Practice is a data analytical and social policy organisation that delivers the LIFT platform for this pilot.

School Essentials Grant (SEG)

A Welsh Government grant that helps eligible low-income families with the cost of school essentials, such as uniforms, footwear, and equipment.

Theory of Change (ToC)

A comprehensive, visual, and narrative framework that explains how and why a desired, long-term change is expected to happen within a specific context.

Universal Credit (UC)

Universal Credit is a means-tested benefit that provides financial support for people who are on a low income or out of work.

Executive Summary

Background

Low take-up of entitlements is a persistent challenge in means-tested social security systems, which dominate both the Welsh Benefits System and the reserved system. For example, the most recent estimates suggest that only around 62% of people entitled to Pension Credit (PC) are claiming it (DWP, 2025). Many of the barriers to take-up – particularly awareness and complexity – could be addressed by more effective use of data, which allows likely eligible non-recipients to be identified, notified, and, potentially, supported to make a claim. Improving take-up of benefits and income maximisation more broadly is a core priority for the Welsh Government.

Policy in Practice, a social policy software and analytical company, has developed the Low Income Family Tracker (LIFT), a platform that allows local authorities to proactively identify and target financially vulnerable residents and households who are likely to be eligible for entitlements to (devolved or reserved) benefits but are not claiming them. The Welsh Government funded a pilot where 12 Welsh local authorities were provided licenses to the LIFT platform between January 2025 and March 2026. Two other local authorities were also working with the LIFT platform during this period, but were not being funded through the pilot.

This report examines the implementation of the LIFT platform in participating local authorities in Wales, the effectiveness of using data analysis for increasing benefit take-up, and the factors influencing the impact of the pilot. Hereby, it assesses the effectiveness of data analysis as an income maximisation tool. A mixed-methods approach was employed, including a desk-based review of evidence and data, scoping interviews, and the development of a Theory of Change (ToC). The stakeholder engagement included in-depth interviews with local authority representatives, a focus group with third sector and support organisations, and follow-up interviews with local authorities. Ultimately, we assessed the likely contribution of the pilot to improving benefit take-up and related outcomes. The research included a structured contribution analysis, informed by the ToC, drawing on both quantitative evidence and insights from interviews to supplement impact-related evidence.

A typology of local authorities

Based on the evidence we gathered across the work, we identified 3 broad types of participating local authorities, according to their experiences of the pilot. Type A local authorities were those that experienced the greatest difficulties in implementing and making effective use of the platform. This type included the minority of local authorities. Type B local authorities were those that were able to use the tool and conduct campaigns but faced capacity constraints, leading them to report that continued use would depend on whether the required investments are proportionate to the benefits. Finally, Type C cases were the most successful, representing local authorities that had a very positive experience with the platform and are keen to continue using it.

Implementation

Overall, the onboarding process emerged as the most challenging, and where local authorities were most likely to run into problems that slowed progress and impact. During this period, local authorities had to build internal capacity, including creating new posts, reallocating staff, and preparing teams, often requiring significant time and resources before full use of the tool could begin. Also, delays in approvals and data submissions meant that local authorities started using LIFT at different points, limiting the period of consistent data available for monitoring and engaging with benefit non-claimants. This stage was characterised by the important support provided by Policy in Practice to help local authorities navigate complex data sharing agreements, internal approvals, and unfamiliar processes.

Once the tool was set up, LIFT enabled local authorities to track eligible non-claimants and target outreach more effectively. The tool reduced the operational burden on Revenues and Benefits teams and allowed local authorities to rely more on evidence and less on assumptions. However, this stage exhibited the greatest variation in success across local authorities. Ultimately, the effectiveness of tools such as LIFT depends heavily on adequate staff capacity and the appropriate skill sets, both to analyse the data and to act on it.

Communication campaigns were predominantly in the form of sending letters, but these were often complemented with text messages, phone calls, face-to-face visits, and campaigns aimed at wider audiences, such as social media posts or advertisements in bus stops. The approaches to engagement have been carefully designed by local authorities, drawing on the learnings from previous campaigns, as well as from lessons learnt from other local authorities through the bi-monthly programme and best practice meetings. Most local authorities began the engagement by targeting PC, but then they often also expanded to other benefits, such as Attendance Allowance or Housing Benefit for pensioners.

Communication alone, however, has its limitations as a tool for driving engagement and take-up. Local authorities felt that more targeted and intensive engagement was better than broader-based letter writing with limited support or follow-up. Lack of trust of residents in the communications also emerged as a factor limiting engagement, with some recipients unsure whether the correspondence was genuine. Including a reference to the support available from Citizens Advice appeared to help increase credibility. In this way, local authorities have learnt and refined their approaches over time, considering the feedback they received from potential claimants and support and advice organisations.

Impacts

Local authorities have varied ways of assessing the likely impacts of their own campaigns on benefits take-up, including figures reported by support organisations, manual efforts linking the timings of the campaigns with the timings of claims, and LIFT's Outcomes Tracker. Nevertheless, the figures that they gave us tended to be approximately consistent with each other. On average, local authorities told us that each of them has targeted between 100 and 250 non-claimant households in each campaign, with approximately 15% of those households reported to have ultimately received a benefit award following the

campaign. This would translate to an average of approximately 20 awards per local authority following a campaign.

Time series data on PC claims and awards in Welsh local authorities do not show substantial or obvious differences in trends between participating and non-participating Welsh local authorities up to November 2025 (the latest data available at the time of writing). This is broadly consistent with the approximate estimates of the impacts of communication campaigns that local authorities reported (above), which would be modest in proportion to the total typical flow of new benefit claims, or to the overall scale of non-take-up. Nevertheless, local authorities tended to view these impacts as very worthwhile and something that would have been difficult to achieve without LIFT.

Conclusion

Although the pilot required significant set-up time, onboarding, and adequate staff capacity to use the platform effectively, these upfront demands suggest that the investment is likely to yield longer-term benefits. Most of the local authorities have learnt valuable lessons about how to use data and analytical tools for the purpose of increasing benefit take-up, and will be able to do so more effectively in future as a result. Some have also discovered additional uses beyond benefit take-up, identifying households who may benefit from other services or support. Relatedly, it is therefore very possible that the impacts enabled by the pilot will continue to grow. This would be further enhanced if lessons learnt from the pilot, such as those uncovered in this report, can inform and refine future efforts. Overall, LIFT demonstrates that data-led approaches can enhance targeting and operational efficiency, but local authorities require adequate staffing, resources, and ongoing support to fully realise its potential.

1.   Introduction

1.1.   Project context

Low take-up of entitlements is a persistent challenge in means-tested social security systems, which dominate both the Welsh Benefits System and the wider UK system. For example, the most recent estimates suggest that only around 62% of people entitled to PC are claiming it (DWP, 2025). Although there are no official estimates of take-up rates for Universal Credit (UC), which is now the main UK means-tested benefit for those of working age, figures from the mid-2010s for the legacy benefits that it has replaced indicate that non-take-up was substantial, and up to around 50% in the case of Jobseekers Allowance.

As highlighted in the Institute for Fiscal Studies' Deaton Review of Inequalities (2024), international evidence shows that non-take-up of entitlements can be driven by factors including lack of awareness or understanding, the complexity and administrative burden of claiming (especially where multiple claims are required), and the stigma associated with claiming benefits. Many of the barriers to take-up – particularly awareness and complexity – could be addressed by more effective use of data, which allows likely eligible non-recipients to be identified, notified, and, potentially, supported to make a claim, perhaps even via partial automation of the process.

Improving take-up of benefits and income maximisation more broadly is a core priority for the Welsh Government. These goals are enshrined in the Welsh Benefits Charter launched in January 2024, which sets out the guiding principles necessary for the design and delivery of a more coherent, person-centred, and accessible Welsh Benefits System. The Streamlining Welsh Benefits project is a leading example of an initiative in pursuit of this goal, aiming to reduce the number of times that people have to provide the same information in order to claim different strands of support, focusing specifically on the different elements of the Welsh Benefits System.

Policy in Practice, a social policy software and analytical company, has developed the LIFT, a data analytics platform that draws on information held on beneficiaries of Housing Benefit, the Council Tax Reduction Scheme, and UC. The platform allows local authorities to proactively identify and target financially vulnerable residents and households who are likely to be eligible for entitlements to (devolved or reserved) benefits but are not claiming them.

The Welsh Government funded a pilot where 12 Welsh local authorities (Blaenau Gwent, Bridgend, Conwy, Denbighshire, Flintshire, Monmouthshire and Torfaen (shared service), Neath Port Talbot, Newport, Powys, Wrexham, Rhondda Cynon Taf) were provided licenses to the LIFT platform between January 2025 and March 2026 (the license originally covered the period up to January 2026, but the Welsh Government announced a 2-month extension in early January). Pembrokeshire and Gwynedd were also working with the LIFT platform, but were not being funded through the pilot.

The aim of the pilot was to explore the effectiveness of using data analysis in local authorities to improve the uptake of entitlements to means-tested devolved and reserved benefits, and the extent to which using a tool like LIFT helps identify and reach out to residents who are missing out on their entitlements to financial support.

1.2.   This research

This project sought to examine: (i) the implementation of the LIFT platform in participating local authorities in Wales, including barriers and practical and operational challenges; (ii) the effectiveness of the LIFT pilot for increasing benefit take-up; and (iii) the factors influencing the impact of the pilot. Throughout the project, there was a focus on identifying learning and best practice examples that can inform all of Wales about the potential for data-led initiatives aimed at increased benefit take-up.

This project was delivered in two phases:

Phase 1 first involved scoping interviews and a desk-based review of evidence and data, including barriers to entitlement take-up, what works to address low take-up, and the role of data-led take-up initiatives. This informed the development of a ToC, which provided an organising framework for the stakeholder engagement strategy undertaken during Phases 1 and 2, and the contribution analysis conducted as part of Phase 2. The stakeholder engagement in Phase 1 combined interviews covering local authority LIFT pilot leads and a focus group with support and advice organisations. Through this, we examined in detail the implementation of the pilot.

Phase 2 started with follow-up interviews with local authorities, gathering detailed insights about the impacts of the pilot. Also, it involved analysing monitoring and secondary data. Ultimately, during this phase, we adopted a contribution analysis approach, informed by the ToC, to review the likely extent to which the pilot has achieved the outcomes intended, drawing on quantitative evidence and insights from our fieldwork. Phase 2 also involved the development of 3 local authority case studies to highlight learning and best practice relevant to all local authorities.

1.3.   Report structure

This report aims to summarise all the context, methods, and findings of the project. The structure of the report is as follows:

- Chapter 2 describes the methodological approach taken in Phases 1 and 2

- Chapter 3 describes the ToC

- Chapter 4 synthesises the findings regarding the implementation of the pilot and its associated outputs and impacts. It begins with a typology of local authorities and then presents the findings for each stage of the ToC, including differences found across types of local authorities

- Chapter 5 details 3 case studies, summarising experiences across the stages of the pilot, including its onset, the use of the platform, and the campaigns and their impacts

- Chapter 6 offers a conclusion and lessons learnt based on the findings across both phases to assess the effectiveness of the LIFT pilot

- The Annexes include all fieldwork materials

2.   Methodology

2.1.   Overall approach

This section sets out the methodological approach for Phases 1 and 2. A mixed-methods approach was employed, including a desk-based review of evidence and data, scoping interviews, the development of a ToC, in-depth interviews with local authority representatives, and a focus group with third sector and support organisations. It proved difficult to recruit benefit claimants for interview, but insights on the barriers and enablers to claiming entitlements faced by them, and their responses to the engagement by local authorities, were gathered through our interviews with local authorities and the focus group with support and advice organisations.

In Phase 2, we assessed the likely contribution of the pilot to improving benefit take-up and related outcomes, including reduced stigma associated with claiming benefits, greater awareness of what support is available, and financial wellbeing. It included a structured contribution analysis, informed by the ToC, drawing on both quantitative evidence and insights from interviews to supplement impact-related evidence gathered in Phase 1.

This final report brings together findings from both phases, on process and impact. Also, it includes 3 local authority case studies to highlight best practice applicable across local authorities.

2.2.   Research questions

- What variations are there in the aims, design, and delivery of the pilot across participating local authorities? This includes the primary target groups of take-up interventions, and the mechanisms used to increase take-up (e.g., informing of likely eligibility, referring to support or advice services, automating claiming processes)

- What are the barriers the pilot aims to remove? Which causes of non-take-up is it aiming to address?

- What prevents local authorities from addressing these problems without a third-party tool?

- Which features of design and implementation seem to make the pilot more effective, which need improvement, and why?

- What practical challenges need to be overcome, and can they be overcome more effectively? This would include the legal and operational framework for data sharing,

staff capacity, and training in how to handle the data securely and incompleteness or imperfections in the data

- What has been the experience of potential claimants who have been reached out to on the basis of this pilot, and what barriers has it removed or not removed for them?

- What were the impacts of the pilot in terms of take-up and financial gains for the households involved?

- Has the pilot had wider impacts beyond take-up (e.g., more trust in government, referral for wider forms of support or advisory services, reductions in feelings of stigma, improved financial wellbeing)?

2.3. Phase 1 – Methodological approach

2.3.1. Desk-based review of evidence and data

A desk-based review of evidence and data was conducted to support Phase 1 of the review, encompassing 3 key areas. First, a rapid review of the literature to examine the multiple barriers to benefit take-up and interventions that have been effective in addressing these barriers. The review included an in-depth reading of 11 papers and helped situate the potential role of data-led initiatives in overcoming take-up barriers, as well as to identify their limitations. For example, where lack of awareness of entitlements is a key barrier, local authorities may have powerful effects on take-up if they can identify and notify eligible individuals; where the complexity or accessibility of application processes is a barrier, streamlining or even automating parts of the claim process may be more effective, while simply alerting people to eligibility may have a limited effect; and where stigma limits take-up, the way information is communicated, and claimants are treated, is likely to be critical.

Second, the review focused on the use and impact of data analytical tools in UK local authorities. It considered opportunities, challenges, risks, practical barriers, and evidence gaps in other data-led initiatives to inform understanding of the LIFT pilot. This literature review began with a scoping exercise to identify relevant material and refine search terms. Inclusion criteria ensured relevance to implementation, impact, and geographical context, while searches covered both academic databases (JSTOR, ScienceDirect, SpringerLink, SAGE, SSRN) and grey literature from government, think tanks, research institutes, audit bodies, and third sector organisations. Search strategies combined Boolean operators and targeted keywords, and all searches were documented to ensure transparency and replicability. We identified and read 21 papers in-depth, which contributed to our understanding of the context of the use of analytical tools in the UK's local authorities and the main bottlenecks for implementing them.

Third, we undertook a data review consisting of 2 parts. First, we identified publicly available data on benefit recipients over time and at the local authority level, across different types of benefits. This data was then analysed over Phase 2 to inform the contribution narrative. Second, we reviewed monitoring data provided by the Welsh Government, comprising quarterly reports submitted by local authorities throughout the pilot. These data were used to contextualise the pilot, understand the circumstances of each local authority, and tailor

discussions with local authorities through the formulation of specific questions. Additionally, the monitoring data complemented primary research findings and helped anchor comparisons across local authorities, enhancing the overall analysis of the pilot's processes and impacts.

2.3.2. Scoping interviews

We conducted 4 scoping interviews aimed at developing a clear understanding of the policy context, the pilot's aims and objectives, key stakeholders, and the availability of relevant data. The interviews included speaking with colleagues from the Welsh Government, the Welsh Local Government Association, the Welsh Revenues & Benefits Managers group, and Policy in Practice. We also attended a bi-monthly programme and best practice meeting, where local authorities met with Welsh Government and Policy in Practice representatives to discuss barriers to implementation, best practice examples, and early results. These interviews and meetings collectively enhanced our understanding of the pilot and informed the development of the fieldwork materials.

2.3.3. Theory of Change

Drawing on scoping interviews and the literature reviews, a comprehensive ToC was developed to map the pilot's activities and the pathways through which it aims to achieve its objectives. The ToC provided a foundation for the contribution analysis, which synthesised mixed evidence sources to examine the pathways to achieving impact illustrated in the ToC, delivering a structured assessment of the extent to which these impacts are being achieved.

Variations in how local authorities implemented LIFT - such as differences in target groups, methods or barriers and enablers - have been carefully considered, as these differences offer valuable insights into what works, when, and why. To account for the different starting points and levels of success achieved by local authorities, and to guide the findings summarised in this report, we developed a single high-level ToC for all local authorities, alongside a simple typology that captures where their journeys with the pilot differ.

2.3.4. Interviews with local authorities

We conducted a total of 9 interviews with LIFT participating local authorities (although one was not funded by the Welsh Government). They were aimed at exploring the design, implementation, and delivery of the pilot at the local level, identifying successes, challenges, and the factors enabling or hindering effective implementation. Particular attention was given to data-sharing arrangements, including how these could be streamlined while maintaining robustness, and the challenges of achieving these objectives without a third-party tool.

Interviews with local authorities not participating in the pilot (n=2) examined efforts to achieve similar objectives without the use of LIFT, providing insights into the additionality of the pilot and the relative advantages and limitations of alternative approaches. This included a local authority that did not use LIFT, and another one that used LIFT without receiving any Welsh Government funding. Also, it is worth noting that, since all local authorities had the opportunity to apply to take part in the pilot, there may be systematic differences between those who participated and those who did not.

Interviews were conducted via Microsoft Teams. With participant consent, interviews were recorded and transcribed to ensure accuracy; otherwise, detailed notes were taken by an additional team member. Interviewees received information on data handling and consent procedures in advance, which was made available in English and Welsh.

Data from the interviews were analysed thematically, following Braun and Clarke's (2006) framework. This approach enabled the identification of common themes, variations in stakeholder perspectives, and areas of convergence or divergence across sectors. Findings from the interviews provided a valuable contextual understanding of the pilot, the experience local authorities had with the use of LIFT, and the impacts on take-up of benefits.

2.3.5.   Focus group with support and advice organisations

We carried out a focus group with support and advice organisations, as they are key partner organisations involved in supporting and advising residents and working with local authorities. The focus group included 5 participants, representing 4 different organisations. The organisations were:

- Citizens Advice

- Mencap

- Welfare Rights Advisors Cymru

- National Advice Network

The focus group took place remotely via Microsoft Teams. The remote format minimised participant burden and allowed greater scheduling flexibility.

The purpose of the discussion was to explore barriers to benefit take-up in Wales and their views on the responses of benefit claimants to the engagement conducted by local authorities through letters and similar approaches. We also sought to learn from their experiences working with local authorities to improve take-up and obtain views on whether data-led approaches can contribute to increasing benefit take-up by addressing the relevant barriers. Lastly, the focus group discussion included potential recommendations for future policy, practice, and design to improve awareness and take-up of benefits.

2.4.   Phase 2 – Methodological approach

In Phase 2, we assessed the likely contribution of the pilot to improving benefit take-up and potentially related outcomes, including reduced stigma associated with claiming benefits, greater awareness of what support is available, and financial wellbeing.

2.4.1.   Monitoring data analysis

The monitoring data was provided by the Welsh Government and included dates, actions taken by local authorities, and their progress throughout the pilot. This data was analysed in detail to guide the design of interviews (e.g., to understand the specific circumstances of the local authorities to be interviewed) and to complement the findings from the interviews.

2.4.2.   Follow-up interviews with local authorities

We conducted 6 interviews at this stage, mainly follow-ups with people or organisations we interviewed during Phase 1. These interviews were aimed at gathering detailed data on the outputs and short- and long-term impacts of the pilot. We collected information on the number of communication campaigns conducted, the benefits targeted, the number of households reached out to, the results in terms of claims and/or awards, and the associated financial gains, among other metrics. We also gathered information on household responses to the engagement, which provides insights into the effectiveness of the outreach, and on lessons learnt regarding the use of data to support benefit take-up. These insights were used to assess the likely contribution of the pilot to the uptake of benefits in Wales.

These interviews were held remotely on Microsoft Teams. The topic guides were tailored to the interviewee, including information from the monitoring data and interviews conducted during Phase 1, and based on gaps in knowledge, e.g., seeking information on specific practices or impacts we did not gather in the previous phase. Insights gained through the interviews were analysed thematically.

2.4.3.   Secondary data analysis

As part of the review, we examined administrative data on PC claims and awards by local authority. We chose to work with this data as a result of the data review from Phase 1. PC is the benefit that a large majority of local authorities in the pilot focused on first, and application and award data are available on a weekly basis for each Welsh local authority (covering claims and awards up to mid-November 2025). Examination of trend data for PC was, therefore, a natural complement to our primary data collection. The analysis examined trends over time to assess whether there were differences in trends between participating and non-participating local authorities.

2.4.4.   Contribution analysis

It is challenging to isolate the impact of the LIFT pilot on outcomes such as benefit take-up, awareness of entitlements, and financial wellbeing, as it operates alongside other initiatives in Wales, including the Streamlining Welsh Benefits project. To address this, the review used contribution analysis, a structured and iterative approach that assesses whether observed changes can plausibly be linked to the pilot without relying on experimental control groups.

Using the ToC as a framework, we drew on all of the qualitative and quantitative evidence gathered as part of the review to build and scrutinise an evidence-based contribution assessment. Specifically, we assessed the strength of evidence that the LIFT pilot has had the intended impacts by systematically assessing whether the key elements of the ToC have worked as intended. Initial evidence on impacts and outcomes gathered during our Phase 1 work was reviewed, and the focus of our Phase 2 fieldwork was then tailored so as to fill key remaining evidence gaps or resolve conflicting signals. The high-level diagram below summarises the key steps of our contribution analysis. The flowchart in figure 1 illustrates a five-step contribution analysis, with steps labeled from 1 to 5: Contribution

Problem, Theory of Change, Review of Existing Evidence, Contribution Assessment, and Additional Evidence & Revision. The final two steps are connected by a circular arrow indicating an iterative cycle, with red arrows separating the first three steps and dark blue arrows highlighting the loop between steps four and five.

Figure 1. Contribution analysis

Source: Alma Economics

2.4.5. Case studies

Our stakeholder engagement across both phases informed the development of 3 in-depth case studies. The aim of the case studies is to highlight different experiences with improving awareness and take-up of benefits, varying ways of implementing the pilot, barriers that have been overcome (or not), and examples of the impacts that can be achieved through effective implementation. It is important for participating local authorities to learn from each other and for all local authorities in Wales to benefit from the insights generated about how to address benefit take-up using data-led approaches, given that they share common goals in this regard.

3.   Theory of Change

The diagram below presents our ToC. It represents our understanding of the relationships between inputs, activities, outputs, outcomes, and impacts of the pilot. This ToC was reviewed and finetuned as new evidence became available throughout the project. The question marks included across the diagram indicate links that may not be consistently present across all local authorities; part of the analysis involved testing the extent to which these links hold in practice.

Figure 2: Theory of Change
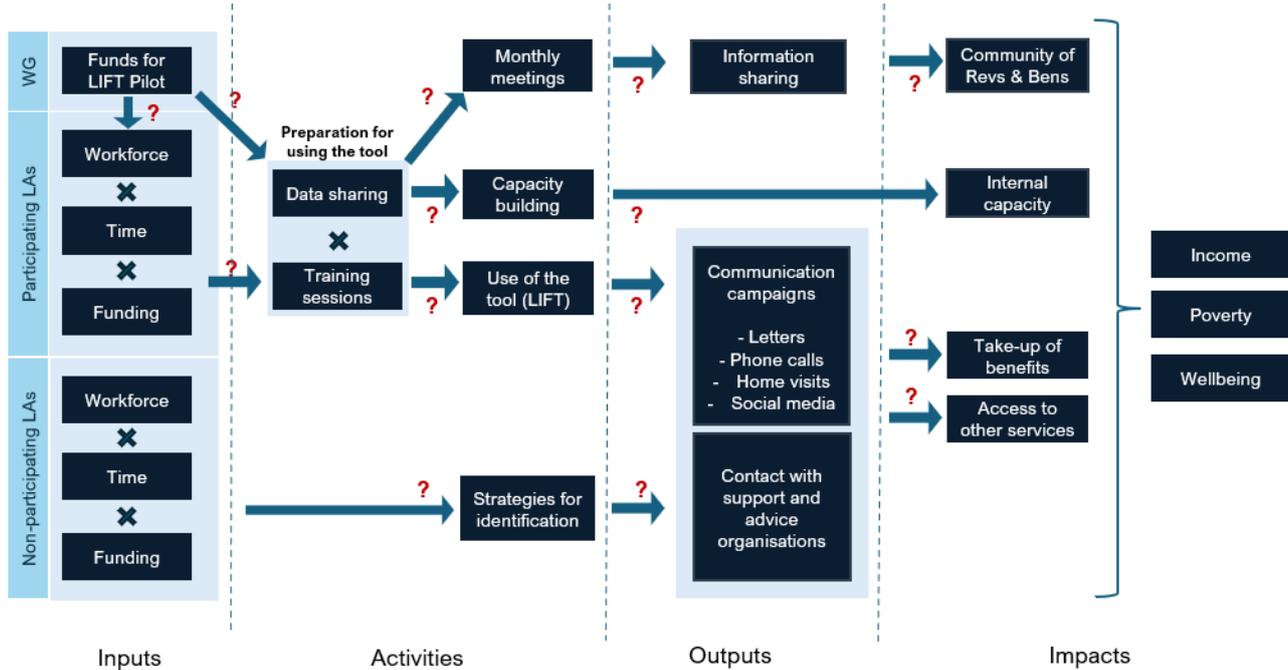
Source: Alma Economics based on primary data collection.

Below, we describe the steps depicted in the ToC in more detail. Note that this is not in itself a description of our findings in relation to whether each of these elements of the ToC is actually working as stated - it is just an explanation of the ToC itself. Our findings are presented in later sections (Chapter 4).

Inputs. The ToC is structured around 3 main actors: the Welsh Government, local authorities participating in the pilot, and non-participating local authorities. As shown in the first column (inputs), local authorities have resources in place for activities aimed at increasing take-up of benefits, including workforce (quantity, knowledge, skills), time, and funding. Local authorities generally differ in the level of these resources available, which might lead to different journeys across local authorities, as can be found in the next subsection. The Welsh Government provided additional resources (funding) to participating local authorities, enabling their participation in the LIFT pilot. From this point onwards, participating and non-participating local authorities follow different pathways.

Activities. Participating local authorities begin with an onboarding phase. This includes securing the necessary internal and external permissions for data sharing and taking part in training sessions delivered by Policy in Practice. Engagement with the tool also requires staff capacity and some expertise in terms of team management, IT knowledge, and legal requirements, among other areas. In many cases, this capacity must be developed specifically for the pilot, contributing to broader organisational capacity building. Once the onboarding and resource allocation are complete, participating local authorities can use the LIFT tool. Although the primary aim of the pilot is to help local authorities identify households that appear eligible for specific benefits but are not currently claiming them, additional data on low-income households could, in principle, be used for other purposes too (actual examples that were subsequently highlighted in our fieldwork were promoting free activities and targeting employability workshops). Participating local authorities additionally take part in monthly meetings with the Welsh Government and Policy in Practice, where they can share experiences, learn from each other, and flag challenges. Non-participating local authorities, by contrast, may or may not use the LIFT tool, and if they do not, they may operate their own strategies for identifying eligible non-claimants, like manually analysing cases, depending on their available resources and priorities.

Outputs. According to the ToC, the key intended output is the identification of non-claimant eligible households and the implementation of communication campaigns. In practice, however, it may be that not all local authorities have strictly pursued or continue to pursue these outputs. Depending on the success of the tool set-up (for participating local authorities) or of manual identification (for non-participating local authorities), local authorities proceed with either more targeted or broader communication campaigns. These campaigns vary in form and intensity and may include targeted letters, social media outreach, phone calls, or home visits. Campaigns generally lead to, or are supported by, advice and support organisations.

Impacts. Outreach activities can lead to increased take-up of benefits by improving households' access to information, reducing stigma associated with claiming benefits through language that reinforces the legitimacy of claiming support, and reducing any administrative burdens to take-up through direct contact. Where campaigns or identification processes are used more broadly, they may also facilitate improved access to other services. In many cases, communication campaigns led to contact between potential claimants and support and advice organisations, which supported them with the application process. Participating local authorities may additionally benefit from strengthened internal capacity and enhanced information sharing, particularly through the regular interactions among Revenues and Benefits teams, potentially resulting in other positive outcomes.

In the longer term, the outputs are expected to support broader objectives related to income maximisation, poverty reduction, and improved wellbeing. By helping households access financial support to which they are entitled, the pilot has the potential to strengthen financial resilience, reduce financial stress, and contribute to more stable living conditions. Collectively, these effects may help alleviate pressure on households and support improvements in overall wellbeing over time.

It is important to note that not all links in this pathway will apply in every case, and some local authorities may not progress through all steps. Nonetheless, this model represented our working understanding of how the pilot was intended to function, which was refined as further data and insights became available.

4. Findings

4.1. Context: Levels of, and barriers to, benefit take-up

Benefit take-up rates differ across benefit types and demographic groups, reflecting variations in eligibility, application processes, household circumstances, and the specific barriers that can prevent households from claiming the support to which they are entitled.

Complexities in measuring the take-up of UC since its gradual roll-out beginning in the mid-2010s mean that we do not have official up-to-date estimates of take-up for the current major working-age benefit. Based on data from 2014–15, however, around 1 in 7 pounds of means-tested or contributory working-age entitlements went unclaimed across the UK. We know that the non-take-up rates of some particular "legacy benefits" were especially large. For Jobseeker's Allowance and Working Tax Credit (WTC) among families without children (who are not also eligible for Child Tax Credit, which was claimed together with WTC), rates of non-take-up were estimated at around 50% of those eligible (Hoynes, Joyce, and Waters, 2024).

The main means-tested benefit for older people is Pension Credit. This has always had relatively low rates of take-up, with understanding about specific eligibility criteria being low among the targeted population (DWP, 2026). In the financial year ending (FYE) 2024, an estimated 62% of those entitled to Pension Credit claimed the benefit (DWP, 2025). This implies that up to 910,000 families entitled to Pension Credit did not claim it in 2024, representing up to £2.5 billion of unclaimed benefits. Pension Credit has been the subject of take-up concern for some time and has been addressed in different ways. For instance, behavioural evidence from the Behavioural Insights Team's (2022) study in Northern Ireland finds that low take-up of Pension Credit is primarily driven by confusion about eligibility, and recommends using simple language and consistent messaging that stresses the ease of applying and the cumulative value of additional benefits.

Overall, benefit non-take-up is influenced by a complex interaction of informational, administrative, and social/psychological barriers. **Lack of information or awareness** is among the most important barriers. Hoynes, Joyce, and Waters (2024) highlight that a key reason for people not claiming benefits is a lack of information about available support or how to apply. This challenge was also identified by support organisations in our fieldwork. It is reinforced by the fact that assistance is typically offered to those who actively seek it or have already had some kind of connection with public services. The residents who may need support the most often do not come forward, and in many cases, local authorities have no information about them.

Administrative complexity also often hinders take-up, as found by the Welsh Government's Centre for Public Digital Services. Application forms can be inaccessible due to format limitations, language barriers, digital exclusion, or overly complex design, preventing many users - particularly disabled people, limited digital skills, or non-native

English speakers - from applying independently. Claimants frequently require support to navigate eligibility criteria and the application process, but insufficient staffing, disjointed procedures, poor data sharing, and inconsistent processes across local authorities often create a challenging and frustrating experience. In this regard, Hoynes, Joyce, and Waters (2024) also demonstrate in their synthesis of literature that cumbersome claiming processes can further discourage eligible individuals from applying or accessing their full benefits.

Support organisations also emphasised that the complexity of the benefits system represents a major barrier. This complexity exists both in the actual application process and in how the system is perceived by potential claimants. From a service design perspective, the process can involve multiple stages, detailed forms, and extensive evidence requirements, such as providing proof of income or medical information. These requirements can be overwhelming and may discourage individuals from starting or completing an application. In addition, the possibility of claims being refused and the prospect of navigating appeals processes can further deter engagement.

Both local authorities and support organisation representatives noted that perceived complexity can be just as significant as actual procedural complexity. Some individuals may decide not to pursue a claim because they assume the process will be too difficult or time-consuming, even if it is not. Time pressures can also act as a barrier, particularly for individuals balancing work, childcare, or other responsibilities.

On the other hand, support organisations highlighted several **structural and individual barriers** that can limit benefit take-up across Wales. Demographic and geographic factors were identified as particularly significant. Wales has an ageing population and a high proportion of rural communities, which can make accessing support more difficult. Older residents may have lower levels of digital confidence, may not have someone available to assist them with applications, or may face mobility and transport challenges that limit access to in-person services. Residents living in geographically remote areas may also face additional difficulties reaching advice providers or support services.

Lack of digital access was reported by support organisations as a significant barrier to benefit take-up. In parts of Wales, residents live in areas with limited connectivity, or "not spots," which restricts their ability to access online services. Even where connectivity exists, the cost of internet access or technology can be prohibitive for some individuals, limiting their ability to submit applications, provide evidence, or engage with support services.

In addition, **stigma** is often a determinant for uptake of entitlements. Davies, Evans, and Cross (2025) find that stigma can affect benefit claiming by causing people to delay applications or claim only as a last resort, to avoid negative stereotypes, and distance themselves from the label of "benefit claimant," increasing the risk of financial hardship. Hoynes, Joyce, and Waters (2024) note that there is limited quantitative evidence about whether stigma inhibits take-up or demonstrates that measures to address stigma can be powerful in increasing take-up; but that there is plenty of qualitative evidence that stigma exists, and this would be a problem whether or not it reduces take-up, since stigma is undesirable in and of itself.

Fear of stigma was identified as an important barrier by support and advice organisations. They report that some individuals worry about being judged for seeking financial support, which can discourage them from engaging with services. These challenges can be particularly pronounced for individuals with learning disabilities, mental health conditions, or autism, who may find standard application processes and information materials less accessible and more difficult to navigate.

While increasing awareness and improving communication can support take-up, the Centre for Public Digital Services and Davies, Evans, and Cross (2025) both underline that these measures alone are insufficient without addressing wider system design and accessibility challenges. They highlight the importance of adopting a human-centred approach to the system to ensure it is more flexible, accessible, and supportive for users.

4.2.   A typology of participating local authorities

Local authorities started the pilot with different levels of pre-existing capacity, expertise and, to some extent, goals, and have therefore also reached different stages of implementation. To guide the rest of the sections, we have developed a simple typology based on the local authorities we have engaged with throughout this project and information drawn from other data sources. The table in Figure 3 Table compares three types of LAs (Type A, B and C) across four stages: Onboarding, Use of LIFT, Campaigns, and Overall experience.

Figure 3: Differences in journeys across local authorities

Type of LAs	Stage			
	Onboarding	Use of LIFT	Campaigns	Overall experience
Type A	Complex and subject to delays	Limited by resource constraints	Subject to severe delays	High costs without observable benefits
Type B	Complex and subject to delays	LIFT is a helpful tool	Learning and improving	LIFT is helpful but more resources are needed to continue using it
Type C	Complex and subject to delays	LIFT is essential for Revs & Bens	Running campaigns	LIFT is key to advance their goals

Source: Alma Economics based on primary data collection

Type A includes local authorities that have required a significantly longer period to reach effective use of the LIFT platform compared to Types B and C. While they have been able to use the tool in the end, their pathway to reach functional and strategic use of the platform has been slower and more resource-intensive. This type consists of a small number of local authorities (N=2).

This type of local authority experienced complex or delayed onboarding processes, which constrained their early use of LIFT. As they moved into active use of LIFT, they encountered difficulties associated with internal organisational factors, where changes in leadership, ongoing internal discussions, or staff shortages hindered the optimal use of the platform and contributed to delays in data use and campaign execution. In some cases, data quality issues within the platform further slowed their ability to confidently launch campaigns. These combined factors meant that engagement with residents and campaign execution were delayed relative to other local authorities. Although these local authorities have begun implementing campaigns through LIFT towards the end of the pilot, they are still in the early stages of translating platform use into measurable outcomes.

Type B includes local authorities that have encountered challenges at first, but did unlock potential to use the tool effectively with the requisite time and resources (N=3). Their onboarding was also complex and subject to delays, but they eventually reached a stage where they could begin to engage with the tool. Their experience of using LIFT has been generally positive, and they describe it as helpful for identifying potential claimants. Nonetheless, they felt that achieving take-up requires additional complementary activities, further investment, and sustained staff work, which LIFT alone cannot address. Overall, their experience of the pilot has been constructive, although they note that despite LIFT being a useful tool, it is not a standalone solution, and its continued use would depend on whether the required investments are considered proportionate to the benefits.

Type C includes the local authorities for whom the pilot has gone particularly well. Although their onboarding was similarly complex and time-consuming, they managed to navigate it and moved into regular use of the tool (N=4). For these local authorities, LIFT is now viewed as an essential tool for identifying households eligible for benefits and other public services, particularly for Revenues and Benefits teams, and it is now embedded into their operational practices. This operational embedding sets them apart from other types of local authorities and underpins their willingness to continue using the tool. They run several campaigns and describe their overall experience as positive and see LIFT as key to achieving their goals. They are enthusiastic about continuing to use the tool, in some cases even in the absence of further Welsh Government funding.

Although we have classified all the local authorities we engaged with into these 3 types, it is likely that, with more time using the tool and more resources available, some will progress towards more effective use of it and therefore move into a different type.

4.3. Activities – Onboarding of the pilot

There are 3 key takeaways from the experience of onboarding into the pilot, primarily concerning the complexities of the data-sharing agreements required to start using the tool, the role of Policy in Practice during this phase, and the capacity building needed for setting up LIFT.

Data sharing agreements at the onset of the pilot were complex and subject to delays

At the beginning of the pilot, each local authority needed to share relevant administrative data with Policy in Practice. Two main processes had to be followed to achieve this. First,

local authorities had to navigate their internal data protection protocols with legal and IT teams in order to secure approval for data sharing. These approvals were generally complex and time-consuming due to a combination of historical and organisational factors. As local authorities are responsible for ensuring individual data protection, they often require sign-off from their Data Protection Officers for sharing information. Past data breaches had made local authorities cautious and risk-averse.

For example, a Type B council experienced delays while awaiting approval from its IT team. Meanwhile, staff changes within the legal team slowed progress, as the newly appointed officer had limited experience with data protection approvals. Once these approvals were obtained, internal teams were supportive, with the only remaining constraint being staff time to complete the necessary tasks. Difficulties in obtaining internal approval for data sharing were common across all types of local authorities, though the length of delays varied from around 3 to 6 months.

Once internal approval was achieved, local authorities had to submit data reuse forms to the Department for Work and Pensions (DWP) or HM Revenue and Customs (HMRC) to use the data of claimants. Many local authorities lacked internal expertise on data reuse processes and needed to coordinate multiple officers and staff to review and sign the necessary forms. Therefore, significant delays arose during onboarding, primarily due to internal information governance and data protection approval processes rather than technical barriers.

On average, it took local authorities almost 5 months to set up the tool and have it ready for use. In the fastest case, a local authority took 3 months to prepare internally and obtain approval for the reuse of data, while in cases with the most difficulties and delays, it took up to 6 months.

After obtaining internal and external approvals, some local authorities were not sure precisely what information/variables they were required to send, which meant that clarifications and sometimes multiple iterations were required, slowing down the process. This process delayed the use of LIFT as it required local authorities to identify the correct reports, unique identifiers, and alternative data sources. This example illustrates that the learning curve associated with the tool can be slow, with more efficient use often emerging only after teams have gained experience and confidence with the platform.

Several local authorities felt that more proactive centralised coordination and oversight, with a more direct supporting role from the Welsh Government, would have been welcome. Although the licence started in January 2025, no local authority was able to access the platform until several months later due to prolonged and uneven onboarding processes. As a result, authorities started using LIFT at different points—ranging from April to July 2025, according to their monitoring data—meaning none benefited from a full 12-month period of consistent data.

Regardless of the specific data analytics tool implemented by Welsh local authorities, any issues relating to data governance agreements will need to be addressed in order to enable data sharing with data analytics companies for the purpose of increasing benefit take-up.

Policy in Practice's support was key to successful onboarding

Throughout the onboarding of the pilot, Policy in Practice played a key supportive role to local authorities. Policy in Practice's willingness to engage directly and constantly with local authorities to solve issues with the platform and provide periodic communication was seen as very positive. This support was frequently mentioned as helpful in navigating the administrative and technical demands of onboarding and the course of the pilot in general.

Their prior experience working with other local authorities enabled them to effectively guide local authorities through the process, including providing webinars, Q&A sessions, templates, and hands-on support with data-sharing agreements. Positive feedback on the quality of support was reported by local authorities across different types, including Types A, B, and C.

Local authorities had to build internal capacity and reallocate resources to the pilot

Many local authorities needed to put new staffing arrangements in place to support the pilot. This included creating new posts, recruiting additional staff, reallocating existing staff or resources from other areas, and preparing or training teams to engage with the pilot effectively. These preparatory steps were necessary to ensure that the pilot could be implemented as intended, but in some cases, they further delayed successful delivery.

For example, some local authorities created a new post to take responsibility for using the dashboard, updating data, and undertaking analysis. This introduced additional costs and delays, as recruitment could involve drafting a job description, advertising the role, interviewing candidates, appointing a successful applicant, and waiting for them to complete their notice period. These burdens were often unexpected, as local authorities mentioned that they were initially not aware of the time/resources needed for the pilot.

4.4.   Activities – Identification of eligible non-claimants

Key takeaways regarding the use of the tool are related to its ability to fulfil its purpose, the inputs required for successful use, its primary applications, and its limitations. We also include comments on whether there is interest in developing a similar tool in-house within local authorities.

LIFT allows local authorities to track individuals and target outreach

In most cases, LIFT has been successful in supporting local authorities in several key areas, particularly in tracking potentially eligible individuals, targeting communication campaigns more effectively, and reducing the operational burden on Revenues and Benefits teams. This aligns with Edwards, Gillies, and Gorin's (2021) observation of the growing use of digital data collection and analysis, which enables local authorities to capture extensive information on individuals' characteristics, behaviours, and risks, thereby supporting more informed decision-making in resource allocation and policy development.

This stage is, however, where local authorities across types differ the most. A Type A local authority, for example, required substantially more time than others to reach a point where the platform could be used with confidence, as they encountered data quality issues, meaning they did not have enough trust in the results given by the tool to base operations

on it. Also, other local authorities saw the process hindered by internal capacity challenges. In contrast, Type C local authorities were able to quickly make regular use of the tool, integrating it into their routine operations and enabling them to consistently track individuals and target outreach effectively.

For those able to use the tool, teams consistently highlighted that LIFT solves a major gap in local data and reflects wider evidence on the role of integrated data systems in public services and local authorities. As the Ada Lovelace Institute (2024) argues, combining data across services into a single analytical platform can support earlier intervention, enable more holistic and preventative responses, and deliver significant efficiencies in staff time. In this sense, LIFT can be understood as an example of the kind of robust data infrastructure that is increasingly essential for local authorities to respond to an environment of growing complexity.

Before using LIFT, most local authorities reported not having a clear way to identify the specific households to target, which often led to sending letters to a much wider group or area, or not sending letters at all. For example, some local authorities reported that, due to the lack of detailed information on non-claimants, they were limiting their efforts to social media outreach. In the most successful cases, previously, they either relied on manual and time-consuming processes to identify eligible non-claimants or on assumptions. However, before the pilot, staff could only deal with simple data requests, as more detailed analysis took too much time and coordination with other teams, as a local authority reported. When looking at pilot-non-participating local authorities, one has reported that they had not undertaken any identification or targeting approaches at all. Nonetheless, there is a small sample of pilot-non-participating local authorities that decided to purchase LIFT on their own.

Overall, compared to the baseline scenario of no use of LIFT, local authorities participating in the pilot had the possibility to rely on evidence rather than on assumptions or time-consuming manual processes. In this sense, LIFT was helpful because it enabled them to conduct analyses they had not previously undertaken. In some specific cases, LIFT contributed to streamlining existing processes, making the ongoing identification of non-claimants more automated and more accurate than before. For example, having heat maps, filters and different disaggregation of data through LIFT helped local authorities prioritise areas with high levels of unmet needs. Also, a Type B local authority highlighted that LIFT helped them focus their efforts on the right households, improving targeting and outcomes.

Nonetheless, the tool's benefits can only be fully unlocked when sufficient capacity and resources are in place

Staff capacity is a critical factor in determining whether local authorities can make effective use of LIFT. In many cases, for example, local authorities had to reallocate and increase staff time and resources not only to prepare for and onboard the LIFT tool, but also to maintain it and keep it up to date for ongoing use. Keeping the LIFT tool up to date required regular data submissions, which take time to collect and prepare. In this sense, as reported, for the tool to be useful, it requires ongoing staff time, which is where many local authorities struggle, as they are often understaffed. In most cases, local authorities reported that they did not have any staff working full-time on LIFT and the resulting campaigns. In some

cases, they also did not have staff dedicated full-time to the goal of increasing take-up, or to the provision of welfare benefits in general.

Also, some local authorities reported inaccuracies in the data provided by LIFT and noted that staff needed to review and correct these issues. This aligns with evidence from Edwards, Gillies, and Gorin (2021), who discuss that data-driven tools are susceptible to inaccuracies, bias, and potentially discriminatory effects. They underscore that without the ability of staff to critically interrogate outputs, there is a risk that flawed or biased data could go unchallenged and influence decision-making.

Finally, local authorities highlighted that, while the tool could show gaps in benefit take-up, it does not replace the work required to follow up with households to address this problem. For some local authorities, impact depended heavily on their own capacity to undertake the necessary follow-up work, including contacting residents and providing appropriate support. In this sense, for LIFT to be useful for the purpose of increasing take-up, local authorities needed to dedicate staff to work with the tool, but also to run campaigns and engage with residents.

Most local authorities started by targeting eligible Pension Credit non-claimants

In terms of the policy priorities identified during early engagement with the tool, most local authorities began by focusing on Pension Credit. They first focused on this specific benefit for several reasons, including the high levels of unclaimed entitlements among older residents. Some local authorities also cited data quality as a reason for focusing on Pension Credit, with concerns about lower levels of accuracy in some of LIFT's figures relating to eligibility for education-related benefits. Once initial work on Pension Credit was underway, some local authorities expanded the use of the tool to target other benefits, including Attendance Allowance, Personal Independence Payment (PIP), Council Tax Reduction Scheme, and Housing Benefit for pensioners (working-age individuals no longer receive Housing Benefit, since it is integrated within UC).

In some cases, local authorities reported using LIFT more expansively to connect residents with a wider range of support services. For example, some local authorities used the platform to share information with specific households, including Welsh Water information sessions, financial resilience initiatives offering money advice and energy support, or increasing awareness of participation in free activities. Also, one local authority used data from LIFT to reach out to people with health conditions or impairments, aiming to introduce early, light-touch conversations about wellbeing and potential pathways back into work. Similarly, other local authorities used LIFT for the purposes of employability workshops. This progression reflects a learning curve in which LIFT often became embedded in day-to-day practice, internal capacity began to grow, and LIFT was used to support a wider range of interventions.

LIFT has limitations, such as data inaccuracies or limited coverage

Some local authorities reported a misalignment between the scale of expectations and the reality of the tool, even while still, in many cases, finding it very valuable. For example, some local authorities highlighted that figures initially shared by Policy in Practice suggested that more than 2,000 pensioners were missing out on Pension Credit in the area. On this

basis, a local authority prioritised pensioners and expected to receive a large list of households for outreach. However, when the first dataset was delivered, it identified around 150–180 potential cases. A similar issue arose with UC-eligible non-claimants, where a local authority reported that thousands of cases were initially suggested by Policy in Practice/LIFT, but just over 100 were identified in practice.

This created challenges in managing expectations, as councillors had expected outreach to several hundred households and a significant impact on local incomes. However, local authorities acknowledged that, while the numbers were far lower than expected, the tool still helped focus attention on key groups. LIFT brought together data that local authorities would not have had the capacity to create manually.

Given the inherent limitations of administrative data and the need to make assumptions, some degree of inaccuracy in predicting eligible non-recipients is virtually inevitable, and we observed a range of experiences across local authorities in terms of how prohibitive these inaccuracies were in practice. One local authority reported that it had found data imperfections to be a significant barrier to reliable, confident use of the tool. It had identified people as eligible non-recipients for benefits such as Attendance Allowance or Pension Credit when they were already in receipt of those benefits, or when they were not eligible, for example, because someone was claiming Carer's Allowance on their behalf. As a result, the council felt that it could not confidently use the lists provided, as contacting these residents would have been inappropriate and misleading. To address this, the authority needed to revalidate the data, cross-check it against additional databases, and reconcile discrepancies to generate a more accurate and reliable dataset, and only then move forward to conducting campaigns.

Additionally, the tool's sample is limited to beneficiaries of Housing Benefit, Council Tax Reduction Scheme, and UC. This means it cannot identify individuals who are not claiming any benefits at all, leaving a portion of the eligible population outside the tool's scope. Policy in Practice is developing a model to include other sources, but they have not finalised it yet.

The potential for developing and implementing an analytical tool like LIFT internally

The pilot has increased awareness of the potential value of data-led approaches, and some local authorities have considered whether LIFT is the only way to identify eligible individuals who are missing out on benefits. This has prompted reflection on whether similar analysis could be undertaken internally or in collaboration with DWP in the future.

However, local authorities recognised that developing a comprehensive in-house tool would require substantially more time and resources than using LIFT. Many concluded that, when weighing council capacity against the cost of the platform, LIFT represents a more practical and proportionate option. While local authorities could develop more limited tools using their own data and expertise, doing so would require close coordination with other teams, particularly IT, whose competing priorities make this both difficult and resource-intensive.

For example, a Type A local authority reported that, as a small team of just two people, the platform had become additional work, and an internally developed tool would require even more work. A Type B council was exploring whether some of LIFT's functionality could be

replicated internally, though it was unlikely to be as comprehensive. On the other hand, a Type C local authority highlighted that, aside from the upfront cost of developing an in-house tool, maintaining a newly designed system would require ongoing resources, in addition to the resources needed for its use. Monthly data updates demand dedicated staff to keep the system up-to-date and robust. Without these resources, the local authority cannot replicate the system internally, nor fully leverage the insights LIFT provides, despite its potential to generate significant financial gains relative to its cost.

Some local authorities, however, think that even though LIFT is useful, they have concerns about its cost and whether it delivers meaningful impact beyond organising existing data. They think that certain upskilling of staff using data and spreadsheets can save costs and have similar data analysis as the one obtained through LIFT. Nonetheless, they have not started actions in this regard.

Therefore, despite the interest, developing and managing such a tool internally was not currently being actively pursued by local authorities, largely due to capacity and resource constraints. In this context, LIFT is viewed as offering a more practical balance between cost, expertise, and resource requirements than building or managing the process in-house. As a result, several local authorities indicated that, if financial resources were found, they would choose to purchase a LIFT licence again. The choice they are making is generally between repurchasing LIFT and not, rather than developing their own in-house version. For instance, with the pilot running until March, a Type C local authority started to build a strong business case for the Head of Service so that funding for LIFT can be discussed.

4.5. Outputs – Communication campaigns

Although not all local authorities managed to conduct communication campaigns and see their results by the time of writing this report, most of them did. Below, we summarise some of the learning.

The onboarding process was subject to delays, leaving little time to conduct and improve communication campaigns

Local authorities highlighted that a significant amount of time was spent sorting out the process to use the system, which reduced the time to fully use LIFT. As a result, most campaigns were only launched in the second half of the pilot period, constraining the impact of the campaigns. That said, most of them underscored that the campaigns they had launched helped them understand the potential of the tool. Some reported an increase in the number of households reached out to through communications campaigns, demonstrating the potential of the platform to extend outreach.

Experiences varied regarding the pilot extension. While most local authorities did not plan to launch additional campaigns, a few intended to use the remaining weeks to run one final campaign, aiming to maximise the benefits of the LIFT platform before the pilot concludes.

Approach, design, and content

Local authorities reported sending targeted **letters** as their main engagement approach. The recipients of letters were selected based on the households identified using the LIFT platform and on policy priorities. Local authorities reported having access to templates from previous campaigns, as well as templates shared by Policy in Practice, which helped them to prepare the materials to be sent out. Each local authority adapted these materials to align with their own council branding, formats, and visual identity.

Local authorities paid close attention to how to design the letters, aiming to maximise residents' response rates. Generally, they were no more than 2 pages long, used direct and clear language, and were written in both English and Welsh. To reduce anxiety and mistrust from recipients, one local authority mentioned they avoided brown envelopes—often associated with debt—and instead used white envelopes and included council branding to reassure recipients that communications are genuine. They were even considering using postcards in the future, which would present the information directly rather than leaving recipients to decide whether to open an envelope.

As part of this approach, the letters typically included direct phone numbers for applications, enquiries, or guidance on the process. In this way, they encouraged recipients to contact the local authority or relevant support organisations to obtain further information, either via a website or by telephone. In some specific cases, particularly for Free School Meals (FSM), letters also included QR codes and links to webpages where recipients could access additional information.

Some local authorities reported taking additional follow-up actions alongside letter campaigns. Recognising that residents may suspect potential scams or may be busy when they receive the letter, these local authorities supplemented letters with **phone calls and text messages**. The aim of these follow-up actions was to draw attention to the letter, explain the claiming process, and, where appropriate, arrange home visits, which in some cases led to face-to-face support. These complementary actions were typically undertaken 2 to 3 weeks after the letters were sent. Local authorities also noted that using multiple communication channels was more effective in increasing benefit take-up, although they acknowledged that this approach is more resource-intensive in terms of time, staff, and financial costs.

Some local authorities reported **face-to-face engagement** as the most effective way to build trust and increase benefit take-up. Meeting residents in person and taking time to talk through their circumstances helps increase trust and encourages individuals to begin the claiming process. However, local authorities acknowledged that household visits are not always feasible and depend on factors such as team capacity and the geographic size of the area covered.

It is important to note that local authorities complemented targeted campaigns with wider campaigns. The most common additional action was the use of **social media or offline advertising** (for example, bus stop advertising) to reinforce the message and extend the reach of the letters. As one local authority explained, this type of advertising was intended to

support the letter by increasing recognition and trust: a potential claimant receives the letter, sees the advert, and is therefore more likely to believe the communication is legitimate and decides to contact the local authority.

Local authorities noted that **smaller, more targeted campaigns** can be more effective, as they allow for more personalised support, including follow-up phone calls and tailored guidance, rather than large-scale letter campaigns. In addition to being less personal, mass mailouts can become expensive, as letter-sending expenses increase rapidly with volume.

Lastly, while LIFT has enabled local authorities to identify potential claimants more effectively, communication with residents must be carefully planned. This includes not only the design and content of letters, but also the **frequency and volume of communications**. Local authorities emphasised the importance of avoiding overwhelming residents, as trust can be fragile. They warned that repeated outreach could lead to "letter fatigue," where excessive or repeated communications may cause confusion, reduce credibility, or increase residents' vulnerability to scams if they are unsure which messages are legitimate. Some local authorities, for example, reported that residents occasionally requested to be removed from mailing lists. This is not always due to a lack of awareness or interest in claiming benefits, but rather possibly related to letter fatigue. In this sense, letters can have the opposite effect of what is intended because, as we have learnt over the engagement, some recipients of letters reported being anxious about the letter, fearing they would be forced into work or risk losing their benefits.

The role of support organisations and other frontline teams

Local authorities reported working closely with support organisations to help increase benefit take-up, with Citizens Advice identified as a key partner in supporting residents throughout the claiming process. Many local authorities included Citizens Advice contact details in campaign letters, providing an additional source of information and guidance for potential claimants. Citizens Advice supports residents through telephone advice and face-to-face appointments at local offices, helping individuals understand their eligibility and complete applications.

A support organisation representative noted potential claimants to be initially sceptical of the letters and suspected them to be scams. In this context, the phone calls or face-to-face appointments gave additional reassurance to households, meaning that verbal engagement was often required before individuals felt confident to pursue a claim. As one local authority noted, in some cases, residents made a phone call to speak directly with a staff member of a council or a support organisation in order to verify the authenticity of the letter, indicating that while the letters prompted caution, they were also effective in encouraging proactive engagement.

Conversations with claimants typically emphasised clear next steps, helping them navigate the support available and understand how to access further assistance if needed. Then, they typically reported to local authorities the number of individuals who had made contact and successfully began the claiming process. Local authorities then monitored outcomes

using identification codes, which allowed them to track engagement and match activity to internal systems.

Support organisations noted that engagement approaches can differ significantly between urban and rural areas. Strategies that rely on in-person services or high-volume outreach may be more challenging to implement in rural settings due to geographical and accessibility barriers. In addition, they highlighted that demand for advice often exceeds the capacity of their services. As a result, potential claimants who attempt to seek support may not be able to access advice promptly. This delay can discourage engagement and, in some cases, lead potential claimants to abandon their intention to begin the claims process.

Local authorities reported that data protection and data-sharing restrictions were often counterproductive. In some cases, data protection constraints prevented local authorities from fully involving partners or other internal teams in outreach activities. For example, Citizens Advice staff were often unable to contact potential claimants directly, such as via phone calls, due to data protection legislation restricting the local authority from sharing phone numbers with them (without the necessary data governance arrangements). Instead, Citizen Advice provided training to local authority staff, who then carried out the calls. This is costly for local authorities, as staff typically have competing priorities, and holding the phone calls themselves potentially reduced the capacity to conduct other outreach and follow-up activities. Many local authorities reported that they did not have sufficient staffing to dedicate personnel full-time to benefit take-up campaigns, which can limit the scale and effectiveness of their efforts.

In addition to supporting take-up campaigns, Citizens Advice delivers services through national and regional programmes, including the National Advice Programme and the Welsh Government's income maximisation scheme, "Claim What's Yours," which can be considered a complement to the LIFT campaigns. These initiatives aim to help clients maximise their income through holistic support, addressing not only welfare benefit entitlement but also related issues, such as debt, budgeting, and financial resilience.

4.6.   Impacts – Take-up and others

Documented evidence shows that letters are effective but insufficient on their own to drive large changes in uptake

In the campaigns rolled out during the pilot, local authorities most commonly described using bilingual letters based on a template provided by Policy in Practice. They paid careful attention to tone and presentation, with letters being kept short, avoiding overpromising, and using encouraging language. This approach reflects behavioural evidence from the Behavioural Insights Team's (2022) study in Northern Ireland, which finds that low take-up of Pension Credit is primarily driven by confusion about eligibility, and recommends using simple language and consistent messaging that stresses the ease of applying and the cumulative value of additional benefits.

Because these methods–sending letters, especially to Pension Credit recipients–are methods for increasing take-up that have been tried in other contexts, there is an existing evidence base on their likely efficacy. Hence, we can draw on insights from that highly related evidence from similar contexts, in conjunction with our own primary data collection.

Evidence from a test-and-learn exercise by the DWP (2023) supports the use of letters as an effective primary intervention when they are well-targeted with the help of high-quality administrative data. In the study, DWP concluded that using Housing Benefit data to identify likely non-claimants and sending "Invitation to Claim" letters made households around 6 times more likely to make a successful Pension Credit claim than those in control groups–27.5% of those to whom they wrote letters subsequently made a claim within 4 months, compared to only 4.6% of a comparable control group, implying that a little over 20% of those sent letters subsequently made a claim who would not otherwise have done so. This demonstrates the potential value of data-led letter campaigns. One additional lesson from this DWP work is the importance of accurate information on who is likely to be eligible in the first place, so that communications are well-targeted. In an initial iteration of DWP's work, before they refined the identification of eligible non-recipients, a large fraction of those to whom they sent letters were, in fact, ineligible for Pension Credit.

In the LIFT pilot, some local authorities also reported using leaflets with QR codes, phone calls, or home visits as additional strategies, although these come at a higher cost and are less common.

Welsh Government and delivery stakeholders noted that the campaigns helped address the lack of awareness. Hoynes, Joyce, and Waters (2024) describe research that shows sending informational letters can lead to (modest) increases in take-up by correcting false beliefs about entitlement. However, the authors found that the impact of information interventions is uneven. Evidence suggests they are less effective for low-income households that are weakly connected to government systems, while individuals already engaging with public services are more likely to respond positively. Combining clear information with practical assistance—such as help completing forms or navigating application processes—has a substantially stronger effect on claiming entitlement. This was observed during the pilot, as local authorities frequently highlighted Citizens Advice's support, which, based on the evidence we gathered, proved to be very important for the claiming process (as discussed in the previous section).

Evidence from the testing of letters sent by the HMRC to individuals identified as potentially missing Home Responsibilities Protection between 2023 and 2024 (Heppel and Brown, 2025) shows that low take-up is not primarily driven by lack of information, but by barriers to engagement and action. Key challenges included low trust in official communications, fear of scams, limited digital skills, and poor understanding of how the benefit related to historic circumstances. Many recipients did not fully engage with the letters, assumed they were not relevant, or relied on their own (often incorrect) assessments of eligibility. Uncertainty about potential gains and concerns about perceived risks further reduced the likelihood of applying.

The findings of the HMRC research [(Heppel and Brown, 2025)](#) suggest that while data-led identification is a strong foundation for improving take-up, letters alone are unlikely to be sufficient for groups facing multiple and overlapping barriers. The effectiveness of analytical targeting depends on being complemented by clear, trusted communications and accessible support routes, particularly for older and more digitally excluded populations, as it might be in this case, since Pension Credit was the most targeted benefit.

There have been increases in awards and financial gains across local authorities

Campaign outcomes have varied across local authorities, with some local authorities only in the initial stages of outreach to households (Type A and some Type B), while others made it to the point of conducting campaigns and observing increases in contacts or awards (some Type B and Type C). This section focuses on the results reported by the latter.

The impact figures found below, as reported by local authorities, were linked back by local authorities to communication campaigns using different approaches. Some local authorities associated awards with their campaigns based on the timing of the claims and awards. From the point at which local authorities first reached out to households to the moment a benefit was awarded, the journey was often lengthy. Based on local authority reports and analysis of secondary data, there was, on average, a 3- to 4-month lag in between. This estimate helped local authorities trace subsequent spikes in claims and awards back to specific campaigns.

Some local authorities instead tried to link new claims to their communications campaigns through a more manual process, with staff following up on individual cases or relying on information from partner organisations. Examples of manual methods for tracking outcomes highlighted by local authorities include:

- close collaboration with external partners, such as Citizens Advice, to support campaign delivery and monitoring

- follow-up telephone calls to assess campaign outcomes, although this approach is resource-intensive, time-consuming, and slow

- door-to-door visits, with one local authority noting that a full-time staff member conducted visits to 100 households to check benefit claims, resulting in 24 households claiming new benefits

Although LIFT's Outcome Tracker was mentioned as a tool to monitor contacted households, several local authorities highlighted that the platform needs improvement in tracking the results of campaigns. In its current format, local authorities report it is challenging to determine what has been achieved and whether those results can be attributed to LIFT. They find that the reports of the campaign results are high-level and lack clear attribution to campaigns. In sum, the reported results were linked by local authorities to the use of LIFT and the subsequent communication campaigns, but the level of confidence in attributing the outcomes to the campaigns varied across local authorities.

The first and main targeted benefit was Pension Credit. This was often complemented with campaigns targeted at Attendance Allowance, PIP, and Housing Benefit for pensioners. Local authorities decided to reach out to a small, targeted group of non-claimants—typically between 100 and 250 households each—prioritising residents they were confident were truly eligible, thereby increasing the likelihood of higher response rates. On average, based on what local authorities told us, approximately 15% of those contacted by letter, text message, and/or phone call ended up being awarded an entitlement to the targeted benefit following the campaign. Given the number of letters they typically sent out, this would imply that local authorities conducting targeted communication campaigns saw, on average, about 20 awards after each campaign.

For Pension Credit, for example, most local authorities reported a range of 5 to 30 awards following a campaign, typically involving letters and sometimes complemented by text messages and phone calls. Each of these awards had a meaningful impact on households' income, with an average annualised financial gain of £3,800, based on local authority reports in the Phase 2 interviews. Altogether, on average, this amounted to approximately an additional £60,000 in annualised Pension Credit awards per local authority. Similarly, local authorities targeting households eligible for Attendance Allowance reported a range from 5 to 40 new awards following the campaigns. The associated annualised financial gains were, on average, reported by local authorities at approximately £4,500, also adding up to around £60,000 (annualised) at the local authority level. Fewer PIPs were awarded (up to 15), but at higher average values (annualised £7,000). All of these numbers were drawn from our engagement with local authorities, and reflect their estimates based on the range of techniques described above for attributing claims to campaigns.

The total annualised financial gains to household incomes in local authorities that conducted targeted campaigns averaged roughly £200,000, taking together all benefit campaigns flowing from the LIFT trial. This is an average over all the participating local authorities that we spoke to that did run campaigns as a result of LIFT (i.e., not including local authorities that never got to that stage or did not have numbers to report).

On the other hand, local authorities often reported that without the tool, teams would not have known how to target effectively and would have had to send letters to a much wider audience, which would have been a waste of resources. In this way, the LIFT tool has proven helpful in making communication campaigns more targeted, reducing the need for broad mailings and reducing reliance on other teams, such as IT, or on manual efforts.

In addition, it is likely that the effectiveness of LIFT as a tool would increase over time, as local authorities feel they have learnt about how best to use it and can now benefit from those learnings. Relatedly, they have now incurred many of the upfront costs of time and effort needed to use the tool effectively.

Despite the gains in take-up, these are unlikely to have had a discernible impact at an aggregate level

Pension Credit claims and awards data, most recently published by DWP for the period up to mid-November 2025, show weekly claims and awards at the local authority level. As Pension Credit was the most commonly targeted benefit by local authorities participating in the LIFT pilot, and as the data allow us to track claims and awards by local authority until almost the end of 2025, we have analysed these data to help build a further picture of the likely contribution of the pilot to higher take-up.

Figure 4 shows claims and awards of Pension Credit in Wales from early 2023 to November 2025. It shows that there was a peak in claims in September 2024, followed by a peak in awards in January 2025. The size of this lag between claims and awards is consistent with the information collected from the stakeholder engagement. The trends in the national-level figures are similar to those in England, in both cases most likely driven by the policy context. In summer 2024, the government announced that it would restrict winter fuel payments to people on Pension Credit. This created an additional incentive to claim Pension Credit. The policy was, in the end, not implemented, but it led to more awareness of Pension Credit eligibility and, it seems, an increase in claims both in England and Wales. Therefore, these peaks are not to be attributed to the pilot, which only commenced in January 2025.

Figure 4. Pension Credit claims and awards, Wales
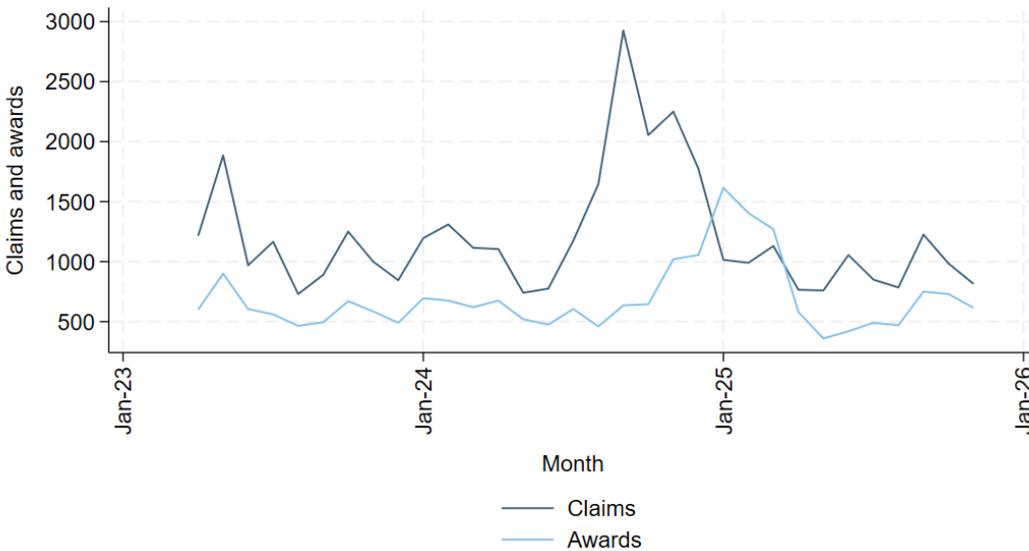
Description of figure 4: a line chart showing two lines for 'claims' and 'awards'. The 'claims' line spikes to almost 300 in mid-2024, and 'awards' has a smaller spike in January 2025.

Source: Alma Economics, based on Pension Credit data published by DWP

Figures 5 and 6 present Pension Credit claims and awards, respectively, for participating and non-participating local authorities. They show that trends in claims and awards move quite similarly across participating and non-participating local authorities. Therefore, as of November 2025, LIFT was unlikely to have had a large proportional impact at the aggregate level on take-up in participating local authorities (yet, at least). If it had, we would expect to see more evidence of this in the Figures. Recall that 2/3 of those eligible for Pension Credit

do already claim it. Hence, if take-up were increased to its theoretical maximum (i.e., 100%), this would increase the numbers in the figures by approximately 50% (this is not a realistic scenario, but a way of getting a sense of scale when looking at the Figures).

The figures align with what local authorities told us. On average, around 30–35 new Pension Credit awards are made each month in a typical local authority. From our stakeholder engagement, local authorities estimated that a LIFT-based campaign resulted in around 20 additional awards, noting that Pension Credit campaigns were not run every month. This means that, for authorities running only one campaign, the impact represents a one-off increase of about 20 awards compared with roughly 400 new awards made across 2025. Even where more than one campaign was delivered, these numbers suggest that the overall proportional effect on annual awards is likely to be modest.

Figure 5. Pension Credit claims, by pilot participation
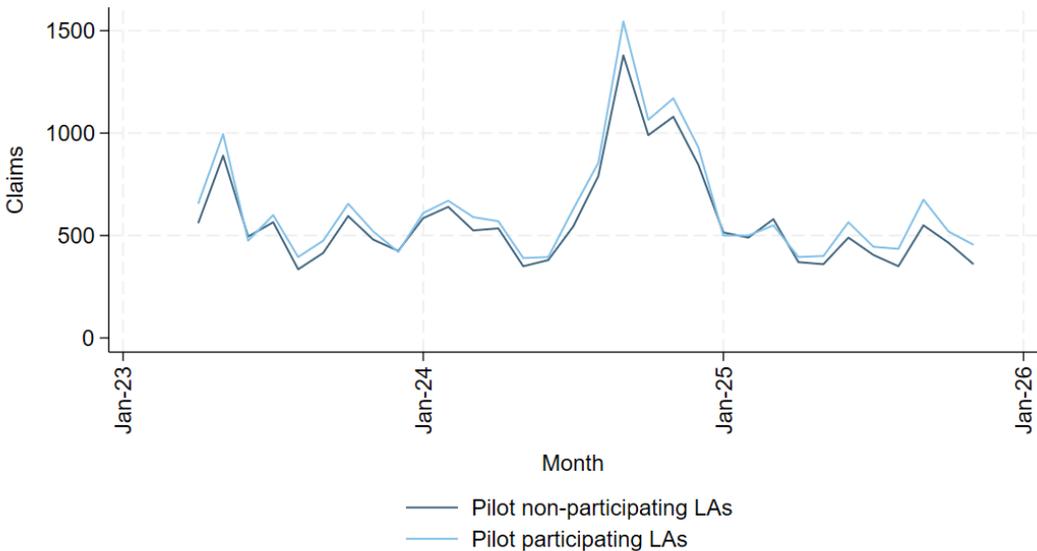
Description of figure 5: a line chart showing a mostly consistent trend for claims made by 'pilot non-participating LAs' and 'pilot participating LAs'. Both of these lines spike in the middle of 2024, reaching around 1500 claims.

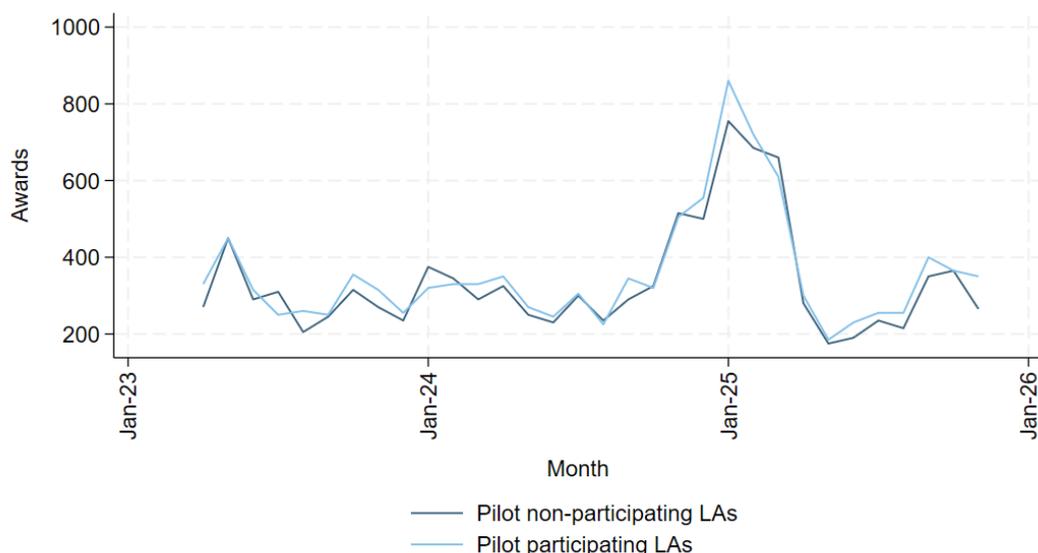Source: Alma Economics, based on Pension Credit data published by DWP

Figure 6. Pension Credit awards, by pilot participation

Description of figure 6: a line chart showing a mostly consistent trend for awards given to 'pilot non-participating LAs' and 'pilot participating LAs'. Both of these lines spike in January 2025, reaching around 800 rewards.

Source: Alma Economics, based on Pension Credit data published by DWP

A few important points are worth noting alongside this, for context. In our engagement, local authorities often still considered the increases in take-up achieved to be a success. To say that the changes have not yet been large at an aggregate level is not to say that the intervention was not worthwhile (which would require a systematic cost-benefit analysis). In addition, impacts may not yet have fully materialised, with some results from campaigns taking longer to translate into claims. Finally, as covered elsewhere in this report, there have been investments and learning from the pilot that could have longer-term benefits, both for increasing entitlement take-up and other outcomes.

Ultimately, benefits play a central role in reducing poverty and deprivation by directly increasing household incomes and protecting individuals from adverse economic shocks. However, their effects or rationales can extend beyond this, by promoting fairness, equity, and inclusivity between households with different needs–such as those of disabled people or children–and improving longer-term life chances, particularly for children. By easing financial pressure, welfare benefits can improve material living standards and contribute to better wellbeing through reduced stress, greater financial security, and increased ability to meet essential needs, such as housing, nutrition, and healthcare. These sorts of effects would generally be expected to follow from increases in take-up, although the impacts on longer-term life chances are more limited when pensioners are targeted (as has often been the case in the pilot, though not as a general rule). These and further points have been discussed more fully in the Deaton Review of Inequalities (Hoynes, Joyce, and Waters, 2024).

Learning and knowledge sharing emerged as a key added benefit

An indirect outcome of the pilot was the formation of a community of practice among participating local authorities. Bi-monthly programme and best practice meetings, led by

Welsh Government and Policy in Practice, allowed local authorities to have a forum with peers to share strategies, compare approaches, and learn from each other's experiences. For example, one local authority highlighted that they had learnt from discussions, including when door-to-door outreach has proved more effective than letters, and the use of certain language or design in the letters sent by other local authorities. Another local authority mentioned that it was keen to learn about campaigns aimed at increasing Healthy Start uptake, as it would like to pursue this in the future. It also noted that the bi-monthly programme and best practice meetings provided a valuable opportunity to learn from other local authorities in this regard. On the other hand, a number of local authorities have learnt a lot about the value of data in helping to focus take-up efforts, and they also feel they have learnt specifically about the LIFT platform, which they could build on in the future.

5.   Case Studies

In this chapter, we present 3 case studies highlighting key findings and lessons from 3 different types of local authority experiences with the LIFT pilot. We first include a case study for a Type A local authority—those that experienced the greatest difficulties in implementing and making effective use of the tool. Then we present a case study of a Type B local authority—those that were able to use the tool and conduct campaigns but faced capacity constraints, leading them to report that continued use would depend on whether the required investments are proportionate to the benefits. Finally, we present a Type C case study, representing local authorities that had a very positive experience with the platform and are keen to continue using it.

5.1.   Case study A

The Type A case study is structured around 2 examples within the same type of local authority. While both examples shared similar experiences during the onboarding stage and reported broadly comparable overall reflections on the pilot, they differed with respect to the main bottlenecks that they experienced. Presenting these examples side by side helps to illustrate how certain factors can influence implementation and outcomes. Moreover, it is worth noting that Type A local authorities are the smallest in number, and that the more time they have available to learn, the more likely they are to transition into Type B local authorities.

Onboarding

Both our Type A case studies experienced challenges related to internal information governance requirements during the onboarding phase of the pilot. These challenges were twofold. Firstly, they did not have a dedicated officer responsible for overseeing governance processes, which necessitated the reallocation or recruitment of staff. Secondly, meeting the IT and legislative requirements necessary to access and use the data required coordination across multiple internal teams, which took longer than anticipated. This was largely due to limited prior experience of managing such processes, both within the team responsible for LIFT and across the local authority. For both local authorities, the onboarding meeting with Policy in Practice, which generally only happened once the data agreements were in place, occurred in June 2025, almost 6 months after the pilot had begun.

Use of LIFT

The implementation stage is where the 2 Type A local authority case studies diverged slightly.

Example 1: They identified inaccuracies in the data extracted from LIFT, mainly relating to potential Attendance Allowance and Pension Credit claimants. In particular, they found that a significant proportion of individuals identified were either already receiving the benefits or were ineligible. To improve the platform's accuracy, the local authority's team responsible for LIFT provided additional datasets, but data concerns persisted for some time, limiting this local authority's use of the tool. Meanwhile, staff continued to rely on manual data analysis using internal systems, which they found more reliable, although significantly

slower. They are a team of 2 officers, and the additional work required to verify and correct LIFT outputs increased workload pressures rather than reducing them.

Example 2: Internal organisational challenges limited the use of LIFT. The team underwent restructuring and is relatively small, with staff who have access to the platform also responsible for other, higher-priority duties, meaning they were unable to work on LIFT full-time. In addition, periods of reduced staffing due to annual leave and sickness absence further restricted the team's capacity, resulting in times when the platform was not actively used.

Campaigns

Example 1: Due to the data quality challenges, this LA launched a LIFT-based campaign only in early January of 2026. In other words, without the extension of the pilot, they would have been unlikely to be able to see the impacts. Staff highlighted that inaccurate claimant identification delayed outreach, as contacting individuals who were already receiving benefits or were not eligible could undermine trust and create confusion.

Example 2: Due to time constraints and a shortage of staff, it was not until mid-December 2025 that the first campaign for Pension Credit was launched.

Overall experience

Our Type A case studies reported a frustrating initial experience with LIFT, largely due to delays in accessing and validating information and the time required to understand how to use the platform effectively. The steep learning curve meant that significant staff effort was needed before the tool could be used with confidence, which limited the immediate value they were able to derive during the pilot period.

However, as these issues were gradually resolved and familiarity with the platform increased, their experience became more positive and frustration reduced. By the time they were able to use LIFT more effectively, the pilot period was nearing its end. They therefore felt that a longer implementation window would likely have enabled more meaningful results. Their classification as Type A reflects the extended time required to reach confident and effective use of the platform, which hindered timely use and decision-making, rather than an inability to use it.

5.2. Case study B

Onboarding

Our Type B case study experienced a complex onboarding process subject to delays before being able to start using LIFT. In this sense, their initial experience shared some features with the Type A experience. Delays came from securing data-sharing approvals, with internal IT and information governance requirements being the main bottlenecks. Onboarding formally began in June 2025. Despite the delays, however, the local authority described the onboarding experience itself as positive, highlighting the support provided by Policy in Practice.

Use of LIFT

Our Type B case study reported that the LIFT platform comes with a steep learning curve, but that once staff became familiar with its functionality, they were able to extract the information they needed effectively (and this was achieved earlier than in Type A local authorities). They emphasised that the main challenge is not the platform itself, but the capacity required to engage households and to determine the most appropriate ways to contact them. While LIFT is valuable for identifying potential beneficiaries, its impact depends on having sufficient skills, resources, and a dedicated team to manage the full process, from data analysis and communication design to delivering advice and supporting customers to begin a claim. Hence, realising the full potential of LIFT requires other things, besides the platform, to work well and to be sufficiently resourced.

Using LIFT enabled the local authority to explore the data in more depth and generate ideas for potential campaigns. It also helped identify opportunities for potential collaborations with other teams within the local authority, where shared data insights could support joint or complementary work.

The local authority also acknowledged that LIFT enables the identification of a larger number of households, but noted that the data is based on multiple assumptions and it can only yield insights on those who are already claiming benefits of some kind, since this is what the data used by the platform is based on. While this does not necessarily make the data inaccurate, they observed that it does not help them identify people who are not currently in the system at all. The dashboard does allow for interrogation of the current caseload in much greater depth, but it does not solve the problem of reaching households that are not already claiming any of the relevant benefits. That remains a major challenge for local authorities and leaves a gap in identifying and supporting those people.

Campaigns

The Type B local authority has engaged in more than one campaign for different benefits, including Pension Credit, Attendance Allowance, and FSM. They do not have dedicated full-time staff for LIFT and conducting campaigns, so the frequency and size of the campaigns depend on the availability of staff and the type of campaign. For them, the mass mail-out campaigns based on broad targeting tend to generate relatively low levels of response and take-up. They prefer to do smaller, more tailored campaigns, where they can direct time and resources to a more personalised and impactful engagement. For example, a mass campaign had minimal take-up, while a smaller, more personalised campaign, often involving phone calls or home visits, was felt to have generated greater impact.

Recording outcomes remains largely a manual process for the Type B local authority. This means that follow-up and measurement rely on staff reviewing individual cases and recording updates manually, which is time-consuming and difficult to sustain. To date, the only information on outcomes originates from staff feedback rather than LIFT. Although Policy in Practice has demonstrated the intended functionality of the tracker and its potential, it has not yet delivered practical results for this local authority.

Overall experience

Type B local authority has had a positive experience with LIFT overall. They were able to use the platform to extract valuable information that supported the planning and delivery of campaigns, providing new insights and opportunities for impact. However, they felt it possible that similar outcomes might ultimately be achievable in other ways, such as internally analysing the data that local authorities already have. Another limitation was time, as the local authority did not have access to use LIFT until July 2025, leaving only a short window to work with the system. A lack of full-time staff dedicated to the project also limited the speedy integration of LIFT into day-to-day work.

5.3.   Case study C

Onboarding

The Type C local authority experienced a relatively rapid approval process, both internally and with external organisations, to enable the reuse of data. All key arrangements were put in place within the first 3 months of the pilot, allowing the local authority to begin using the platform and planning its first campaigns by April/May 2025. Having previously delivered benefit take-up campaigns, this local authority was already familiar with data requirements, IT reporting processes, and data reuse documentation, which significantly eased the setup phase. Still, there were some challenges during onboarding around securing internal IT and legal approvals, but Policy in Practice provided substantial support, including templates, guidance, advice, and regular communication, which helped facilitate a smoother onboarding experience.

Use of LIFT

Our Type C case study reported that the use of the dashboard is straightforward and intuitive, with filters that initially seemed complex but quickly became easy to use. Once staff became familiar with its functionality, it enabled multiple analyses that would previously have been too resource-intensive to undertake. The platform broke down the barriers by offering extensive filtering and demographic breakdowns that internal teams would not realistically have been able to produce on their own.

As their confidence in using the platform grew, the Type C local authority discovered additional features that allowed analysis at the street, household, and individual levels. This expanded their understanding of the platform's potential beyond benefit take-up campaigns. As a result, they organised working sessions with other service areas within the local authority, including education, employment, and housing teams, to explore wider applications of the data.

Campaigns

The Type C local authority has been able to do campaigns for various benefits, including Pension Credit, Attendance Allowance, PIP, Housing Benefit, and Council tax reduction. This allowed them to reach more households than they had reached before.

LIFT has streamlined the process of analysing data, coordinating letters, and managing complementary follow-up campaign actions, such as text messages or phone calls. The staff can now analyse campaigns, track individuals, and download reference numbers directly. This has significantly reduced reliance on other teams and increased efficiency.

A key lesson from their experience was that identification of target households is only the first step in the process. Complementing letter campaigns does come with a cost. Local authorities need an in-house budget to be able to follow up the letters with text messages, phone calls and relevant additional communications. Without these supporting actions, the potential impact of the platform is limited, highlighting the importance of embedding LIFT within wider operational processes and strategies.

Overall experience

The Type C local authority reported a positive experience with the LIFT platform, particularly in its ability to identify individuals who may be eligible for support or could benefit from targeted communication. They expressed a strong preference to continue using the platform and would advocate for its ongoing use.

Their highly positive experience of LIFT overall was related to their ability to use it early in the pilot after a smooth and speedy onboarding process. In turn, this seems related to this local authority's previous history of entitlement take-up campaigns and relative familiarity with navigating some of the data governance issues. Overall, this case study and its contrast to other case studies emphasise that the power of tools such as LIFT is greatly enhanced when it is complemented by sufficient staff capacity and skill sets, in using the data itself as well as acting on it. One positive possibility is that the experience gained from using LIFT will, in future, help to make more local authorities in Wales more like the Type C case study.

6. Conclusions and lessons learnt

Local authorities have progressed through the LIFT pilot in diverse ways, starting from different points and reaching different stages of implementation. The onboarding process highlighted the importance of Policy in Practice's support, which helped local authorities navigate complex data sharing agreements, internal approvals, and unfamiliar processes. At the same time, local authorities had to build internal capacity, including creating new posts, reallocating staff, and preparing teams, often requiring significant time and resources before full use of the tool could begin. Delays in approvals and data submissions meant that local authorities started using LIFT at different points, limiting the period of consistent data available for monitoring and engaging with benefit non-claimants. Overall, these initial stages of the pilot generally proved the most challenging. In the most extreme case, one local authority only reached the point of using the tool effectively almost by the end of the pilot. The majority of participating local authorities did use the tool effectively, but after some lag.

When using the tool, LIFT enabled local authorities to track eligible non-claimants and target outreach more effectively, initially focusing on Pension Credit. Some local authorities later expanded its use to other benefits, such as Attendance Allowance and FSM. The tool reduced the operational burden on Revenues and Benefits teams and allowed local authorities to rely more on evidence and less on assumptions. However, this stage exhibited the greatest variation in success across cases. Local authorities reported that the benefits associated with the tool depended on staff capacity and resources to maintain data updates, manage outreach activities, and follow up with households. Therefore, those who were understaffed faced some difficulties at this stage. As emphasised by the case studies, the effectiveness of tools such as LIFT depends heavily on adequate staff capacity and the appropriate skill sets, both to analyse the data and to act on it. An encouraging prospect is that the experience gained through using LIFT may, over time, enable more local authorities in Wales to resemble the Type C case study.

Some local authorities also highlighted limitations such as data inaccuracies and restricted coverage. While some local authorities explored the possibility of developing a similar tool in-house, capacity and resource constraints, alongside the ongoing requirements for maintenance and data management, meant that LIFT was considered the more practical option. However, other companies' analytical tools could potentially serve the same purpose. Through the pilot, however, a number of local authorities have learnt about the value of data in helping to focus entitlement take-up efforts, and they also feel they have learnt specifically about the LIFT platform, which they could build on in the future.

Although the tool is helpful to identify eligible households, it is up to the local authorities how they act on this data, and without doing that effectively, no results can be achieved. This issue is common to any data analytics tools employed. Communication campaigns were predominantly in the form of sending letters, but these were often complemented with text messages, phone calls, face-to-face visits, and campaigns aimed at wider audiences, such as on social media or in bus stops. The approaches to engagement have been carefully designed by local authorities, drawing on the learning from previous campaigns, as well as from the lessons learnt from other local authorities through the bi-monthly programme and

best practice meetings. For instance, local authorities felt that more targeted and intensive engagement was better than broader-based letter writing with limited support or follow-up. A further issue was the lack of trust among residents in the communications. Some recipients questioned whether the correspondence was genuine, which limited engagement. This example shows that communication alone can face barriers in terms of first being opened and then actually taken seriously. Including a reference to the support available from Citizens Advice appeared to help address these concerns and increase credibility. In this way, local authorities have learnt and refined their approaches over time, considering the feedback they received from potential claimants and support and advice organisations.

Overall, the number of communication campaigns conducted most likely increased as a result of the LIFT platform. Campaigns also became much more targeted, leading to better results at a lower cost than would have been achieved without LIFT. On average, local authorities told us that each of them has targeted between 100 and 250 non-claimant households in each campaign, with approximately 15% of those households reported to have ultimately received a benefit award. This meant an average of approximately 20 awards per LA following a campaign. Considering all campaigns and benefits targeted in each LA, on average, they report annualised financial gains for benefit claimants of around £200,000. Ultimately, the pilot contributed to increased income for some households and to improvements in wellbeing, including reduced stress and anxiety and increased trust in government.

These magnitudes of effects, important though they are, are modest in proportion to the total typical flow of new benefit claims, or to the overall scale of non-take-up. This is consistent with our analysis of aggregate time series data on Pension Credit claims and awards, which does not show clear differences between trends in participating and non-participating Welsh local authorities. Nonetheless, take-up takes time to materialise, and it is likely that at least a portion of the true impacts of the pilot are yet to occur.

Beyond measurable results, the pilot generated a strong community of practice, enabling local authorities to share knowledge, learn from one another's experiences, and refine approaches over time. In addition, and importantly, much of the value of the pilot appears to have been as an investment and proof of concept for local authorities. Most of them have, as a result, learnt valuable lessons about how to use data and analytical tools for the purpose of increasing benefit take-up, and will be able to do so more effectively in future (both using LIFT or other analytical tools). Some local authorities have also discovered additional use of the LIFT platform beyond benefit take-up, identifying households who may benefit from other services or support. Overall, this pilot demonstrates that data-led approaches can enhance targeting and operational efficiency, but local authorities require adequate staffing, resources, and ongoing support to fully realise its potential.

Annex A – Questionnaire for scoping interviews (except Policy in Practice)

Policy context

- Is there any relevant policy background we should be aware of to understand better the underlying purpose of the pilot?

    o Prompt: What was the policy problem the pilot sought to address?

    o Prompt: Why was a data-driven approach chosen?

- Are there any external factors or context that could affect the implementation of the pilot or targeted outcomes?

    o Prompt: Upcoming elections; Child Poverty Monitoring Framework publication; financial pressures; changes in devolved/reserved benefits.

Aims, objectives, priorities

- What are the core aims and objectives of the LIFT pilot from your perspective?

- Which benefits are you (or LAs) monitoring the most?

    o Prompt: devolved or reserved, targeted at specific age groups or other demographics? Does it vary much across LAs?

- To what extent do the objectives and priorities for implementing the pilot vary between LAs?

- What do you think the biggest barriers to take-up are today, and why do you think this tool helps to address them?

    o Prompt: Beyond identification of eligible individuals, take-up relies heavily on how LAs reached out to them. What were the main approaches to it? How effective you think LAs were at this?

- Are there any secondary goals beyond improving benefit take-up?

    o Prompt: reaching out to vulnerable households about things other than benefit take-up, e.g. other services or support they may benefit from?

    o Prompt: building analytical capacity; testing in-house development; modernising LA data systems; improving cross-department collaboration? Are you aware of LAs using analytical tools for other policy areas?

    o Prompt: Were these examples considered successful, and what lessons might apply here?

- Prompt: Do you think there is in-house capacity to develop a tool like this one (in LAs or WG)? Why or why not? How can you overcome data sharing agreements?

Additional thoughts – low priority

- How keen were LAs to participate in the pilot?

  - Prompt: Which LAs were more keen?: those who were doing the biggest effort but unsuccessfully? Those who were barely doing efforts and thought this was a low-cost approach? Etc.

- How would you describe the experience of LAs (easy/challenging) to implement the tool?

  - Prompt: Which were the main challenges and how were they overcome? E.g., legal, operational, staff capacity, training, etc.

  - Prompt: Were challenges mainly due to difficulties within LAs or due to challenges or complexities of the tool?

  - Prompt: How big of an issue were the data sharing agreements? We heard it took up to 6 months in some LAs

- Did the WG play a role in supporting them or did all the support come from Policy in Practice?

Evidence/stakeholders

- Are there any reports or key literature that you would recommend us to go through?

- Do you have any recommendations on which data to analyse beyond the monitoring data you shared? How can beneficiaries and eligible individuals be tracked?

- Can you identify any people who would be especially interesting to interview? E.g., specific LAs, third sector organisations, etc.

  - Prompt for WG: How to reach LIFT participants/claimants?

Annex B – Questionnaire for scoping interview with Policy in Practice

The LIFT platform

- You mentioned the parties involved in the data-sharing arrangements (e.g., DWP, HMRC). Which variables or datasets does each of them provide? Which datasets do local authorities provide directly?

- How can local authorities track who is eligible for a given benefit on the platform? What variables are included? Can you describe or show us what the dashboard looks like?

- Is the data displayed at the individual level, household level, or a higher level of aggregation?

- Is the data anonymised or do the LAs have access to personal information?

- Which individuals are included in the LIFT tool? Is it all individuals in the LA or a particular subsample?

  o Prompt: Can this potentially be expanded? On what does it depend?

- How often does the tool require data inputs, and is there a way to automate this to avoid placing a high time burden on LAs?

- Can local authorities use the tool or dashboard to track whether people they have contacted have actually claimed the benefit?

- Are there any imperfections or things to be aware of with the data?

Onboarding of the pilot

- What activities did local authorities need to carry out at the onset of the pilot? For example, building new teams, training staff, updating data, etc.

- Regarding data sharing agreements, could you please explain which parties are involved in this process?

- Why are data agreements done separately for every LA?

- How do you support LAs with data-sharing or integration issues?

  o Prompt: data preparation, data protection arrangements, staff training, etc.

Over the course of the pilot

- What have been the main challenges or surprises during rollout? How have they been addressed?

- Were there any LAs that required more support than expected?

- Which features of the LIFT tool do you see Welsh LAs are using most effectively, and are any being underused?

Communication campaigns and outcomes

- What indicators or evidence best demonstrate LIFT's impact so far?

  - Prompt: Beyond identification, does the tool encourage further engagement, therefore successfully contributing to the goal of increasing take-up?

  - Prompt: Can you give any examples of LIFT improving benefit take-up or support for vulnerable households?

- What have been the major successes of the Welsh pilot?

- Are there any external factors or context that could affect the implementation of the pilot or targeted outcomes?

  - Prompt: Upcoming elections; Child Poverty Monitoring Framework publication; financial pressures; changes in devolved/reserved benefits.

Sustainability and future direction

- How do you see LIFT evolving to support broader LA priorities (e.g., poverty prevention, early intervention)?

Annex C – Questionnaire for interviews with participating Local Authorities

Aims and priorities

- Which benefits are you primarily focused on in terms of improving take-up through the LIFT pilot?

- Are there are any particular groups or subsets of eligible non-recipients you are focusing on?

Onboarding of the pilot

- How did you find the onboarding process for the pilot? Did you encounter any challenges?

- At this stage, how was your experience with data sharing (i.e., data protection arrangements)?

  - Prompt: How long did it take before you were able to start using the tool?

- How would you describe the training sessions and the support provided by Policy in Practice?

Over the course of the pilot

- For the tool to function effectively and remain up to date, what tasks did you need to carry out regularly? How much of a burden were these tasks on the council?

  - Prompt: time, training, staff allocated specifically to this pilot, updating the data, etc.

- Beyond the LIFT license, did Welsh Government also fund any staff, training, or engagement activities?

- Specifically what information from the tool are you using to identify people who are eligible non-claimants? How is that information displayed?

  - Prompt: Can you track the information at the individual level in the dashboard? What are the main variables you are looking at?

- To what extent did the tool help you identify cases that you would not have identified otherwise?

- What challenges or barriers did you encounter while using the tool? Can you think of any improvements that could be made to the tool or the pilot?

- In your view, what are the main advantages of the tool? What aspects do you find most valuable?

- Do you think you have used the tool to its full potential, or are there certain benefits or target groups or datasets that could still be leveraged?

Communication campaigns and outcomes

- What barriers to improving take-up you find even conditional on having identified eligible non-claimants?

- What were the main engagement strategies you have used (or plan to use) to increase take-up?

- Does the tool offer a mechanism for tracking whether the people you have contacted went on to take up a benefit? Or do you hear from those people directly?

- What efforts were you making to increase benefit take-up before the LIFT pilot? Were they effective?

- To conduct communication campaigns in the future, would you need access to constantly updated information, or does the information you currently have suffice?

- How effective do you think the communication campaigns have been in increasing take-up? Why?

  - Prompt: Can you provide any figures? E.g., by how much did take-up increase over this period?

- Did you engage with any of the following organisations? How?

  - Child Poverty Action Group

  - Disability Wales

  - Age Cymru

  - Citizens Advice

  - Welfare Rights Advisors Cymru

  - National Advice Network for Wales

Suggestions/reflections

- What barriers do you see to developing and implementing an analytical tool like LIFT internally?

- How much do you rely on the tool to continue implementing these outreach activities? In other words, without extending the pilot, could you use the learning/capacity building from the 12-month pilot to reach out to eligible non-claimants?

Annex D – Questionnaire for interviews with non-participating Local Authorities

Aims and priorities

- What are your LA's main priorities regarding benefit take-up?

  - Prompt: Are there specific benefits or resident groups where you believe take-up is currently low?

  - Prompt: Which benefits are you primarily focused on in terms of improving take-up?

- What tools, data sources or processes do you currently use to identify eligible non-claimants?

Non - participation reasons

- What were the main reasons your authority did not join the LIFT pilot?

  - Prompts: capacity, governance requirements, resourcing, timing, IT/data barriers, uncertainty about value, competing priorities.

- Do you feel you had the information you needed at the time to make that decision on whether to participate or not?

About LIFT's usefulness and expectations

- Based on what you know, how relevant or valuable do you think a tool like LIFT could be for your authority?

  - Prompt: Which aspects of such a tool (if any) do you think would be most beneficial to your work?

  - Prompt: How would LIFT platform make a difference in your current processes?

- Are there any benefits where you think additional data insight would significantly help increase take-up?

Capacity and resources

- What information exactly are you using in order to identify people who you think are eligible non-claimants of those benefits?

- Do you currently have staff or skills dedicated to analytical work related to benefit take-up?

- What support would be most helpful from Welsh Government to improve benefit take-up locally?

- Are there systemic or structural barriers that make it difficult to identify eligible residents?

- What types of data or insight would have the greatest impact on your authority's work?

Communication campaigns and outcomes

- What challenges do you face when trying to raise awareness or encourage take-up?

- What are the main engagement strategies you have used (or plan to use) to increase take-up?

- What barriers to improving take-up you find even conditional on having identified eligible non-claimants?

Suggestions/reflections

- Under what circumstances would your authority consider using a tool like LIFT in future?

  - *Prompts: fully funded licence, dedicated staff, clearer data governance, evidence of impact, lighter onboarding.*

- Are there any improvements or features that would make the tool more attractive for your council?

Annex E – Questionnaire for follow-up interviews with participating Local Authorities

Reflections since the initial interview

- Since we last spoke, are you still using LIFT?

    o If yes: Has anything changed in how you are using LIFT?

    o If not: Why are you no longer using it?

Communication campaigns and results

- Approximately how many letters or communications were sent after using LIFT?

- Did you see increases in take-up after these campaigns? Can you share any figures?

- Have you systematically checked whether everyone contacted has claimed?

    o If not, what are the limitations of your data?

- Can you describe the content of the letters or communications sent through LIFT? (Could you share the letter?

    o Were they primarily about awareness of eligibility?

    o Did they include guidance on how to claim?

    o Was support offered (e.g. helplines, referrals, follow-up)?

    o Was stigma explicitly addressed in the wording?

- Can you link increases in claims/take-up directly to LIFT?

    o How confident are you in these figures?

- Which elements do you think mattered most in encouraging action? Did you test or adapt messaging over time?

- Aside from letters, did you conduct **targeted** outreach to households in any other way?

    o For example, after sending 100 letters we received 35 claims.

    o Are there particular groups where take-up appeared higher or lower?

- Were there any external factors (e.g. cost-of-living pressures, national messaging, staffing changes) that may also explain changes in take-up?

- What data would help you better understand whether campaigns like LIFT are working?

- Aside from targeted outreach facilitated by LIFT, what other broader approaches or campaigns have you used to increase benefit take-up (e.g. social media, community outreach, partner organisations)?

- Have any of these non-LIFT campaigns led to noticeable changes in uptake?

    o If not, why do you think that is?

    o How would you compare the effectiveness of these approaches with LIFT?

- Which of these campaigns were already in place before the pilot and which ones are new?

Financial impact

- Are you able to estimate the financial value of additional benefits claimed as a result of the campaign?

- Where available, how much additional income did this represent for residents?

- How useful is this kind of financial data for decision-making within the council?

Resourcing and data sharing

- How many full-time staff have been allocated exclusively to managing or supporting the LIFT tool?

- Could you tell us in more detail about the challenges or hoops you had to overcome for the data-sharing arrangements for LIFT?

    o What exactly was being agreed to, and what conditions did your local authority need to satisfy for DWP/HMRC to approve the arrangement?

    o What lessons were learned from this process that could be applied in the future?

- Beyond LIFT, are you involved in any other data-sharing initiatives linked to Streamlining Welsh Benefits?

    o What are the main constraints limiting data sharing within your organisation or with external partners?

Assessment and learnings

- Why was a third-party platform like LIFT needed, rather than developing an in-house solution?

- What conditions need to be in place for a tool like LIFT to be successful?

Barrier to take up

- From your perspective, what are the main barriers preventing eligible residents from claiming benefits?

    o Did LIFT help to address any of these barriers? If so, how?

    o Which barriers remain unaddressed, and why?

Conclusion

- As part of our research, we want to speak to some benefit claimants. Would it be possible for you to share with us the contact details of people you have identified though LIFT and who have recently applied for benefits?

Annex F – Discussion guide for focus group with advice and support organisations

Questions
Introductions
Welcome, and thank you for joining today. To start, let's go around the group and introduce ourselves. Please tell us: • Your first name • The organisation you are from • How have you supported LAs in benefit take up
Ice breaker and discussion trigger
We're going to start with a quick interactive activity to get a sense of the room and survey different perspectives before we begin our discussion. We're using a tool called Mentimeter. This will allow everyone to respond privately on their phones or laptops, and we'll see the results appear in real time on the screen. [Share the link to Mentimeter] **Q1: Overall, how challenging do you think is benefit take-up in Wales today for people?**   What surprises you about this spread? What resonates with your experience? Would anyone like to speak from the not challenging / challenging sides? Why do you think it is [Not challenging / Challenging]? Can you think of a particular situation from your organisation that captured why is or not challenging? [Types of benefits discussed by LAs: Means tested benefits (pension credit, free school meals) or attendance allowance]

Barriers to benefit take-up in Wales

- From your experience, what are the main reasons people in Wales do not claim the benefits they are entitled to?

  Prompts: stigma; lack of awareness; digital literacy; mistrust in authorities; complexity of applications; fragmented advice systems; documentation requirements.

- Are there particular groups or communities you find are more likely to face barriers to benefit take-up? Why?

  Prompts: people with disabilities; older adults; carers; households with no recourse to public funds; rural communities; Welsh language needs.

- Are the main barriers today more about identification or engagement?

  Prompt: Where do these barriers originate: policy design, communication, administrative processes, culture, or something else?

Experience of working organisations to increase take-up

- What kind of work does your organisation do to increase benefit awareness and take-up?

  Prompts: outreach events, drop-in centres, helplines, casework, digital campaigns, home visits, community champions.

- Which approaches have been most successful, and why?

  Follow-up: Do they reach particular groups more effectively?

- When working independently, how do you identify potential claimants who may be missing out?

  Prompts: self-referral, partner referrals, targeted sessions, anecdotal evidence, community intelligence

Experience of working with Local Authorities to improve take-up

- How would you describe your experience of working with Local Authorities to support benefit take-up?

  Have in mind to discuss: how it is to work with LAs that are participating in the pilot vs those that are not. For example, we could learn if LAs conduct a much better targeted outreach when they use LIFT, and therefore have a higher success rate,

than when they work with non-participating LAs, that have a less clear idea of who they need to target.

- Have you noticed any changes in demand for advice or support (for example, more referrals, enquiries, or requests for help)?

  Prompt: What approaches have you seen Local Authorities use that were genuinely effective in reaching eligible people?

- Where have you experienced challenges in partnering with LAs on outreach or awareness campaigns?

- What approaches have you seen LAs use that were genuinely effective in reaching eligible people?

  Prompt: use of trusted intermediaries; co-design with communities; joint outreach sessions; warm referrals.

- How effective have LAs been at sharing information about eligible residents or coordinating outreach activities?

- Where do you feel partnership working breaks down or becomes difficult, and why?

  Prompts: communication; limited capacity; unclear responsibilities; slow processes; data sharing barriers.

- Are Local Authorities receptive to external expertise from advice charities and community organisations?

  Follow-up: What strengthens or weakens that relationship?

Views on data-driven tools

We're going to discuss your views on data-driven tools as a way to tackle barriers for take up. We're using Mentimeter again. Please follow the link [Share the link to Mentimeter]

[Example of possible trigger question]

Q3: Do you think data-based tools (like eligibility dashboards or targeted lists) can genuinely improve take-up in Wales?

- 1 = Data tools won't make much difference

- 5 = Data tools could transform take-up

What surprises you about this spread? What resonates with your experience? Would anyone like to speak from the far left / far right perspective?

- Does data help?

    o Where data tools could help with take-up

    o Where data tools cannot help

    o Pre-conditions for data tools to succeed (funding, caseworkers, referrals, data-sharing, trust, etc.)

- Which types of barriers could data tools help tackle, and which barriers will remain regardless of data?

    Prompt: great for identification vs. poor for trust, stigma, and engagement.

- What capabilities would organisations need to use a tool like LIFT effectively? *Prompts: recruitment, training, data sharing agreements, funding, community intermediaries.*

Recommendations and consensus

- What are the top three actions that Welsh Government, Local Authorities, or advice organisations should prioritise to improve benefit take-up?

- What would be a short-term action and what would be a longer-term change?

- Is there anything important we haven't asked that you think matters in this discussion?