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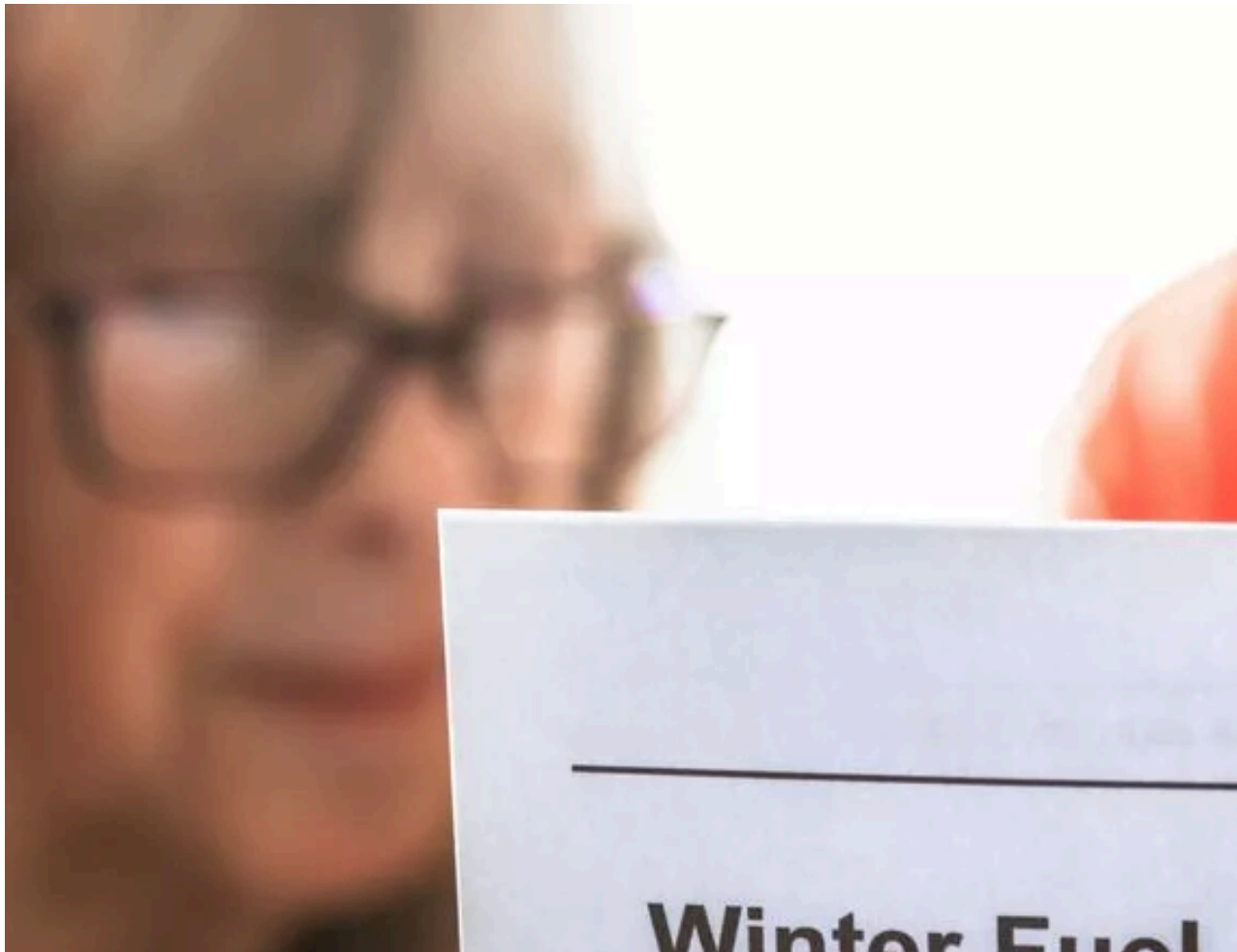
IMPROVING
CARE



INSPIRING
PEOPLE



SUSTAINING
OUR FUTURE



PENSION CREDIT UPTAKE IN CWM TAF MORGANNWG

INNOVATION SPRINT REPORT.

A MULTI-ORGANISATIONAL PROJECT ADDRESSED PENSION CREDIT UPTAKE IN CTM, IMPROVING FINANCIAL, HEALTH AND HOUSING OUTCOMES FOR PENSIONERS.

MEET THE TEAM

Our multi-organisational project is dedicated to improving financial, health and housing outcomes for pensioners in the CTM region. By working in partnership with a range of organisations, we aim to address the gap in Pension Credit uptake among eligible individuals.

Our efforts have led to significant financial gains for our clients and enhanced the overall well-being through targeted interventions and community outreach.

 <p>AGE CONNECTS MORGANNWG</p>	 <p>BAVO Bridgend Association of Voluntary Organisations Cymdeithas Seiyllidau Gwirfoddol Pen-y-bont ar Ogwr</p> <p>BRIDGEND ASSOCIATION OF VOLUNTARY ORGANISATIONS</p>	 <p>BRIDGEND CARERS CENTRE</p>	 <p>Bridgend County Care & Repair Gofal a Thrawsio Sir Pen-y-bont</p> <p>BRIDGEND COUNTY CARE & REPAIR</p>	 <p>Cwm Taf Care & Repair</p> <p>CWM TAF CARE & REPAIR</p>
 <p>CITIZENS ADVICE MERTHYR TYDFIL</p>	 <p>CITIZENS ADVICE RCT</p>	 <p>CTM UHB</p>	 <p>Adran Gwaith a Phensiynau</p> <p>Department for Work & Pensions</p> <p>DEPARTMENT OF WORK & PENSIONS</p>	 <p>HAFOD HOUSING</p>
 <p>MERTHYR TYDFIL County Borough Council Cyngor Bwrdeistref Sirof MERTHYR TYDFUL</p> <p>MERTHYR TYDFIL CBC</p>	 <p>CTM PUBLIC HEALTH TEAM</p>	 <p>Cwm Taf Morgannwg Partneriaeth Rhanbarthol Regional Partnership</p> <p>REGIONAL PARTNERSHIP</p>	 <p>RIC Hub</p> <p>Cysylltu Trawsfurfio Cymell</p> <p>Hosted by iCTM Endorsed By RPB</p> <p>Connect Transform Motivate</p>	
 <p>RHONDDA CYNON TAF CBC</p>	 <p>RHONDDA HOUSING ASSOCIATION</p>	 <p>Cymoedd i'r Arfordir Valleys to Coast</p> <p>V2C</p>		

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EXECUTIVE SUMMARY

In response to UK Government 2024 discontinuation of winter fuel payments in England and Wales, our multi-organisational project effectively addressed the gap in Pension Credit uptake among eligible individuals in Cwm Taf Morgannwg (CTM). With nearly **1 in 5** older individuals in Wales living in poverty and an estimated **7,000 people** in CTM not claiming their entitled Pension Credit, our initiative led by the innovation team in CTM, driven by a collaborative effort among public health teams, local councils, and various charity and organisations, aimed to enhance both financial and health outcomes for pensioners.

The Innovation sprint successfully identified **689** patients with respiratory health conditions, **6,768** instances of outreach efforts through direct engagement, assessed and supported **1,890 clients**, securing a confirmed income increases totalling **£1,655,551.83**. Additionally, we anticipate further annual income gains of **£961,103.19** from pending applications, highlighting the significant financial impact and enhanced support provided to the community of CTM.

Looking ahead, the focus remains on optimising service delivery through clear referral pathways, expanding communication efforts, embedding data linkage into routine operations, and exploring new avenues for engagement and awareness campaigns among pensioners.



Labour said absolute pensioner poverty had increased by 300,000 under the previous Conservative-led governments (Peter Byrne/PA) (PA Wire)

While this successful initiative highlights the strength of collaborative action in bringing significant positive impacts to people within CTM, there remains considerable work to be done. We must continue our efforts to support the remaining individuals, like Mrs Jones' quote below, who still need assistance from our multi-organisational team.

I couldn't apply for Pension Credit without the Community Navigator's help, I didn't know where to start especially with the computer.

I appreciate the work you have done for me..It's has made a huge difference. I know I can contact you if I need any help in the future.

Thank you so much!

BACKGROUND



In 2024, the UK Government announced that the winter fuel payment in England and Wales will be means-tested, leading to as many of 2 million pensioners will no longer receive this payment across England and Wales. Almost 1 in 5 older people in Wales are living in poverty. In November 2022, the Older Peoples Commissioner highlighted that up to 80,000 older people in Wales do not receive Pension Credit that they are entitled to, and approximately up to 7,000 older people in CTM are not claiming. Pension Credit provides extra money that can help with living costs to people over State Pension age and on low incomes, which is worth an average of £65 a week to those who are eligible and unlocks other entitlements that provide further financial support.

Pension Credit is a gateway benefit, meaning that if an individual qualifies for Pension Credit, they will automatically qualify for other allowances, which opens other support options to improve overall quality of life and wellbeing. However claiming these entitlements is not solely focused on reducing financial burden, it can also have a significant benefit to their health and wellbeing.

Each year, the NHS spends an estimated £1.4 billion on treating illnesses linked to living in cold or damp housing, as these conditions can worsen asthma, other respiratory illnesses, and increase the risk of heart disease and cardiac events. They also exacerbate musculoskeletal issues like arthritis. Moreover, the impact of living in such environments can be linked to mental health, with higher rates of depression and anxiety among affected individuals



Several charities within CTM, and the wider regional partners, are working in collaboration to target vulnerable pensioners living in CTM, who may be eligible to apply and supporting them with relevant applications. This document outlines the project's objectives, the strategic approach employed, the challenges faced, and the outcomes achieved with future recommendations

PURPOSE

This multi-organisational project, which aimed to;

1. Increase the awareness and uptake of Pension Credit among eligible individuals in the CTM region.
2. Utilising local population health data to target the identified individuals within CTM, highlighting the importance of targeted interventions to improve health challenges.
3. Quantify the increased financial benefit that this brings.

 GOV.UK

Press release

Nearly fifty thousand extra pensioners receiving vital Pension Credit support following surge in claims processed

New figures published today [Thursday 27 February] show a significant spike in Pension Credit applications following a DWP campaign to boost uptake, the highest since comparisons began in 2020.

TIMELINE

The following provides an overview of events and initiatives aimed at addressing the discontinuation of the Winter Fuel Allowance and promoting the uptake of Winter Fuel allowance and Pension Credit, within CTM. This period saw a series of collaborative efforts among various stakeholders to raise awareness and support within the community.

What Was Done	Where it was held	Why we need it
22nd August - Announcement of the Winter Fuel Allowance discontinuation.	Government Announcement	To inform the public about changes affecting benefit entitlements, especially for those who rely on this allowance.
17th September- Initial discussion held with Age Connects Morgannwg.	CTM UHB / Age Connects Morgannwg	To explore collaborative effort in addressing the impact of the Winter Fuel Allowance discontinuation and other benefit-related challenges to people within CTM.
18th Septemebr - RCTCBC agreed on a 3-pronged approach of Targeted, Generic, and Community.	Steering Group	To effectively address community needs and engage different groups impacted by changes in benefits, ensuring comprehensive support
23rd September - Meeting conducted with CTM Public Health.	Steering Group	To discuss public health implications and collaborative strategies in response to benefit changes.
24th September - First Pension Credit meeting involving RCTCBC, CTM Public; Health, RIC Hub, and Age Connects Morgannwg, with weekly meetings convened.	Steering Group	To coordinate efforts and streamline processes for optimising Pension Credit uptake.
9th October - Script shared by Public Health team.	CTM UHB/ RP Communications Team	To standardise communication and ensure accurate information dissemination regarding Pension Credit.
14th October - Pension Credit Week.	CTM	To promote awareness and uptake of Pension Credit among eligible individuals.
16th October - Discussion of webpage plan at Regional Partnership (RP) meeting;ACM Roadshow plan developed.	Steering Group	To enhance online resources and outreach activities for community engagement and support.
25th October - Completion of FAQ document for RP website.	Steering Group	To provide comprehensive answers to common questions, aiding understanding and navigation of benefit changes.
5th November - Discussion around public health script for Phillip Daniels	Steering Group	To refine messaging and ensure effective communication within public health contexts.
6th November - Draft of the Regional Partnerships website created.	Regional Partnerships	To facilitate access to information and resources for community support and collaboration.
8th November - Video by Phillip and Rachel on the importance of Pension Credit; uptake completed; CTM Communications launched the initiative during 'It's Talk Money Week'.	CTM/ TP Communications Team	To use multimedia tools to raise awareness and encourage the use of Pension Credit among the target audience.
20th November - Update from Merthyr CBC: Pension Credit Week held, ongoing; weekly drop-ins, and joint awareness session.	Merthyr Tydfil Town Centre Hub, Treharris, and across the borough.	To sustain engagement and support for Pension Credit claims, ensuring wider community reach.
16th October- Benefit event held by Bridgend County Care & Repair & Age Connects Morgannwg	Maesteg, Bridgend	To provide on-the-ground support and raise awareness about benefits entitlements and procedures.
10th January - Age Connects Morgannwg and Citizens advice went on GTFM Radio show to discuss PC.	GTFM Radio show	Discuss the topic of Pension Credit and other related benefits to pensioners.
20th January - Age Connects Morgannwg & by Bridgend County Care & Repair Event	Coychurch Memorial Hall	To engage with the community and offer support with benefits queries and applications.
14th February - Age Connects Morgannwg Event	Pontyclun Community Centre	To assist clients with benefits advice and ensure wider access to necessary support.
Age Connects Morgannwg & by Bridgend County Care & Repair Event	Maesteg Leisure Centre	To provide targeted support for benefits inquiries and promote community awareness

WORKSTREAM 1



CTM UHB PUBLIC HEALTH TEAM

Activities and Outreach:

- Assisted in evaluating the overall initiative, ensuring effective monitoring and reporting of outcomes.
- The Director of Public Health created a promotional film to raise awareness.
- Distributed the Gov. Wales poster to all primary care providers to enhance awareness.
- Collaborate with informatics team who identified approximately 700 patients (>65 years) on the respiratory list to be contacted proactively
- Applied for additional funding to support ongoing community events and outreach efforts.
- Provided health checks and lifestyle coaching at community events to support residents' well-being.
- Developed a Making Every Contact Count (MECC) message to share with stakeholders, promoting the uptake of Pension Credit.

Impact

- Immediate outreach and community engagement efforts have begun fostering better health practices and financial awareness among the targeted population.
- Establishes a sustainable framework for ongoing support and engagement for our population, contributing to overall community health improvement and financial stability.
- Targeted vulnerable respiratory patients over 65 along with their families to ensure they are aware of the financial help available as well as referral to third sector to support their application as appropriate

Key Outcomes:

- 689 patients who is 65 years or older had been in contact with the respiratory team in the health board was identified using data available from informatics teams.
- 85% of patients identified were successfully contacted by the CTM public health support services
- Of those whom were contacted successfully (585 individuals):
 - 30% were already receiving pension
 - 25% were self-identified as over the income threshold for pension credit
 - 19% were directed the Government website to check eligibility/apply
 - 15% were referred to the Care and repair or Registered Social Landlord (RSL) for additional support to check eligibility/complete the application
- A follow up evaluation is scheduled to be completed in late 2025 to gather additional information around the success in application of pension credit

WORKSTREAM 2



AGE CONNECTS MORGANNWG

Activities and Outreach/ Key Dates:

We are committed to supporting our community through a series of benefits outreach events designed to assist overflow clients. These events provide an opportunity for attendees to receive guidance and support in accessing their entitled benefits. In addition to our regular sessions at Aberdare Library and the Merthyr Council Civic Centre, we have scheduled three supplemental events in early 2025 across various locations to better serve our community's needs.

Impact

While our community events in January and February did not attract as many attendees as anticipated, the increased visibility through social media and word-of-mouth has successfully generated a higher volume of benefits inquiries, both over the phone and in person.

Key Outcomes:

Since receiving additional funding in October 2024, ACM has achieved the following from October 1, 2024, to February 27, 2025:

- Conducted benefits assessments for 684 clients.
- Submitted applications for benefits for 451 clients, including 25 Pension Credit applications, 164 Attendance Allowance applications, 19 Carers Allowance applications, 19 Disability Living Allowance review applications, and 34 Personal Independence Payment reviews.
- Secured a confirmed income increase of £847,988.24* for clients.
- Identified potential overall income gains exceeding £1 million per year.
- Among these cases, 110 clients reported chronic respiratory issues such as COPD, asthma, and pulmonary fibrosis. Our team has focused on enhancing their household income, especially given concerns over losing the Winter Fuel Payment and the challenges of living in cold conditions while managing breathing difficulties in cold properties.

**Methodologies for Calculating Income Gains across ACM, Care & Repair & Citizen Advice:*

- *Actual successful applications between October & March (to date)*
- *Projected figures based on average outcomes for applications awaiting decision (in the system at point of reporting)*
- *Please note this includes Attendance Allowance as well as clients have been assessed for all benefits in that period and as a result of this campaign*

WORKSTREAM 3



CWM TAF CARE AND REPAIR

Activities and Outreach:

- 5 targeted Pension Credit events attended to date
- Received 39 direct referrals from Public Health, these are now being tracked through Care & Repair core service to target interventions to support clients with housing repairs, aids and adaptations and to ensure they are living in a warm, safe and secure home. All 39 clients sent a Care & Repair leaflet for future contact if required.
- All clients visited in Q3 & Q4 have received a benefit check to and assessed for Pension Credit, Attendance Allowance and any other benefits they may be entitled to
- Interviewed on GTFM to talk about the campaign and the wider CR service to improve clients health & wellbeing
- Promoted campaign through Care & Repair Social media channels

Impact

- Improved partnership relationships to ensure clients receive a positive ageing experience
- Direct communications released for access to CR support for benefit applications
- Promoted Care & Repair Older not Colder service that has direct links to Healthy Homes, Healthy Lives
- Maximised clients income to reduce financial strain

Key Outcomes:

- 888 clients assessed for benefit maximisation by CR in Q3 & Q4 (to date)
- 49 Benefit applications submitted in Q3 & Q4 (to date)
- 31 successful benefits awards received in Q3 & Q4 (to date) to the value of £174,148 per annum
- 28 benefit awards awaiting decision with a projected maximisation of £157,294 per annum

WORKSTREAM 4



BRIDGEND COUNTY CARE AND REPAIR

Activities and Outreach:

- Distribution of promotional materials to patients at Princess of Wales Hospital, to include ED, GP Surgeries in North & East Clusters and the catchment areas where the events were held
- Presence at 3 campaign events across Bridgend
- Promotion of the campaign and events on social media i.e. Facebook
- 100% of clients are offered a benefit check

Impact

- Received 32 referrals as a direct result of CTMUHB initiative - 100% offered a benefit check and offered a Healthy Homes Check addressing poverty, damp/cold homes, provision of adaptations etc.
- Home Energy Officers managing referrals offering advice on improving cold homes
- 10 direct referrals from Campaign events
- Reaching those in deprived areas to reduce poverty
- Over 770 followers on Facebook resulting in likes and shares regards to PC Campaign Events
- Increased awareness amongst the team on the importance on benefits, health & housing

Key Outcomes:

- Bridgend County Care & Repair offers a benefit check to 100% of clients who receive a healthy homes check
- Since 1st October assisted 34 clients with Pension Credit applications:
 - Of those awarded (5 applications) £17,999.03
 - Of those 29 awaiting outcomes we anticipate an annual increase £104,394.38
- Since 1st October staff have completed 210 other benefits applications (i.e. WHD, Council Tax, Attendance Allowance):
 - of those awarded (74 applications) £381,108.06
 - of those waiting outcomes (136 applications) we anticipate an annual increase £700,414.81
- Those assisted with benefit applications, each client would have received a Healthy Homes Check addressing housing concerns such as:
 - Falls prevention
 - Cold homes
 - Heating advice
 - Provision of adaptations &/or equipment
 - Fire safety & Carbon Monoxide advice / referrals on
 - Priority registers
 - Referrals and signposting onwards

WORKSTREAM 5

cyngor ar
bopeth

citizens
advice

CITIZENS ADVICE RHONDDA CYNON TAF (RCT)

Activities and Outreach:

From October 2024 to February 2025, Citizens Advice RCT has made a significant impact by offering invaluable support to individuals facing challenges related to state pension and pension credit issues. During this period, our dedicated team assisted 284 people, guiding them through complex processes, offering advice, and helping them navigate the intricacies of their financial entitlements.

Citizens Advice RCT, organised and participated in a series of targeted community events, where we provided residents with free, confidential, and impartial advice on Pension Credit. These events played a crucial role in expanding our reach, spreading the message and making our services more accessible by bringing expert guidance and practical support directly into the community.

Impact

Through our casework and specialist knowledge, we have been able to secure a total of £234,308.50 in financial gains for those we've supported since October 2024 to February 2025. This work has had a meaningful and positive effect on the lives of those individuals, helping to remove financial stress and ensuring that people are receiving the support they are rightfully entitled to. This is a significant increase compared to the same period last year, when we supported 148 individuals, securing £79,829 in financial gains.

Key Outcomes:

This year, we not only helped more than double the number of people; 284 compared to 148 previously. Additionally, we have more than tripled the total amount of financial gains, which rose from £79,829 last year to £234,308.50 this year. This substantial increase in both the number of people supported and the financial gains achieved reflects the effectiveness of our approach, which includes detailed benefit checks and proactive assistance with applications.

The increase in the number of individuals receiving support can also be attributed to our continued commitment to reaching more people in partnership with Age Connects Morgannwg, Care and Repair CTM, local MP's Public Health and CTM UHB.

WORKSTREAM 6

cyngor ar
bopeth

citizens
advice

CITIZENS ADVICE MERTHYR TYDFIL

Activities and Outreach:

With this funding, Citizens Advice Merthyr Tydfil has been able to extend its operating hours to include one evening per week and Saturday mornings. This expansion allows clients to visit the office or schedule telephone appointments at times that may be more convenient, especially if they have a relative who can only offer support outside of regular hours. As a result, we have been able to assist an additional 41 clients, securing a total income gain of £76,000 for them.

Background:

Our client, a 70-year-old individual, was struggling financially despite receiving a full State Pension. They had no other sources of income and were facing significant daily challenges due to multiple health conditions. Living alone in their own home, which they own outright, they were unaware of the financial support available to them.

How We Helped:

The client approached Citizens Advice Merthyr Tydfil for support. After discussing their situation, we identified that they were eligible for Attendance Allowance (AA) but were unaware of the benefit or the application process. We provided clear guidance on AA, helped them understand the eligibility criteria, and supported them in making a claim. Additionally, the client was experiencing financial hardship due to rising energy costs. As part of our holistic approach, we provided tailored energy advice to help them manage their bills more effectively.

Key Outcomes:

The client's Attendance Allowance claim was successful, providing them with additional financial support to help manage their daily needs. With the AA award in place, we advised the client to apply for Pension Credit, which they became eligible for due to the Severe Disability Addition. As a result, the client's overall income increased, improving their financial stability and reducing their stress. They are now more financially secure and able to afford essential living costs, including energy bills. Total income gain for the client is £151.10 a week, £7857.20 per annum.

Impact:

The client expressed immense gratitude for the support they received from Citizens Advice Merthyr Tydfil. They had been unaware of the financial help available to them, and through our assistance, they now have increased income and financial peace of mind. They stated "I am so grateful for your support and help, I would not have known this benefit was available for me in my situation, thank you". This case highlights the critical role we play in supporting vulnerable individuals, ensuring they receive the benefits they are entitled to, and improving their overall wellbeing.

WORKSTREAM 7



RHONDDA CYNON TAF COUNTY BOROUGH COUNCIL (RCT CBC)

Activities and Outreach:

In preparation for Pension Credit Week, working internally and locally with communities, and regionally with CTM UHB and commissioned advisors to target specific groups at risk by sharing information.

Focus Areas:

- Targeted - Working locally with internal services to identify specific households:
 - Ensure residents known to adult services are aware of the need to check their household eligibility.
 - Ensure residents known to be in receipt of Council Tax Relief and of pensionable age/meeting the age criteria for pension credits, are aware of the need to check their household eligibility.
 - Ensure formal and informal Carers known to Local Authority are aware of the need to check their household eligibility or that of the person being cared for. Email sent via Carers Support Project.
- Generic – Working more broadly to alert resident of RCT:
 - Posting regularly and routinely on RCTCBC Social Media Channels
 - Information displayed in all Council public places. Libraries, Leisure Centres etc.
- Community – Alerting organisations known to provide community activities to inform service/building users.
 - Emailed 794 community groups and/or individuals asking them to put up Welsh Government posters and encourage older people, carers, family members to check their household eligibility and signposting to online and community-based support.

Impact:

- 1315 letters sent to residents in receipt of Adult Service Support
- 2769 letters sent to residents known to Council Tax Relief

Key Outcomes:

- Regional partnership working, focusing of attention on one specific area can produce better services, and support for residents.
- Shared information and resources. Reduced pressure on one sole delivery agent.
- Use of Community responders.

WORKSTREAM 8



Adran Gwaith
a Phensiynau

Department
for Work &
Pensions

DEPARTMENT FOR WORK & PENSIONS (DWP)

Activities and Outreach:

DWP colleagues delivered initial Pension Credit Campaign overview in October 2024 to Welsh Government and representatives of the 22 Wales Local Authorities. Following this, a subgroup has been created for duration of the Pension Credit Campaign to promote awareness and share MI, issues, event awareness etc. across the 22 Wales Local Authorities and associated partner organisations, along with our DWP PC Policy colleagues.

As part of DWP's communications campaign aimed at increasing Pension Credit applications, we were actively collaborating with charities and support organisations and media outlets to raise awareness and promote Pension Credit. We are encouraging everyone to consider whether they know individuals, such as parents or grandparents, who may be eligible for Pension Credit. We recommend visiting the Pension Credit calculator to determine potential eligibility and ensure those who qualify receive the support to which they are entitled. Our Partnership Teams in Work & Health have put in place plans for local engagement and promotion in every district, working with local authorities and other partners to reach out to potentially eligible people.

Following this model, Wales Devolution team have worked with DCW to revise the webinar mode for Pension Credit (PC) purposes. MP event in the Cynon LINC in Aberdare, 20 people were spoken to and those not able to complete a calculation at that time were signposted to the Pension Credit calculator, and issued the Official DWP Pension Credit leaflet explaining where the calculator could be found at <https://www.gov.uk/pension-credit-calculator> and recommended to make a claim for Pension Credit if eligible. However, a Pension Credit calculator was completed with 16 individuals who were able to complete on the day with 45% potentially eligible, these were then signposted to providers in attendance at the event.

Impact:

A few examples of some of the activities undertaken locally, due to the local ingenuity there are too many variations to mention here.

- E&P teams engaged with all Local Authorities, libraries, GP surgeries, pharmacies, and more.
- Visiting offices attended events providing 121 support for customers.
- Events held across the country to engage with and support pensioners and their families.
- Worked hand in hand with Local Authorities to deliver targeted events.

Outcomes:

- Feedback brought the campaign to life and showed levels of ingenuity.
- Resources provided were well-received.
- Light touch governance and focused scope prevented scope creep.
- Central production of products prevented duplication.

Recommendations:

A few suggestions have been made from colleagues following their support of the campaign in relation to the calculator.

- The outreach campaign focussed on the use of the calculator prior to making a claim which it is hoped reduced the number of unnecessary claims. It was felt the external campaign and the toolkit on Gov.uk should put more emphasis on using the calculator before a formal application.

WORKSTREAM 9

REGISTERED SOCIAL LANDLORD'S (RSL'S)



Cymoedd i'r Arfordir
Valleys to Coast

Activities and Outreach:

We contacted a number of partner RSL's across CTM to understand their internal campaigns to support customers aged 66+ with Pension Credit uptake.

Internal campaigns included –

- Using data to identify customers aged over 66 and those who had had little interaction with their landlord in recent times. Income teams were then scheduled to make welfare calls to these customers and to support their benefit claims.
- RSL's used customer newsletters, social media channels and text messaging services to help raise awareness of Pension Credit uptake across their customer bases
- RSL's ensured posters and information on Pension Credit were made available in their older people's accommodation as well as hosting money advice sessions at these locations

In addition, several RSL's joined drop-in events hosted by our third sector partners, offering money advice services as part of the events. The Public Health Team were also able to refer patients from the targeted list direct to their Housing Association landlord for money advice and support.

COMMUNICATIONS

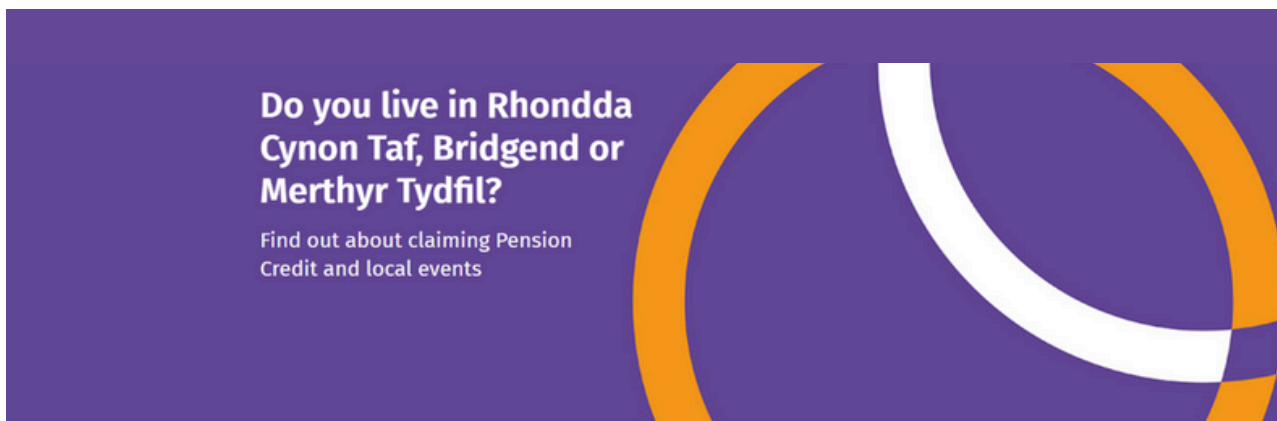
THE IMPORTANCE OF A COMMUNICATIONS STRATEGY IN COLLABORATIVE HEALTH AND THIRD SECTOR PROJECTS:

When several partners across the health and third sector collaborate on such a large scale, regional project such as this, a well-defined communications and engagement strategy is essential for ensuring successful outcomes. Effective communication fosters transparency, strengthens relationships, and ensures that all stakeholders are aligned in their individual and collective responsibilities, partnership goals, project messaging, and in their approach to measuring partnership success and overall project impact.

The success of this project has been strongly linked to the underlying strength of existing partnership arrangements amongst the third sector in CTM, coupled with solid working relationships, which enabled this project to be mobilised with significant pace and efficiency.

This section of the report highlights the key considerations for communications and engagement specifically; for supporting any future partnership/s with a similar remit and purpose i.e. set against core population and public health objectives for residents of CTM.

It also highlights the lessons learned from this particular pension credit collaboration.



Do you live in Rhondda Cynon Taf, Bridgend or Merthyr Tydfil?
Find out about claiming Pension Credit and local events

What is Pension Credit?

Pension Credit is a weekly benefit to boost your income. You can apply online, by phone or by completing a form.

If you claim Pension Credit, you can usually get extra help with the cost of living – like Winter Fuel Payments, a Budgeting Loan or a Council Tax Reduction.



Key communication and engagement considerations (principles):

Ensuring the right representation when embarking on a communications and engagement project, it is important the right people are involved from the outset. Having a communications expert available is essential, however it is also important to ensure those with the right knowledge and understanding of the area, audience and project can help frame the approach and feed in key insights from the beginning. For example, it is a good idea to involve frontline staff or people with lived experiences who can advise on channels, resources, messaging, and accessibility. Having the right representation will provide a solid foundation for a communications strategy and planning.

Early agreement on the communications strategy and plan establishing a clear communications strategy at the beginning of the project ensures that all partners are on the same page. This includes identifying shared outcomes and objectives (SMART), budget, target audiences, defining key messages, and setting expectations for how information will be shared by all supporting partners. Agreeing on roles, responsibilities, and decision-making processes helps to avoid miscommunication and any possible delays. A helpful communications planning framework, called OASIS, is available [here](#). If a behaviour change approach is needed, it is also recommended to use the COM-B model, available [here](#).

Agreeing a digital media approach (including social media)

With a large percentage of the population now using digital media, including social media, as either a first / key information source, agreeing a coherent digital media strategy at the outset is equally crucial in reaching audiences - both residents and stakeholders alike. Deciding on platforms, messaging, and frequency of posts and coordination of the digital plan (including social media posts) should be discussed upfront to ensure consistency and alignment.

Budgeting for communications

Ensuring adequate budget allocation for communications and engagement activity ensures that necessary resources are available; from graphic design materials to support with social media, community engagement activity (including events management) and social media advertising to target audiences and communities (where relevant).

Utilising media to boost the partnership / project profile

Media engagement is a powerful tool for amplifying the profile of a partnership and project purpose. It can also can significantly expand the project's reach by elevating visibility. By positioning key spokespeople for interviews and securing press releases, the project gains broader attention, fostering public interest and encouraging greater stakeholder involvement. A well-executed media strategy can also help to attract additional support or even funding.



Lessons Learned

Early alignment is crucial

Whilst this strategic partnership grew at pace and organically, it would have been strengthened by prioritising early discussions around communications and engagement, to align on communication objectives, approaches and roles and responsibilities– for optimising the project's impact.

For example, it was a few weeks into the project before Citizens Advice (RCT) was agreed as a central third sector partner (amongst the partners) for hosting online information about all the community engagement events happening across the region. This was in addition to all the partners agreeing to promote any events local to them on their own platforms. For any future collaborations, this decision would be best made at the outset of the project, during the planning phase.

CTMUHB and the CTM Regional Partnership amplified the event opportunities via regional communications.

Continuous monitoring and feedback

The project team built in mechanisms to identify areas for improvement (at a project level) and to ensure the project remained on track. However, from a communications perspective, a strengthened approach to communications would also include the ongoing monitoring of communication efforts and capturing public and stakeholder feedback on an ongoing basis.

Utilising media to boost partnership profile

For boosting the project's profile with local and national media (print and broadcast), the project would have benefitted from having access to a case study i.e. a communications package available for sharing with media. The absence of this limited the opportunity to engage media during the 'live' delivery phase of the project.

However, positively, local coverage was obtained via the health board's monthly 'health slot' with GTFM radio, which involved a dedicated pensions credit interview with Age Connects Morgannwg (Rachel Rowlands) and Citizens Advice, RCT (Karen Taylor) on Friday, 10 January 2025.

The success of this interview created a further opportunity for another feature on wider support available for older people in CTM seeking independence at home (led by Care and Repair) , including energy efficiency opportunities – Older Not Colder campaign. This feature was aired on Friday 21 February 2025 and involved Nerys Rees and Claire Miles as key spokespeople.

Both interviews were shared on all CTMUHB social media platforms, and promoted in staff and stakeholder newsletters. Work to gather case study materials is ongoing within the project team.

Conclusion

Whilst a communications approach was developed to support this important health and third sector partnership, given the sale of partnership working, the recommendation is that any future partnership builds in communications and engagement at an earlier stage in the planning process going forward. This is to support with clear planning, agreeing a cohesive digital, events management and media management (where relevant) – plus to support with overall coordination. This approach would ensure the project's impact is maximised, as well as promoting the strength of the strategic partnership.

KEY LEARNING POINTS

Deliver Outcomes

Our initiative successfully delivered outcomes by actively enhancing awareness and uptake of Pension Credit among our target audience. However, we identified a significant area for improvement, the need for a more proactive approach. Due to the tight timelines associated with applying for the Winter Fuel Allowance, which concluded in November, much of our strategy was reactive. Moving forward, it is essential to learn from this experience. In preparation for this winter, we will ensure a solid plan is in place as part of our business as usual. This will allow us to operate proactively, rather than reactively, ensuring preparedness and maximising the impact of our outreach efforts

Create Value

The project fostered a spirit of collaboration, highlighting a shared willingness among all partners to work together and pool resources. This collective effort was driven by a mutual desire to assist our communities' residents. The commitment and enthusiasm from everyone involved created significant value, demonstrating the power of collaborative action.

The Art Of The Possible

Our initiative exemplifies the art of the possible, illustrating the remarkable achievements when diverse organisations unite with a common purpose. By harnessing our collective strengths, resources, and financial inputs beyond just the time of the professionals involved, we've showcased how existing structures can be creatively utilised to deliver exceptional results. This collaboration should be celebrated, especially as we navigate a tight financial climate for the NHS. There's significant learning to be shared about achieving ambitious goals under such constraints. One standout aspect is our ability to mobilise quickly, thanks to the robust, pre-existing relationships among the stakeholders. This strong and effective baseline for collaboration served as a powerful Launchpad, enabling us to achieve our objectives with great speed and efficiency.



RECOMMENDATIONS



I have been really worried during the process that my application would be declined. The cost of living has impacted on me so I am thrilled that it has been awarded. I have help from my family with practical tasks at home and I like to help them by buying additional shopping items that we can share.

Clear Referral Pathway for the future utilising communications

Establish a clear communications strategy at the project's start, covering SMART objectives, budget allocation, target audiences, key messages, and expectations on information dissemination. Use planning frameworks like OASIS and, if applicable, behaviour change models like COM-B.

Data Linkage – can we embed and make business as normal

Use data-driven decision-making practices to identify individuals eligible for additional benefits. By standardising this approach, we can ensure consistent identification and outreach to the right demographics for support, integrating these methods into regular operations.

Collaborative Group to provide oversight and leadership

To provide clear guidance and structure for the Collaborative Group overseeing the project, it is recommended to create a comprehensive Terms of Reference (ToR) document. The ToR will serve as a foundational guide, detailing the group's purpose, structure, and operating procedures.

Business/Future Plan – sustainable and planned approach – governance & Funding

To ensure long-term viability and strategic coherence for the partnership, it is recommended to create a comprehensive Business and Future Plan. This plan should address sustainable growth, governance structures, and funding strategies.

Explore Social Return on investment

Refer to appendices one and two; these case studies highlight significant income gains and improved well-being outcomes resulting from benefits advice and application assistance. Quantifying these benefits demonstrates the value of these initiatives, supporting future funding requests and justifying resource allocation. Our case studies provide compelling evidence of how Pension Credit has transformed lives within our community, enabling pensioners to afford better heating, healthier food, and engage more in social activities, thereby enhancing their overall quality of life. By presenting both statistical data and personal stories, we can effectively illustrate the profound impact of these programs, emphasising the importance of continued and expanded support services for pensioners across CTM.

Highlight further Un-attended benefits

This project has revealed significant, unexpected benefits from collaborative efforts in community engagement and support services. A notable outcome is the upskilling of two administrative staff members, now capable of providing benefits advice and conducting phone benefits checks. Their training has allowed them to efficiently identify entitlements, including Attendance Allowance and Carer's Allowance, freeing specialists like Fleur and Bethan to focus on more specialised tasks and improving service delivery. The additional funding facilitated increased hours for events and consultations, boosting overall effectiveness. Professional development has also enhanced the confidence and capabilities of these new advisers.

Furthermore, this project has expanded its impact into areas like falls prevention and wider access to various benefits, showcasing the broad-ranging effects of our integrated efforts. The initial event at Cynon Linc was highly attended, drawing over 100 participants, with many responding to a traditional mail-out. This underscores the effectiveness of traditional mail in reaching demographics less engaged with digital platforms. Planning another mail-out before next winter could enhance client interaction, ensuring they don't miss out on potential income opportunities. Additionally, the increased uptake of Attendance Allowance highlights how thorough communication strategies can contribute to better financial outcomes for the community.



“
I am very pleased with benefit awarded to me - even though the money is not being used for anything in particular its nice to know that its there should it ever be needed and grateful for the support with the application as I didn't know it was available.
”

IN SUMMARY

Putting our population in the centre of decision making and working collaboratively to achieve the intended outcomes crossing traditional organisation boundaries and budgets demonstrated the power of collaborative action in addressing the gap in Pension Credit uptake among eligible individuals. By identifying and supporting a significant number of clients, the initiative has led to substantial confirmed and anticipated income increases. The project highlighted the importance of targeted interventions, effective communication strategies, and the integration of data-driven decision-making into routine operations.

Collaboration with organisations such as Care & Repair has been instrumental in addressing both health and housing needs, ensuring that patients across CTM understand the benefits of good housing and its impact on their health outcomes. Moving forward, efforts should focus on optimising service delivery through clear referral pathways, expanding communication strategies, and exploring new ways to engage and raise awareness among pensioners. While the initiative has made significant progress, considerable work remains to support those who still need assistance from the multi-organisational team



“
My health has physically deteriorated since hospital discharge. I have a long-term package of care in place and the additional income received from Attendance Allowance means that my care needs can be paid for comfortably without any negative impact on my savings.
”

CASE STUDY 1



PERSON COMPLETING CASE STUDY:
 Fleur Williams
CONTACT DETAILS:
 sarah.smith@acmorgannwg.org.uk
DATE OF CASE STUDY:
 25/11/24
NAME OF PROJECT:
 I & A

Does this Case study relate to an:

Individual or family <input checked="" type="checkbox"/>	Assistance <input checked="" type="checkbox"/>
Information/ Advice <input type="checkbox"/>	Other <input type="checkbox"/>

Background

Mrs T called into the Cynon Linc, her husband has Dementia and they were not claiming any Benefits and had no entitlement to any income based benefits, I applied for Attendance Allowance which was successful at the higher rate **£108.55 per week**, they could then claim Severe Mental Impairment deduction on the council tax to have **25%** reduction which was **£36.45 per week**, finally I applied for a Blue Badge which was successful which meant Mrs T could Park closer to the hospital so she didn't have to leave her husband and the main entrance and try and find a parking space.

What outcomes/ changes have been achieved?

They had increased weekly income of **£145** per week which was going to help them to pay their increased energy bills this winter.

I helped them to obtain a **Blue Badge** which made life more convenient for the couple when attending hospital appointments.

Next Steps

Clients will return if they have any further queries.

Quotes/Feedback

We are so glad that we came to see you, getting a Blue Badge has been a Godsend and the extra income means we don't have to worry this winter.

CASE STUDY 2



PERSON COMPLETING CASE STUDY:

Karen Taylor

CONTACT DETAILS:

Karen.Taylor@carct.org.uk

DATE OF CASE STUDY:

27/02/2025

NAME OF PROJECT:

Story of Mr A

Does this Case study relate to an:

Individual or family



Information/ Advice



Assistance



Other



Debt help

Background

The Client, Mr A had reached retirement age and had to give up work due to number of long-term health reasons, which left him feeling overwhelmed with welfare benefit options due to his medical conditions and felt confused about what he was entitled to. Mr A was receiving a small lump sum from his pension, working the last five years in the UK, however, Mr A had no other income besides this and was using credit cards to pay for everyday essentials and left him unable to continue paying for his bills.

During the first contact, a benefit check was conducted on the client’s behalf, which informed him of his eligibility for pension credit, housing benefit and council tax reduction. With support, Mr A applied for these benefits, with continued support from the adviser on a Casework basis. Mr A attended our services again for support in understanding the letters and information received from RCT council in relation to his claims and arrears. We supported the client to arrange a payment plan with the council for his council tax arrears and answered any queries regarding the benefit applications. As a result of our advice and support, the client was awarded these benefits.

What outcomes/ changes have been achieved?

The intervention relieved Mr. A from financial stress, increasing his income and securing entitlements essential for his well-being. It provided a more financially stable living situation, allowing him to manage his expenses better and reduce his reliance on credit cards.

- Conducted a benefit check.
- Guided Mr. A through benefit applications.
- Offered ongoing support and advised on financial correspondence.
- Arranged payment plans for debt and cleared Council Tax arrears.
- Mr. A now receives **£11,343.80** in Pension Credit annually, with a back payment of **£3,490.40**.
- He receives full Housing Benefit and a Council Tax Reduction amounting to **£4,487.60** and **£1,037.92**, respectively.
- Eligible for **£350** in support through the Warm Homes Discount and Winter Fuel Payment.

Next Steps

We plan to use the insights gained from Mr. A’s experience to refine our outreach and support strategies, ensuring more individuals can navigate benefit applications effectively.

Quotes/Feedback

*We have continued to provide wrap-around support for this client and have internally referred him to our specialist debt advice team. The client is currently working with our team to help create a budget and work through other non-priority debts. Mr A was very grateful for the support. He said, **“it’s such a relief to start having some money coming in again! Thank you very much for your help”**.*

CASE STUDY 3



Bridgend County Care & Repair
Gofal a Thrwsio Sir Pen-y-bont

PERSON COMPLETING CASE STUDY:

Kelly Williams

CONTACT DETAILS:

Kelly.Williams@bridgendcareandrepair.co.uk

DATE OF CASE STUDY:

2024 - 2025

NAME OF PROJECT:

Story of Mr X

Does this Case study relate to an:

Individual or family

Assistance

Information/ Advice

Other Hospital 2 Home Service

Background

Mr X's was referred into Bridgend County Care & Repair's Hospital to Home Service following admission to hospital after experiencing a cardiac emergency. Mr X, who is in his 80's, lives with his wife in their own home. Mr X has hearing loss, diabetes, reduced kidney function, shortness of breath, previous by-pass, anxiety, pain and has a falls history. Mr X was visited at home the day after discharge. Both Mr & Mrs X were offered an assessment. Visit outcomes as follows:

- Benefit check and assistance with benefit applications; Attendance Allowance x2, Carers Allowance, Pension Credit, Council Tax Benefit; Telecare Lifeline installation for both Mr & Mrs X; **Referral to the Fire Service**; Priority register discussion (gas and electric); Refuse assistance referral; **Grant for a stair rail** to promote independence and reduce falls risk; **Grant for galvanised rail** to front access promote independence and reduce falls risk; **Grant for a Ring doorbell** to reduce anxiety around safety and security; **Referral to Community Occupational Therapist** for access and bathing assessments which resulted in bathing equipment and access to rear of house made safer to allow access to outside WC; **Letter to the GP with regards to falls**; Advice on tinnitus and grant for tinnitus reliver; Grant for lighting ' Signpost to audiology; Falls folders provided and Repair to sink

What outcomes/ changes have been achieved?

- Income maximisation **£466.54** weekly with **£10,292.12** in back payments (inc. Pension Credit, Winter Fuel Payment, double Attendance Allowance, Council Tax Reduction, TV License...)
- Grant works cost estimated **£4,000.00**
- Technology grant estimated **£500.00**
- Now living in a warm, safe home
- Digital inclusion
- Promoted independence and reduced risk of falls
- Less reliance on family/carers
- Reduced risk of re-admission to hospital

Next Steps

It is crucial to continue supporting individuals like Mr. and Mrs. X. We remain committed to collaborating with our colleagues in the health board and other organisations to reach out to more people in need.

Quotes/Feedback

Fantastic, helpful, polite & very caring;

A big thank you for all the help.. A credit to your company...Thank you;

Living rather than existing;

If it wasn't for you, we would never have done this!...

CASE STUDY 4

BAVO

Bridgend Association of Voluntary Organisations
Cymdeithas Sefydliadau Gwirfoddol Pen-y-bont ar Ogwr

PERSON COMPLETING CASE STUDY:

Gail Devine

CONTACT DETAILS:

gaildevine@bavo.org.uk

DATE OF CASE STUDY:

13/03/2025

NAME OF PROJECT:

Community Navigation

Does this Case study relate to an:

Individual or family

Assistance

Information/ Advice

Other

Background

Mr Jones is a gentleman in his late 70s who lives alone. He has been supported by Community Navigator in the past to access support and practical help with domestic chores and gardening. Mr Jones contacted the Navigator in December 2024 for signposting to a cleaner for his home.

During the telephone conversation Mr Jones commented on the media interest around the Winter Fuel Payment and Pension Credit. He wasn't sure if it was for him. Navigator explained the changes to eligibility and offered to explore options with him. Having gone through the eligibility criteria over the phone with Mr Jones, the Navigator agreed to visit and support Mr Jones to apply online.

Community Navigator support was around digital inclusion - support to apply online and upload required documentation. In January, Mr Jones was informed he had been successful in his application, meaning he received:

- Pension Credit back dated to July 2024
- Winter Fuel Payment
- Free TV Licence (also supported to apply online)

What outcomes/ changes have been achieved?

Monthly income increased by **£109** reduction in Broadband costs, switch to social tariff as in receipt of Pension Credit. Over **£1000** paid in back dated Pension Credit payments and TV licence rebate Over **£1000** paid in back dated Pension Credit payments and TV licence rebate, monthly income increased by **£109** and a **reduction** in Broadband costs, switch to social tariff as in receipt of Pension Credit.

Next Steps

Mr Jones will contact Navigator if further support is needed as he has done previously. Low level digital literacy support and signposting important for individuals to access and apply for benefits they are entitled to.

Quotes/Feedback

I couldn't apply for Pension Credit without the Community Navigator's help, I didn't know where to start especially with the computer.

I appreciate the work you have done for me..It's has made a huge difference. I know I can contact you if I need any help in the future.

Thank you so much!

CASE STUDY 5



Cwm Taf Care & Repair

PERSON COMPLETING CASE STUDY:

Melanie Kaler

CONTACT DETAILS:

nwilliams@cwmtafcr.org.uk

DATE OF CASE STUDY:

03/03/2025

NAME OF PROJECT:

Story of Mrs H, 80 yrs old

Does this Case study relate to an:

Individual or family

Assistance

Information/ Advice

Other

Background

Mrs H was referred to our Hospital to Home Case Officer Melanie to support a safe discharge from Prince Charles Hospital. Trauma and orthopaedic occupational therapist completed referral as Mrs H was under hip precautions following surgery to repair fractured hip following a fall at home. A visit was made on 3rd January 2025 where I met with the clients son for access to the property. Work identified:

- High front threshold step – bilateral grabrails installed to support access and prevent falls.
- Ground floor living was set up with client receiving family support x 3 daily to manage tasks at home.
- Ground floor shower room, anxious re: accessing shower. 9.5" step into shower tray. Non slip bath step, shower seat and grab rails installed to support client
- Referral to adult services at RCTCBC to request COT assessment for larger adaptations (LAS).
- Raised toilet seat and frame in situ, client reported this makes completing personal hygiene challenging - grab rail to right tiles wall.
- Attendance Allowance applied for and has been successful maximising our client's income by **£3,777.80** per annum and a back payment of **£435.90** awarded to Mrs Hooper.
- Smoke detectors in situ, and client on priority services register in the event of an emergency.

What outcomes/ changes have been achieved?

The intervention has supported our client home from hospital with a safe discharge and interventions installed in her home will prevent re admission and reduce the risk of any future falls. Mrs H is pleased she can continue to remain as independent as able within her own home.

Mrs H's increase in income because of a successful benefit claim has reduced worry and stress on our client's ability to remain living independently and have greater choices about the way she lives day to day.

Next Steps

This case study includes results and outcomes of all clients visited by Cwm Taf Care & Repair.

Quotes/Feedback

I'm really pleased with the extra income as it means I can go out with my son more frequently and participate in social activities to improve my quality of life.

I have always been quite worried about finances; this takes the pressure off me considerably.



GIG
CYMRU
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Bwrdd Iechyd Prifysgol
Cwm Taf Morgannwg
Cwm Taf Morgannwg
University Health Board



CREATING
HEALTH



IMPROVING
CARE



INSPIRING
PEOPLE



SUSTAINING
OUR FUTURE

Diolch

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