

Managed Migration Update

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Authority: UC Programme Board

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Paper for discussion

UCPB140612 – Paper 6

OFFICIAL SENSITIVE

Main objective

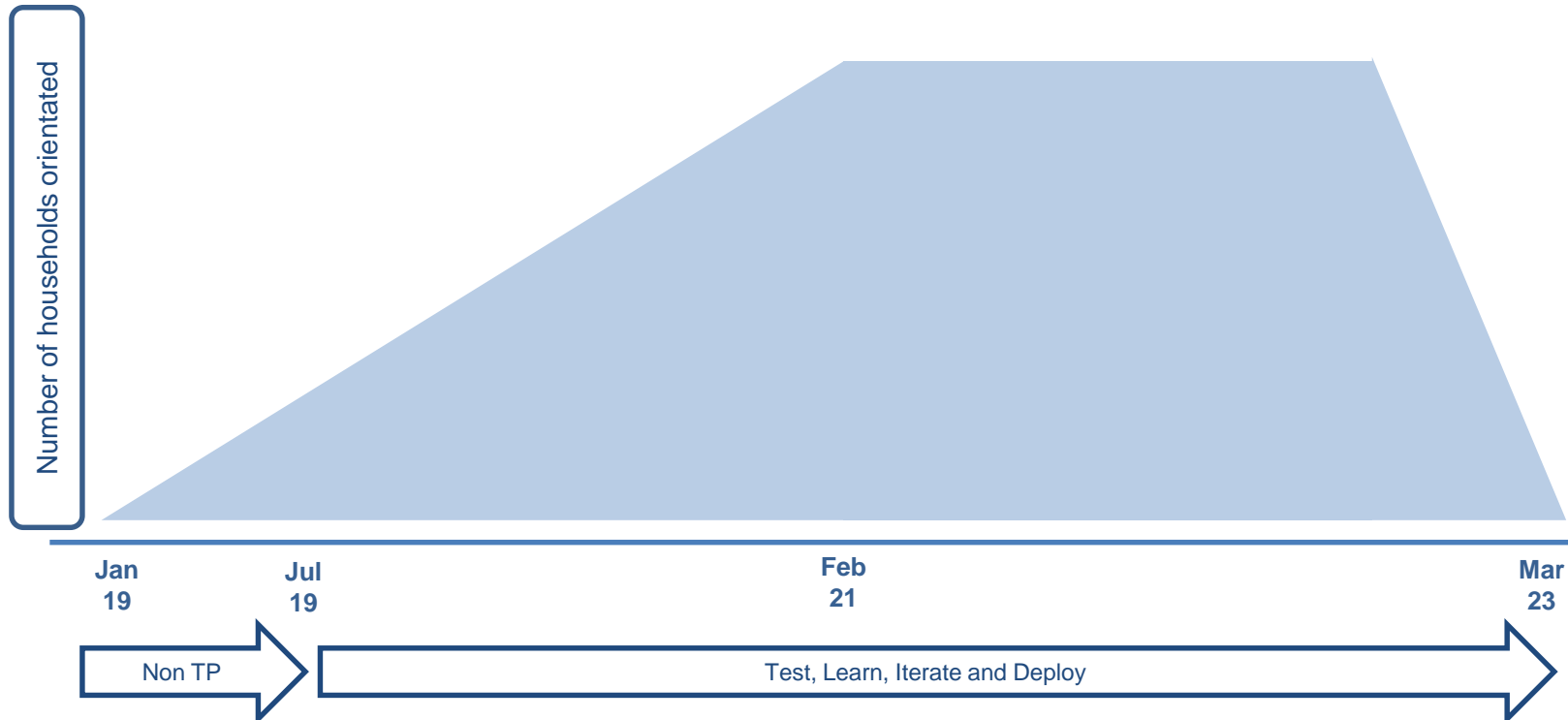
- To update Programme Board on progress since December 17 including activities to identify, impact and prepare for Managed Migration Beta testing from January 2019.
- This paper covers:
 - Update since December 2017 Board presentation
 - High level E2E timetable
 - Strategy and Planning
 - Mobilisation
 - Organisation
 - Beta Entry Criteria
 - Preparation for Beta testing

Managed Migration – Summary

- We are planning to commence managed migration in **January 19** with an initial beta test phase. The planned end date for completion of migration is now **March 2023** (subject to final agreement with HMT).
- Changes for claimants who receive the ‘Severe Disability Premium’ (SDP) on legacy benefits have added significant new features to the UCFS development backlog. To manage this additional work, delivery of the Transitional Payment (TP) calculator has moved to July 2019
- Ramp up of migration caseload has been adjusted to accommodate the changed delivery schedule for the TP calculator with a reduced start-up volume, slower incremental growth and lower monthly totals to March 2023
- The enabling legislative timetable has been adjusted as a consequence of the SDP policy changes with a presentation of draft regulations to SSAC on June 20th and legislation enacted by January 2019
- The following slides provide an update on the timetable and key work areas

Managed Migration – High Level Outline Timetable

- The High level outline timetable starts with a Beta phase in January 19 based on identifying and migrating non Transitional Protection cases with the ability to change or amend the award in the Full Service available from around July 19
- The timeline will also be informed through learning together with prioritisation discussions (eg 19/20 Efficiency Challenge and Policy Changes)

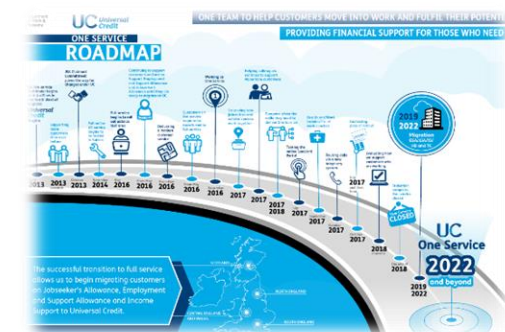
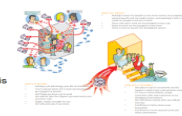


Managed Migration – Strategy and Planning

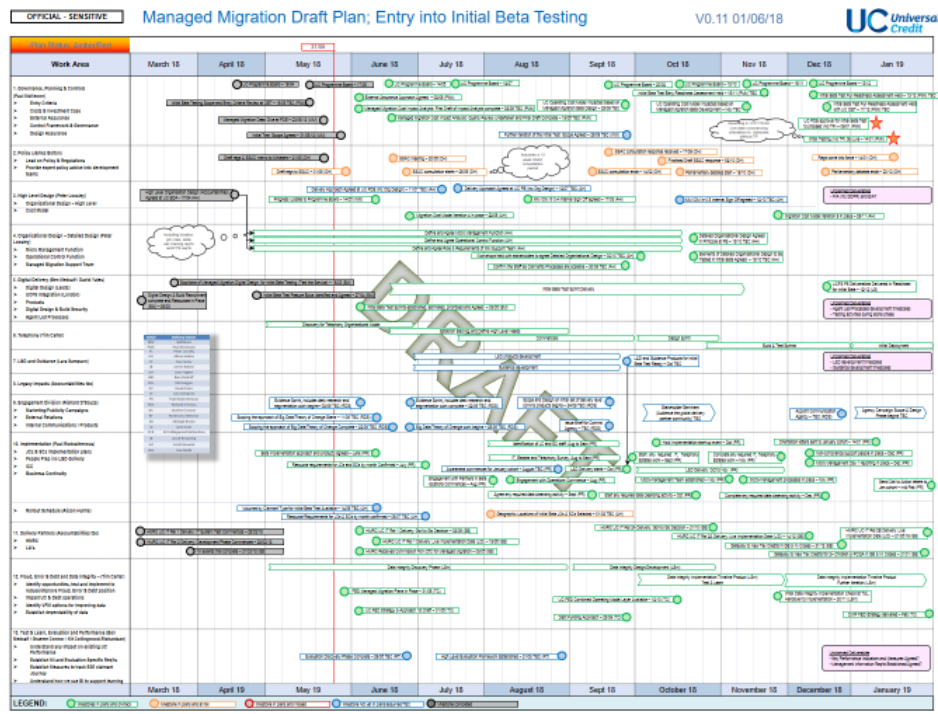
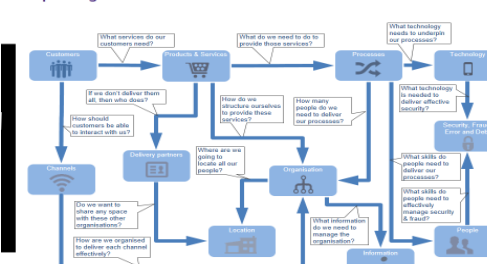
- Detailed planning is maturing for the commencement of Beta. The planning context needs to be driven by the vision and success factors, One Service organisation & Operating Model

Vision and Critical Success Factors

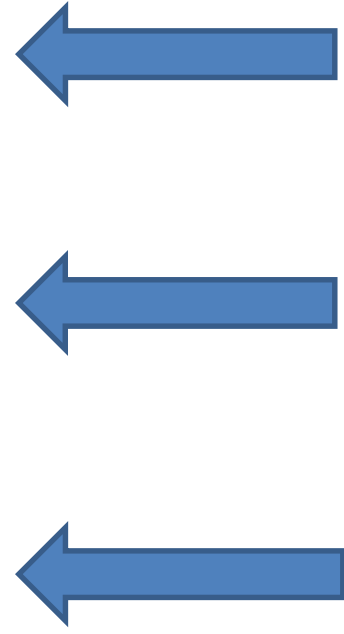
- Increase earnings of people on low incomes and reduce the number of workless households and those in poverty (by substantially improving work incentives and addressing the perception that work does not pay)
- Ensure that the number of children and adults in poverty are lower than they otherwise would have been (in particular because of increased take up)
- Reduce administration costs
- Reduce fraud and error
- Maximise self service and process automation
- Deliver a benefit system that is easy for claimants, agents and third parties to access, understand and have confidence in (because it is simpler and fairer)
- Provide a platform that enables modern welfare service delivery that is efficient, effective and scalable
- Delivers full employment delivering 200k additional entrants into the labour market once fully implemented
- Minimise the disruption to recipients and organisations during the transition to Universal Credit



Operating Model



Strategic Inputs



Detailed Planning Inputs to Commence Beta

- High Level Scope of the Beta MVP in January 2019 (Draft)
- The MVP Beta scope comprises a number of Digital and Operational Services as follows:
 - Migration Orchestration Service** – Capability to select legacy claimants to be migrated and orchestrate their end to end migration, closing their legacy claim and supporting move onto UC
 - Migration Notification Service** – Capability to contact claimants through letters, phone and SMS as part of the managed migration process
 - TP Calculation/Eligibility Service** – Calculation of Transitional Protection (TP) so that those with TP can be excluded and not migrated enabled by
 - Access to Legacy Award, Claimant Evidence Information and Contact Data** – Access to legacy DWP, HMRC, LA award information together with underlying claimant evidence information via Data Warehouses
 - Access to the UCFS Calculator** (through either an API or by providing a copy of the UCFS calculator) to determine normal UC award using legacy claimant evidence information.
 - Migration Enquiry Service** – Capability to manage enquiries from claimants during the migration process (initially including changes to legacy services to handle enquiries)
 - Operational Team** – Mobilised in one jobcentre and one dedicated Service Centre team within reasonable travel of Leeds One

- Entry Criteria – Beta non-Transitional Protection January 2019 (Draft)
1. The managed migration process will be assessed using a qualification and prioritisation process which is governed through the Programme's governance structures. To assess readiness the Programme will verify the following entry criteria:
 - 1.1. Policy and system requirements are complete and effective. Any issues are resolved by the start of the beta test.
 - 1.2. Processes (digital & agent led) are built to comply with TP guidance and provide end to end booking of the claimant on to the managed migration service from end to end. This includes:
 - 1.2.1. The managed migration process is complete, up to date and follows the beta test plan.
 - 1.2.2. The managed migration process is complete, up to date and follows the beta test plan.
 - 1.2.3. The managed migration process is complete, up to date and follows the beta test plan.
 - 1.2.4. The managed migration process is complete, up to date and follows the beta test plan.
 - 1.2.5. The managed migration process is complete, up to date and follows the beta test plan.
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- Entry Criteria – Beta non-Transitional Protection January 2019 (Draft)
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Managed Migration - Mobilisation

- The most significant challenge in the Managed Migration Programme is the mobilisation of 4 million claimants: to ensure that claimants respond to communications from DWP by making a claim to UC at the right time
- The mobilisation campaign will
 - Develop segmentations and approaches based on the 19 possible legacy benefit combinations
 - Base its approach on testing evidence
 - Exploit all current relationships and contact points
 - Learn lessons learned from previous mobilisation exercises
 - Work closely with 3rd party delivery organisations (eg CAB, MIND, Landlords etc) to develop joint communications – recognising that claimants may have higher levels of trust in these organisations
 - Test the accuracy and robustness of our contact data
 - Develop a repetitive and multichannel approach
 - Engage the services of an external agency

Appendix A for plan

Managed Migration – Organisation

- Director for Managed Migration in place supported by dedicated UC Programme team and significant resources from Digital, Operations, Policy and other areas
- The (draft) organogram shown at Appendix B sets out the new structure for the Managed Migration Programme
- Building on the success of UC Full Service approach the organisation is based on the model of empowered teams developing product on the basis of a test and learn approach
- The team blends together representatives from Operations, programme, product, policy, HMRC, comms, legacy together with representatives from 3rd party delivery organisations

Managed Migration – High Level Beta Entry Criteria

The Objective of the Beta Phase is to test, learn and improve the initial Managed Migration Service and understand claimant behavior through a Minimum Viable Product in a live environment.

Readiness will be assessed using a repeatable and proportionate process through standard Programme governance and will assess:

- End to End Digital and agent led processes provide an effective test, have been assured by key stakeholders and are in place and ready
- We have the legal authority to migrate legacy claimants to Universal Credit and terminate their entitlement to Legacy Benefits
- The initial Beta site preparation and readiness is complete and our People and Delivery Partners are ready
- The Managed Migration Beta Test Service is secure
- Our Delivery Partners and stakeholders have been consulted and are ready
- Test measures have been agreed and mechanisms for gathering and reporting all relevant information are in place

Managed Migration – Preparation for Beta Testing

- So far we have completed:-
 - Early, low volume, testing of MM engagement process (Thorne JCP)
 - First pass of Beta test entry criteria including test site identification (subject to agreement with Operations)
 - A story map identifying key development features and candidate phases
 - A refresh of the assumptions, dependencies, risks & issues and governance arrangements
 - A test of automated letter production (2000 letters sent as part of Live to Full transfer process)
- The plan shown at Appendix C sets out the next steps to commence Beta testing in January 2019. The plan incorporates:-
 - Legislative timetable
 - Operating Model including Organisation Design
 - Agreement of Beta scope and test sites
 - Development of the TP calculator and testing data integrity/availability

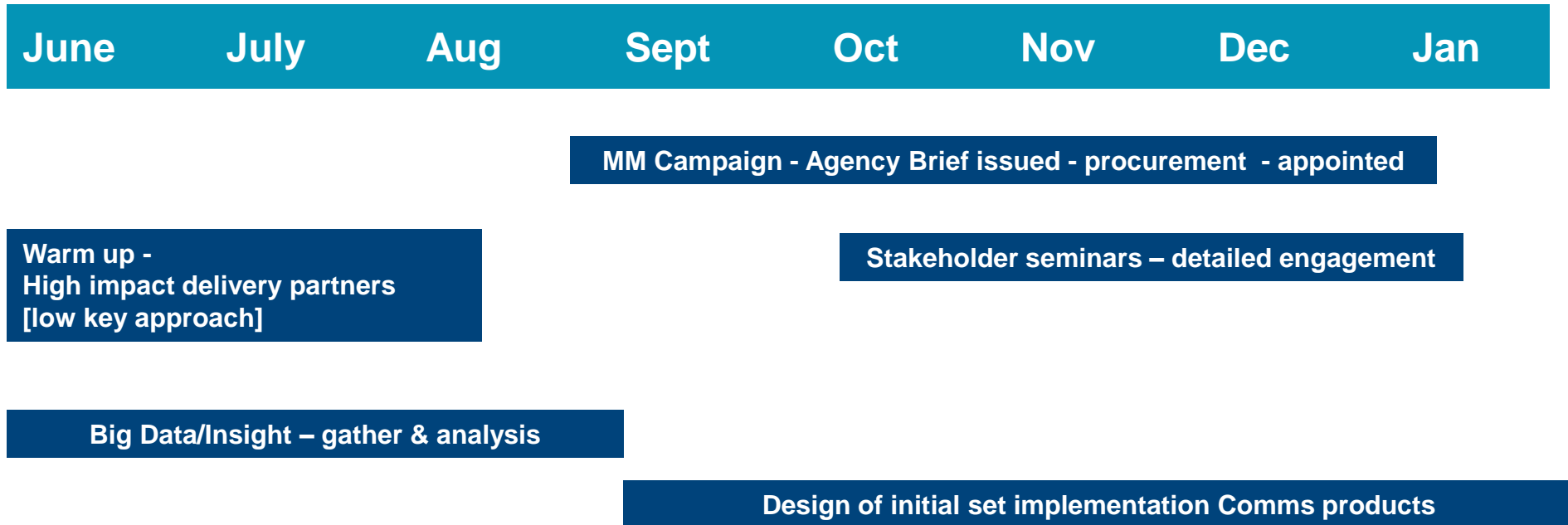
Decision Required

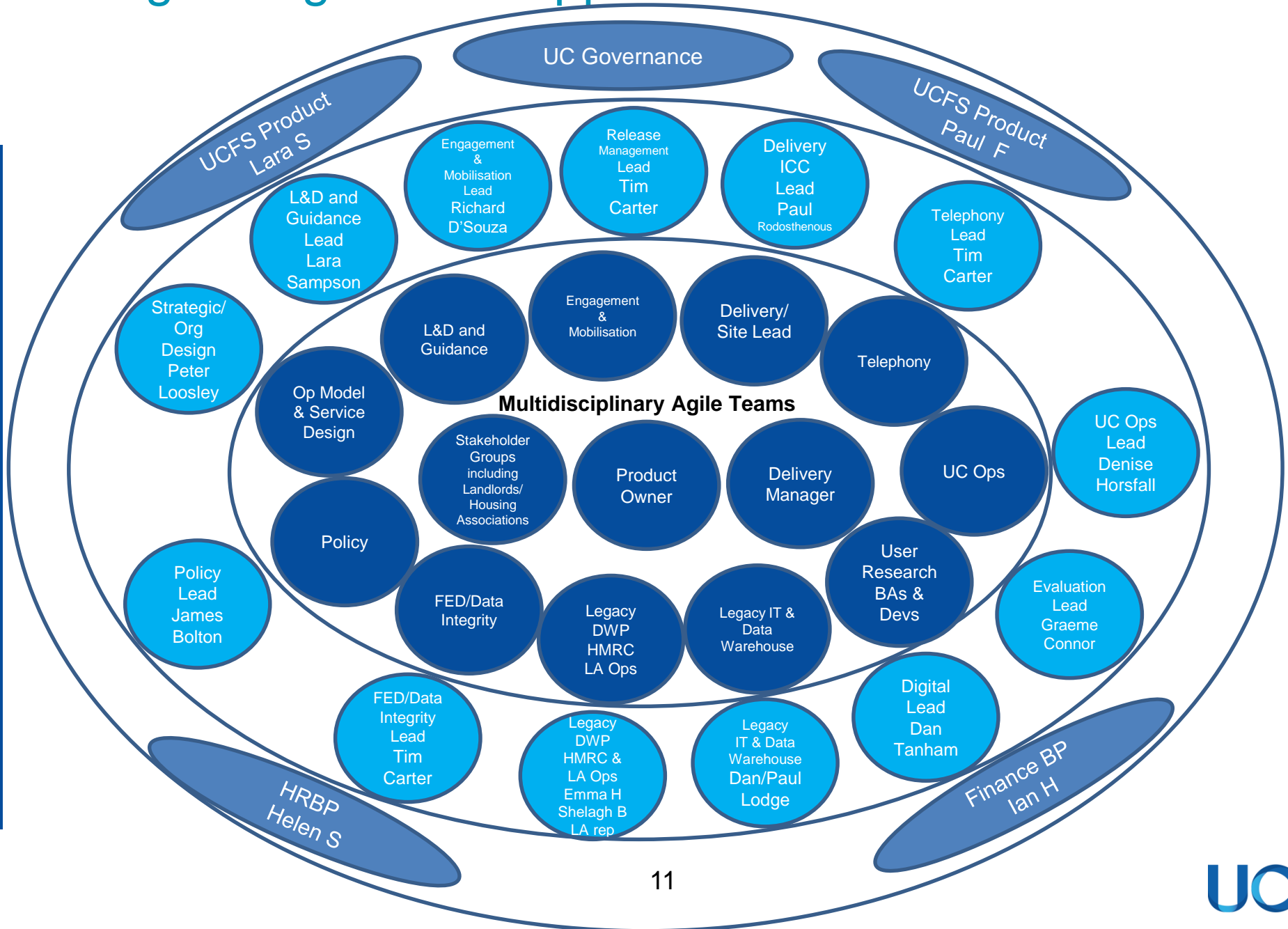
UC Programme Board are asked to:

Decision	Approved
Note that Regulations have been agreed with Ministers and the legislative process instigated with a public announcement made on 7 June	
Note that further analysis on the rollout timetable completed and extension of the migration period to 2023 agreed with all stakeholders	
Note that the Managed Migration Directorate formed with significant additional resources deployed, further early testing and user research has been completed with claimants and we have started development of the Beta test phase approach and planning	
To endorse our view that although there are significant challenges ahead the Programme has laid good foundations for further progress	
To provide any steers on areas of concern or risks that may arise as we start detailed preparations for Beta testing in early 2019	

Managed Migration – Appendix A

Draft mobilisation plan

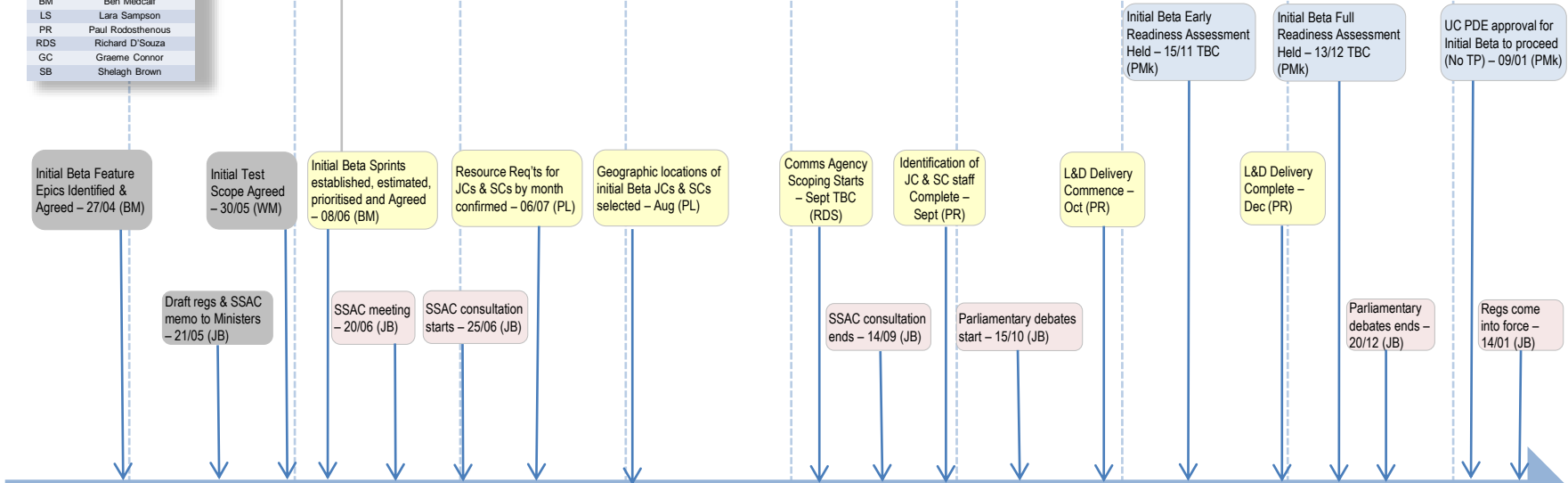
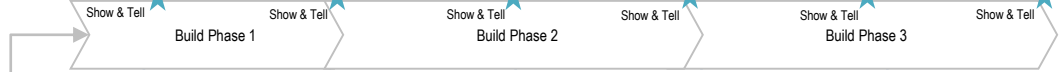






April May June July August September October November December January

Initial	Delivery Owner
WM	Will Moss
PMk	Paul McKeown
PL	Peter Loosley
TC	Tim Carter
JB	James Bolton
BM	Ben Medcalf
LS	Lara Sampson
PR	Paul Rodosthenous
RDS	Richard D'Souza
GC	Graeme Connor
SB	Shelagh Brown



- KEY:
- POLICY
 - GOVERNANCE
 - DELIVERY & IMPLEMENTATION

Key Planning Assumption:
 - UCFS TP Calculator (& Erosion Functionality) to be delivered in P7 UCFS backlog (December 2018 to June 2019)

