



Meeting:	Universal Credit Programme Board
Date:	30.05.24
Location:	Caxton House Room 6:24 Microsoft Teams
Attendees:	John McGlynn (Chair), Neil Couling (UC SRO), Ian Wright (UC Programme Director), Helga Swidenbank and OBO Barbara Bradley (MtUC Operations Director), Sharmini Selvarajah (External Affairs, Strategic Design and Planning Director), [REDACTED] OBO Myrtle Lloyd (HMRC Director), [REDACTED] OBO Mari Roberts-Wood (Representative for Reigate & Banstead District Council), Lorraine McGuirk (PC&P Director), Chris Thorn obo Richard Corbridge (Interim Digital Director for Working Age Services), Marcus Mason (HMT Deputy Director), [REDACTED] (Cabinet Office/IPA), Paddy Rooney (Deputy Director, Work and Health DFC NI), Graeme Connor OBO Angus Gray (UC Policy Deputy Director), Louise Skelton (Finance Director), [REDACTED] (Observer), [REDACTED] (Observer), [REDACTED] (Observer), [REDACTED] (Observer)
Presenters:	Ian Wright, Helga Swidenbank, [REDACTED] (MtUC Service Leader), [REDACTED], Paddy Rooney, Lewis Childs (UC Head of Practice for Product Strategy and Design)
Apologies:	Barbara Bradley (Work & Health Services DG), Mari Roberts-Wood (Chief Executive for Reigate & Banstead District Council), Myrtle Lloyd (HMRC DG), Angus Gray (UC Policy Director), Richard Corbridge (Digital Director General), Will Garner (UC Product Director)

Welcome, Action Points & Matters Arising:

1. The Chair welcomed members and deputies to the meeting.
2. Minutes from the UCPB on 16.04.24 were cleared with no amendments requested.
3. It was noted that following their nomination minuted on page 3, the Bolton Discovery team were successful at the OPD awards and won a silver.
4. The SRO highlighted that following the announcement by the PM on accelerating ESA cases, the PAC Chair has written to the Permanent Secretary. 48 hours' notice of the change was provided to the PAC, stakeholders were contacted and there was a written ministerial statement on the 21 April.
5. The following action points were updated:
 - a. 20.02.02 – Closed.

Paper 1 – Programme Director Update – UC Programme Director

The following key points were highlighted:

6. The programme overall is rated amber.
7. Since the PM's MtUC ESA announcement on 19th April, the team has been thinking about ESA and ESA/HB cases and working through options.

8. Stakeholder feedback has so far been positive on bringing ESA forward. Comms and workshops have contributed to this.
9. Just under 82k Migration notices were sent in April, exceeding the 79k profile. May will also exceed the profile and is on track to send over 86k.
10. The issue with notices for couples has been rectified and couples notices are now being sent. The TP data latency issue has also been fixed.
11. The HB profile has gone from green to red as it has been delayed by a month, but this should not affect the overall programme profile.
12. Application for a grant extension for Help to Claim has been paused during the pre-election period. Everything is lined up to move quickly on this post-election with Investment Committee expected to approve.
13. Permission has been granted to continue with the MtUC marketing campaign.
14. A survey running on TC on why people weren't claiming has been stopped during the pre-election period but has had sufficient feedback to draw sensible conclusions.
15. There is a potential delay to the CA contract negotiation due to pre-election processes. This has moved to amber now from green.
16. Recruitment continues for TCR with 3,270 agents and start dates agreed for a further 250. This is expected to reach 3,900 by July.
17. TCR RA has been signed off by HMT and is with the Perm Sec to decide whether it can go ahead now or needs to wait for post-election.
18. All RA milestones are now at risk as a result of the above.
19. MTUC risk will be reviewed and updated following the ESA decision. A paper will be brought to PB in June that will enable the digital recruitment issue to be closed off.

Discussion:

20. There may be some negotiations upcoming regarding funding levels for Help to Claim.
21. There are no legislative or regulatory related issues required for the programme pre-election. These were only needed for pension cases. However, legislation will be required later in the year to close TC.
22. ESA stakeholders are in favour of bringing ESA migration forward and can see the value of the programme – particularly the enhanced support journey. Their only real concerns are pace and support.
23. Workshops with stakeholders will now proceed post-election with charities, social landlords and LA's.
24. The PD accredited the stakeholder engagement team with the positive feedback received following the ESA and ESA/HB announcement.
25. The SRO thanked the teams for their hard work, highlighting that MtUC is going well because they are working incredibly hard right now given that there is a huge volume coming through the system.
26. Work on holding unencrypted data is progressing on track. 6 to 8 weeks was planned, and it is expected to take 7. It is highly likely to be complete by next PB.

Paper 2 – MtUC Operational Update – MtUC Operations Director, MtUC Service Leader, HMRC Director & Northern Ireland Representative

The Presenters guided attendees through the paper, highlighting:
DWP:

27. Just under 82k migration notices were sent in April against a profile of 79k. Claims continue at an even pace. Numbers show a dip in the number of claims on 22nd April, this is because claims are not counted in the update until ID has been verified.
28. There has been a steady increase in telephony with around 7k calls per day on the dedicated line for TP. Most of these are claimants seeking reassurance but around 15% want some detail around TP and some are looking to make a non-digital claim.
29. The team will start making outgoing calls soon as part of the enhanced customer journey. They will have additional training over the next few weeks following a trial in Notts.
30. Payment timeliness has dropped. There is a challenge with verifying 'People who live with you', the TP To Do will not show up until this is completed. The team are working hard to correct the drop in timeliness.
31. Some cases where customers have requested multiple extensions have been taken to ICC for guidance. A policy is needed on this going forward to solve this in a way that is supportive and scalable.
32. Work is underway to train the FRT team. It is important to have them as engaged as possible so learning will be consolidated F2F.

HMRC:

33. As of today, there are approximately 384k live TC cases left in the UK, with about 360k in GB.
34. For 5 consecutive months, the caseload has reduced by around 100k a month. This will drop off in June due to the low number of migration notices issued in March.
35. A data matching exercise has started across the Pension-Aged cohort and an additional 2,200 Pension Credit cases have been identified and will be updated before July, so these customers take the correct migration journey.

Northern Ireland:

36. 31k migration notices have been issued with 18k claims made and more to come. TC payees have not been as quick to respond to information as other claimants.
37. Some inaccurate stories emerging from the Advice Sector about the number of TC claimants that are not making UC claims are being addressed.
38. There are significant challenges to deliver Move to UC given an extremely constrained Budget position for 2024/25. At this stage, migration of TC is a priority and will be completed within current timelines, but Northern Ireland Representative could not guarantee, at this stage, that NI could deliver within future DWP migration timelines.
39. Ad campaigns that launched in NI on 20th May have had a positive response.

Discussion:

40. The Chair acknowledged that there is good progress being made across all three departments and highlighted the importance of the departments working together.
41. Work continues, to understand the emerging evidence around non claim rates. The SRO noted that TC caseload has reduced from 1.5 million in 2022 to 350k. There should be some learning from this which can be used for MtUC forecast.
42. The SRO acknowledged the budget challenges of NI and recommended exploring how DWP and HMT could support.

The following key points were highlighted:

- 43. There was an uptake in productivity in 23/24 performance. The benefits of this can be seen in the first month of the financial year with £19.8 million in AME savings.
- 44. Work continues with the Department to finalise the target for TCR. They're starting to feel fairly confident about how we are performing.
- 45. If RA has to wait until post-election, then that will be a delay which will have an impact on AME savings – more in future years than in this year.
- 46. The recruitment for agents has been challenging. It's going well but it is important to be sure progress continues.
- 47. A live site wide test of the handover process for RA has been conducted in Grimsby and Plymouth using one of the sites as a supplier. Results are expected soon.
- 48. The biggest risk to keep an eye on is that once RA goes live that it gets the support needed from wider DWP in terms of DMs for example.
- 49. Overall, in terms of core TCR, performance is good, and productivity is beginning to build. The downside is waiting for the decision on RA.

Discussion:

- 50. Savings projections for 24/25 are currently being discussed and are expected to be around £400 million.
- 51. The RA contractor will not be given an AME target as they can't make the final decision. Productivity measures will be set instead with quality checks in place. These will be worked back from AME savings.
- 52. A lot has been learned from TCR and there are several things in train to use that learning to put things in place to get better MVFE.

Paper 4 - MtUC Tax Credit Deferrals Plan - UC Head of Practice for Product Strategy and Design

The Presenter guided attendees through the paper, highlighting:

- 53. Deferrals could be people not entitled to UC, only entitled to benefit for a short period of time, or with circumstances that would make it inappropriate to migrate at this time.
- 54. Phased timelines have been established and risks/complexities identified by type of deferral to enable the team to notify claimants well ahead of TC closing down in April 2025.
- 55. The number of claimants who are terminally ill is unknown and often only apparent when they are invited to MtUC. These cases need to be handled with extreme sensitivity.

Discussion:

- 56. Mixed age couples are the largest group and cannot be brought forward due to regulations coming in June and more testing needed. An additional complexity for this group is that some will also be moving to Pension Credit. Several teams are working on this.
- 57. In cases where more than one deferral reason applies, each exemption would be dealt with in turn to ensure the migration is safe.
- 58. Alternative formats should be considered for these groups. Disability services have done some work they can share. This could be a positive story to share with stakeholders.

- 59. Deferrals are not expected to impact the MtUC forecast which is continually reviewed and readjusted. The official forecast is 79k per month and that is currently exceeded.
- 60. The SRO noted that getting to the end of the migration notices will inevitably uncover more complex cases.
- 61. HMRC will issue scans from October to find any remaining TC cases.

Action 01: The SRO, HMRC and NI teams to work together on a paper for Programme Board on a plan to be sure all TC migrations are migrated.

Paper 5 - Move to UC 24-26 Migration Plan – UC Programme Director

The Presenter highlighted the following key points:

- 62. Two options have been developed to deliver on ESA and ESA/HB MtUC. Both are to an extent placeholders and as with previous MtUC cohorts, would inevitably be refined as discovery and evidence are gained.
- 63. A trial of 500 ESA and ESA HB claimants in June will provide learning on whether the end-to-end journey is still effective for this group and provide useful data for September.
- 64. Many ESA claimants have not been spoken to in a long time and are vulnerable.
- 65. There are concerns about data quality - A recent sampling of 200 ESA cases found errors in 65%. Further information is being sought about the nature of the errors and whether they are likely to affect TP calculations.
- 66. TC MNs will be prioritised for everything outside of ESA and with a planned completion date of December 25.
- 67. Both plans meet the PM's requirement to accelerate migration of ESA and ESA+HB claimants by 2025/26 and will be informed by the June trial of 500 cases.
- 68. Both plans would invite all ESA and ESA+HB claimants to move by Sept 2025 preserving the contingency period and ensuring there is sufficient time to safely move these claimants by March 2026.
- 69. Not standing down the wider team delivering MtUC means the level of expertise, knowledge and momentum remains in place to support the migration of ESA and ESA+HB claimants.
- 70. The options differ in terms of scaling. Option 1 is a flat profile from September while Option 2 would start from a lower profile in September then grow from there.

Discussion:

- 71. The SRO questioned what learning would be gained from the growing profile, highlighting that when previous profiles had gone slowly it was due to product work needed or ops not being in place.
- 72. Areas of concern include the vulnerability of this cohort, the volume of cases coming into the organisation and the complexity, and the work needed.
- 73. From a resourcing perspective, there could some benefit in having stable FTE requirement rather than one that's changing and have that agreed rather than a changing one as profile changes.
- 74. Whichever option is chosen, recruitment and onboarding specialist staff should begin now to ensure they are in place as soon as possible.
- 75. Further information is needed about the impact of both options before a decision can be reached.


76. Stakeholders are broadly on board with bringing ESA migration forward and have concerns about it potentially moving too quickly.
77. The NI representative highlighted the NI budget shortfall which could mean insufficient NI resource to complete ESA migration by 24/25.

Action 02: SRO and NI representative to talk to HMT regarding the Barnet consequential to look at ways to work together and come back to update PB.

Action 03: A follow up paper on ESA planning to be brought to PB in July to include further iteration on what would be learned from the growing profile and detailing resource needed and potential impacts.

AOB

78. None

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