



Rethinking Social Security

Improving our social security assessment processes: Personal Independence Payment (PIP), Conditionality, and Work Capability Assessment (WCA)

Information and eligibility criteria sheet April – December 2024

Who?

[Lloyds Bank Foundation](#) is a UK-based charitable organisation who support other charities that work to tackle disadvantage and improve the lives of vulnerable people. They provide funding, resources, and training to these charities, helping them to deliver vital services and make a positive impact in their communities. The Foundation focuses on supporting charities that address issues such as homelessness, mental health, domestic abuse, and financial inclusion.

The [Department for Work and Pensions \(DWP\)](#) is the government department primarily responsible for welfare and pensions policies, aiming to provide social security to individuals in various circumstances. One of its key functions is administering social security processes, including Personal Independence Payments (PIP), the Work Capability Assessment (WCA) and the 'conditionality' that people have to meet to receive certain some forms of social security payments.

[Rethink Mental Illness](#) is a leading charity provider of mental health services in England, putting people severely affected by mental illness and those who care for them at the heart of everything we do. Experts by experience (EbEs) shape many of our services, are involved in influencing our policy and campaigning work, and participate in external lived experience engagement projects.

We have been commissioned by Lloyds Bank Foundation to deliver a 3-year project to influence the government to make improvements to welfare assessments and the way it approaches conditionality. We will work with EbEs throughout the project to hear about experiences of assessments and conditionality to identify the improvements that are needed.

What?

The [Work Capability Assessment \(WCA\)](#) evaluates a person's ability to work, for people claiming or applying for certain benefits like new-style Employment and Support Allowance (ESA) or Universal Credit (UC). The WCA assesses a person's capability for work due to illness or disability. The WCA is used to determine what work-related conditions a person must meet to keep getting their benefit.

The [Personal Independence Payment \(PIP\)](#) assessment evaluates how a person's health affects their daily living and mobility activities and the extra costs that they endure. It determines whether someone can receive PIP as well as the level of PIP.

Conditionality is the principle that if a person is receiving specific types of social security (UC, ESA) and they do not have [Limited Capability for Work-Related Activity \(LCWRA\) status](#), then they are expected to complete work-related activities. If a person does not fulfil these activities, then their social security can be reduced or closed by the DWP – otherwise known as sanctions.

We want to hear from people who have been through a WCA and/or PIP assessment, whether successful or not. The engagement sessions will focus on:

- What changes are needed to improve the WCA/PIP processes and assessments.
- To better understand the specific needs and challenges of people severely affected by mental illness, including those from minoritised ethnic backgrounds, and those living with multiple, comorbid health conditions when undergoing a WCA and applying for PIP.
- Your experience of engaging with work coaches and assessors, and what could make this a experience safe, appropriate, and fair.

We want to use this opportunity to hear your views of assessments like WCA and PIP, as well as how conditionality is decided, so that your voice can influence and inform the redesign of these processes.

When?



Phase One: Coproduction

March - April 2024

Together with Rethink Mental Illness staff you will navigate the project, ensuring engagement sessions are accessible for people with lived experience of WCA and PIP.



Phase Two: Session Planning

Based on the coproduction session, Rethink Mental Illness staff will organise online engagement sessions to hear what EbEs* have to say about WCA and PIP.

*EbEs includes families and carers of those with lived experience of mental illness.



Phase Three: Online Engagement

May - July 2024 and November - December 2024

This is where you come in!

Rethink Mental Illness staff to facilitate a number of online engagement sessions.



Phase Four: Share Learnings

Rethink Mental Illness staff will review what everyone has said and present this information in a short document with key themes to our Policy and Influencing team to influence government, including DWP.



We are asking for about two half days of your time (with remuneration of £50 per engagement session).

We would like your help!

Please complete this section when sending back to Rethink Mental Illness.

At Rethink Mental Illness, we work with people with 'lived experience' of being severely affected by mental illness. We include families and carers in this definition.

You don't have to meet all these criteria to be able to participate; we just want to know a little more about which topics you might have lived experience of.

We would like to talk to you if you have some of the following experiences or characteristics.

Essential characteristic:

1. Are over 18 years of age
2. Are severely affected by mental illness, or are a carer for someone who is
3. Ability to share views, and provide constructive feedback
4. Ability to work collaboratively with a group of people with a range of different experiences and perspectives related to WCA, PIP, and DWP more broadly
5. Willingness and ability to listen to others' views, as well as sharing your own
6. **Feel in a place where you are ready and well enough and able to speak about these topics without it negatively affecting your wellbeing.**



Desirable (One or more of the following characteristics):

1. Have (or someone you care for has) **historically** applied for either UC, or ESA, and have had a WCA, whether you received UC, ESA, or not,
2. Have (or someone you care for has) **historically** applied for PIP, whether you received it or not.
3. Have (or someone you care for has) **historically** been in the DWP's Severe Disability Group
4. Have (or someone you care for has) **historically** been sanctioned by the DWP

Whilst we very much welcome interest from anybody who feels they meet some of the above criteria, we are keen that we include people with a diverse range of experiences and backgrounds. We actively encourage and welcome expressions of interest from people belonging to communities who are often underrepresented. **We would be especially keen to hear from:**

- People who are Black, Asian, or from a minoritised ethnic group
- People from Gypsy, Roma, and Traveller communities
- People living with a physical disability, and/or with multiple, comorbid health and mental health issues
- People who are neurodivergent
- People from the LGBTQIA+ community
- Older adults
- People with current or historical experience of homelessness
- Refugees and asylum seekers

This is not an exhaustive list. If you are not from a group listed above, and fulfil the criteria to participate, we are still very interested in hearing from you.

We want to ensure that everyone who wants to get involved has an equal opportunity to do so. If you require any accommodations or adjustments to support you better to participate, please let us know by emailing ravina.sangha@rethink.org and we'll make reasonable adjustments to meet your needs.

We offer £50 for a half day of participation, which you can accept if you want to. We can talk to you about the pros and cons of accepting this involvement payment, **such as implications if you are in receipt of social security benefits.**

It is the responsibility of the individual EbEs to comply with the conditions of their benefits, and not Rethink Mental Illness. However, we have a responsibility to provide information which enables individuals to make informed decisions about whether to accept an involvement payment. **We advise all EbEs who are receiving state benefits to seek independent advice before they accept any involvement opportunities.**

In order to pay EbEs, we will need you to fill in a few forms which we can send you before or after the session. These include information such as your bank details, your national insurance number, and your contact information. We can help with this.

We have to register you with our payroll team. However, this does not mean you would be an employee of Rethink Mental Illness. There are possible implications to accepting payment if you are on welfare benefits. Please read pages four onwards in the **Involvement Payment Policy**, for more information about this.

You will get paid on the 15th of the month after participation, as long as we receive your forms back before the end of the month, so we can process your forms via our Payroll Team.

Why should I take part in the project?

- We really value your ideas and experiences.
- What you share will feed into our attempts to influence the government to improve welfare assessments and conditionality.
- We will offer you money for your participation, recognising your contributions.

Are there any risks in taking part?

- The topics we talk about can be sensitive.
- The discussions can bring up difficult and sticky emotions, and challenging memories.
- You may share, or want to share, challenging past experiences.
- It can be difficult to share vulnerable life experiences within group settings.

How will you manage those risks?

- We have experienced facilitators who are skilled at supporting people severely affected by mental illness and suicide, and their families.
- We'll run pre-meets before sessions, and debriefs after each session so you ask questions, and share feelings or reflections.
- We have shared a signposting resource with you for more help if you need it.
- We have shared readiness resource with you, to help you reflect on whether you feel ready and able to participate, whilst looking after yourself.
- We are available between sessions if things come up that you would like to discuss, and we can signpost you for further support as needed.

What can we expect of each other?

From you

- You give your consent to participate in the project.
- You agree to use your lived experience insights to feed into the project.
- You agree to be respectful to your peers and to us as Rethink Mental Illness.
- You agree to let us know if you need any additional support before, during, or after the sessions.
- You speak to a member of staff or email us at ravina.sangha@rethink.org or if

you're unhappy about something that happened during a session¹.

From us

- We'll make any Reasonable Adjustments within our power that you may need to participate.
- We'll share information with you about the project via email or by Teams call.
- We'll send you Teams links ahead of time so you can put them in your diary.
- We'll send you pre-reading materials with plenty of time ahead of sessions.
- We will reply to emails you send as soon as possible, if you have questions.
- We will be respectful towards you, via email, and during online sessions.
- We will keep you updated about the progress of the project.
- We will signpost you towards relevant services and support if you ask.
- We will pay you in a timely way for your participation.

We're happy to hear from you about what else you might expect from us!

Safety and Safeguarding

Safeguarding means protecting an adult's right to live safely, free from abuse and neglect. **The safeguarding duties apply to an adult who:**

- Has needs for care and support (whether or not the local authority is meeting any of those needs),
- Is experiencing, or at risk of, abuse or neglect, and
- As a result of those care and support needs is unable to protect themselves from either the risk of, or the experience of abuse or neglect.

¹ Rethink Mental Illness feedback and complaints: www.rethink.org/aboutus/who-we-are/make-a-complaint/

If you have a safeguarding concern, you can speak to us or email us at RecoveryandOutcomes@rethink.org, or contact your Local Authority Safeguarding Team: www.nhs.uk/service-search/other-services/Local-Authority-Adult-Social-Care/LocationSearch/1918.



How will my data be managed?

With your permission, we will write notes during engagement sessions.

We will then type up the notes. These notes will contain your initials, but they will be **anonymised** when sharing beyond

our team. This means the report will not have your name, or any identifying information with them, unless you specifically ask for that.

Rethink Mental Illness staff will be the only people who can see this information.

The notes will be written up into a short document outlining key themes to share with our Policy and Influencing team. They will use these key themes to influence government and DWP. If we use a quote you have said, even though we'll be using it anonymously, we'll always try and ask you before we do.

We may also use anonymised insights you've given in the future to inform other work we do, for people severely affected by mental illness and suicide.

If you were to tell us something which made us concerned for your, or someone else's immediate safety, we would have to share this information with the relevant authorities. We would talk this through with you first, where it is possible and safe to do so.

Please see the Rethink Mental Illness [Privacy Policy](#) for information about how we use and store your data.

Next steps

If you are interested in being part of the engagement sessions, please email ravina.sangha@rethink.org to find out more by **Monday 6th May 2024**.

Many thanks, and we very much look forward to hopefully meeting you soon.

**The Policy and Practice team at
Rethink Mental Illness**