

HMRC Advice and Support 21/22

Delivery Guide for Centre Managers

1st May 2021 - 31st March 2022

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If you require any information about using Management Information (MI), CaptureIT or delivery, please see the Delivery Guide for advisers/tutors/volunteers on the [project landing page](#).

1. Introduction to HMRC Advice and Support

The HMRC Advice & Support project will run for three years in total, further funding for 2022/23 and 2023/24 will be reviewed annually and will be subject to performance and due diligence checks, it will not be awarded automatically.

- Year 1: 1st May 2021 - 31st March 2022
- Year 2: 1st April 2022 - 31st March 2023

- Year 3: 1st April 2023 - 31st March 2024

This is funded by Her Majesty's Revenue and Customs to provide high-quality advice surgeries within England's most deprived areas.

The services that HMRC particularly want people to be supported to use are:

Capital Gains Tax	Income Tax (PAYE)	Personal Tax Account
Child Benefit	Inheritance Tax	Self Assessment
Child Tax Credit	Marriage Allowance	VAT
Corporation Tax	National Insurance	Working Tax Credit

While this project does not focus primarily on digital inclusion as many of Good Things Foundation's projects do, there are elements that interlink. For example, more and more elements of HMRC services are becoming accessible online, and gov.uk is a valuable information source for your clients when it comes to understanding their own entitlements to HMRC benefits such as Child and Working Tax Credits and Child Benefit, or their obligations in terms of tax and National Insurance.

Primarily though, the project's aim is to help people become more confident users of HMRC's services, whether digitally or through more traditional channels. In this guide, we will tell you everything you need to know about the project so that you can get on and do just that.

2. Beneficiaries

Online Centres will support HMRC customers who are currently the hardest to reach, who cannot or will not interact directly with HMRC, or need extra support in doing so. Some vulnerable/marginalised customer groups may find it difficult to interact with HMRC for reasons that include geography, culture, language and trust.

As an Online Centre delivering this programme you will support a variety of customers including but not limited to:

- those with disabilities, mental health or learning difficulties;
- those on low income or in debt and facing financial hardship;

- older people;
- migrants;
- carers;
- those who are digitally excluded who are displaying one or more of the following characteristics:
 - experiencing difficulties accessing HMRC services due to illness, disability or digital exclusion
 - lacking confidence and overly worried about making mistakes, or are new to HMRC services
 - lacking the ability to deal with tasks, for example, due to learning difficulties, memory problems, lack of language skills to be able to understand the tax system, complex working situations, or several income strands
 - in debt and experiencing financial hardship, have mental health issues, or suffering extreme distress through life events such as bereavement or the breakdown of a relationship

3. Contract sizes and payments

Contract size	£1,600	£3,200	£6,400	£8,000
Number of people supported	50	100	200	250

For your specific contract size and targets for year 1 please refer to your contract information within the **Your Grants** page on the [Online Centres Network](#) website.

1	25% in May 2021	Payment 1 released upon attendance at training and acceptance of contract
2	25% in August 2021	Payment 2 released dependent on reaching 25% of completions by the end of July for payment in August
3	25% in November 2021	Payment 3 released dependent on reaching 50% of completions by the end of October for payment in November

4	25% in February 2022	Payment 4 released dependent on reaching 80% of completions by the end of January for payment in February, to then work towards 100% of completions
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4. Delivery Assurance Framework

How will Good Things Foundation monitor my funded delivery?

For this project Good Things Foundation will monitor delivery across the Online Centres network using an internal delivery assurance reporting tool which allows us to analyse data from CaptureIT.

Internal Delivery Assurance Reporting tool

Good Things Foundation has developed an online reporting tool that reviews learner level data and reports on abnormal activity. This includes (but is not restricted to):

- CaptureIT text entries
- duplicate learner names
- learner name irregularities
- patterns to learner passwords
- out of hours activity
- high levels of completions or CaptureIT online tutor return for learners who were already registered for this project
- high proportion of learner passwords being reset

Any concerns that Good Things Foundation might have may result in:

- Written notification (by email in the first instance) being sent to the centre to highlight the concern raised and seek clarification.
- A member of staff from Good Things Foundation (or designated person) contacting the primary contact at the centre to discuss their delivery in more detail.
- A member of Good Things Foundation staff (or designated person) arranging a Delivery Assurance visit with the primary contact at the centre. The primary contact **must** be in attendance at this meeting and both parties will take into account any Covid-19 restrictions around social distancing and PPE
- A member of Good Things Foundation staff (or designated person) undertaking an unannounced Delivery Assurance visit.

- Good Things Foundation undertaking a mystery customer exercise.

A member of Good Things Foundation directly contacting individuals who have completed a funded Basic Online Skills course to discuss their learning to help us address any concerns or potential irregularities that may have been highlighted.

5. Social Media

Throughout the project, we urge you to use social media (Twitter, Facebook, Instagram) to demonstrate activity to funders, partners and the wider public.

For anything relating to this project we're using the hashtag **#HMRCAdvice** across all social media channels. There are also generic hashtags that can be used if appropriate, including **#FinancialInclusion #TaxCredits #ChildBenefit #NationalInsurance #Tax** or **#SmallBiz**

Funders & Partners:



[@Online_Centres](#)

[@GoodThingsFdn](#)

[@HMRCcustomers](#) (Service to help with general queries about HMRC products and services)

[@HMRCgovuk](#) (Official news and information from HM Revenue &

Customs.)

Facebook

[Good Things Foundation](#)

LinkedIn

[Good Things Foundation](#)

What should I do on social media?

- Share photos of learners or sessions that are taking place, quick status updates, or links to any web pages, videos or other content relevant to the ongoing project (making sure you have permission from the learner to post their photo).
- Keep an eye on [@Online_Centres](#) and on [@GoodThingsfdn](#) to see how the project is progressing and retweet/reshare anything that interests you or you think would interest your followers.

- Share your thoughts about why this project is important and what difference it's making in your community and for the individuals you have supported.
- Share your thoughts from meetings and training events you attend around the project.

6. Case studies and blog posts

Good Things Foundation may produce a number of case studies for the HMRC Advice and Support project, to publish online, in project reports and to share with funders. These would need to demonstrate the impact of the project and so may approach some project participants in order to produce these.

We may also approach some centres during this time to write a blog post for the Good Things Foundation website or other sites. We'll provide extra guidance if we ask you to do this, and will work closely with you on what content is required.

7. Contact

Please do not hesitate to get in touch with your network specialist if you have any questions or concerns on 0114 3491658 or grants@goodthingsfoundation.org and add '**HMRC 21/22 query**' into the subject line.