

SURREY WELFARE RIGHTS UNIT – APPLICATION FOR FINANCIAL ASSISTANCE

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| Executive Summary | |
| <p>An application for financial assistance has been received from the Surrey Welfare Rights Unit, an organisation which provides specialist support to local organisations who give benefit advice, as well as directly taking on the most complex benefit cases.</p> <p>The Unit has applied for £10,000 to contribute to covering their core costs, in particular its advice line and specialist casework. In recognition of the key role the Organisation plays for the voluntary sector, Woking Borough Council has supported the Unit for a number of years both with grant funding and providing the charity with premises at the Monument Way Depot.</p> <p>The Unit continues to provide invaluable advice and support to charities across the County, working closely with statutory agencies. It is recommended that, in accordance with the previous decisions of the Executive and in view of the continuing specialist services provided, the Council's support is continued in the coming year and that a grant of £10,000 is awarded.</p> | |

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| Recommendations | |
| Reasons for Decision | To ensure the continued services of the Unit for Woking residents. |
| Legal Authority | S142 Local Government Act 1972 |
| The Executive is requested to: | RESOLVE That a grant of £10,000 be awarded towards core costs, in particular the advice line and specialist casework. |
| Conditions | <p>Accounts. The Organisation must submit audited accounts for the year in which the grant is awarded, including an income and expenditure account and balance sheet. Please note that accounts for other years may also be required.</p> <p>Monitoring Information. The Organisation must submit quarterly monitoring information as a measure of its achievements. Failure to provide details will jeopardise the award. E-mail requests will be sent to the applicant on a quarterly basis.</p> <p>Publicity. Where possible, the Organisation is required to publicise the support received from Woking Borough Council, including on all literature and leaflets produced.</p> <p>Payments. Unless exceptional circumstances exist all invoices must be received quarterly with details of the costs incurred and monitoring information for the previous quarter.</p> <p>Payment Period. Final quarter claims must be made by the second week in March. Unclaimed awards will not be available at a later date unless exceptional circumstances can be demonstrated to the Council before the end of the award year.</p> <p>Joint Working. WBC expects the Organisation to engage positively on health and wellbeing multi-agency joint work affecting Woking. Groups which refuse may place their Council support at risk, e.g. grant, concessionary rent and other assistance.</p> |

Surrey Welfare Rights Unit – Application For Financial Assistance

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| | <p>Homelessness Reduction Act 2017. With the introduction of new legislation from April 2018, the council will expect the support of partner agencies in identifying people at risk of homelessness as early as possible to maximise the opportunities to prevent such. Partner agencies / organisations will be expected to be engaged in joint working arrangements to assist in finding suitable housing and support solutions, and where appropriate to undertake and respond to the new 'duty to refer'. Groups which do not support this new legislation and way of working positively, may put their Council support at risk.</p> <p>Venue Hire. Woking Borough Council has a duty to ensure that publicly-owned venues and resources do not provide a platform for extremists and are not used to disseminate extremist views. This duty extends to organisations that work with the local authority so this includes recipients of any grants from Woking Borough Council. If you hire out your venue/s you should ensure you have good processes in place for record keeping and checking if they are an appropriate group to be making the hire arrangements. The following are some of what should be considered:</p> <ul style="list-style-type: none"> • Basic details should be recorded to include speakers address, mobile phone number & organisation details. • Has the identity of the speaker been confirmed & is their organisation bona fide? Are they known to you? • Is the speaker from the area? Are they UK citizens or from overseas & will they travel specifically for this event? • Consider checks on the internet to confirm the status of speaker to include website, YouTube or social media sites. • How many people are likely to attend (check previous or similar events either locally or online). |
| Performance Indicators | <p>Users. The Organisation to provide a breakdown of the users in the past quarter.</p> <p>Activities. The Organisation to provide details of activities and events held during the last quarter.</p> <p>Publicity. The Organisation to advise how the Council's support has been publicised over the last quarter.</p> <p>Statement of Use. The Organisation to provide a statement stating the use to which the grant money has been put.</p> |
| Future Support | <p>The financial pressure on the Council's budgets is expected to continue in the coming years and accordingly the overall level of support available in future years may be reduced. The applicant is therefore to be advised that the award of funding for 2018/19 does not imply that a similar application in 2019/20 would be supported. In particular, it is emphasised that the Council is unlikely to be in a position to award any sums above the 2018/19 levels.</p> <p>In view of this, the applicant is to be advised to ensure that contingency plans for the Group's operations for 2019/20 have been drawn up in the event that the Council is unable to continue its support beyond April 2019. All applicants are strongly recommended to pursue alternative sources of funding and are encouraged to approach Woking Borough Council's Community Support Team for advice and support.</p> |

The Executive has authority to determine the above recommendations.

Background Papers:

2018/19 Application Form.

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6 December 2017

Surrey Welfare Rights Unit – Application For Financial Assistance

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| 1.0 Summary of Application | |
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| 1.1 Status and Aims | <p>Surrey Welfare Rights Unit is an independent charity that provides specialist support to local organisations who give benefit advice, as well as directly taking on the most complex benefit cases.</p> <p>The Unit runs an advice line for organisations to use. It provides an annual training programme for new volunteers and paid advisers, as well as running courses for experienced advisers to keep them updated with welfare reforms.</p> <p>The Unit produces and distribute thousands of benefit-related resources including benefit rate posters and factsheets. The Unit works with Council officers, Councillors, MPs and charities to influence decision makers and bring about changes to the benefit system that improve the lives of local vulnerable residents.</p> |
| 1.2 Employees | Six, comprising the Unit Manager (36 hours per week), the Senior Welfare Rights Advisor (30 hours per week), three Welfare Rights Adviser, each serving 21 hours a week, and an Administrator (28 hours per week). |
| 1.3 Volunteers | Nine, including the Unit's trustees who are responsible for the governance of the Charity including financial stability, quality of service, information assurance and planning. |
| 1.4 Clients/Users | <p>1,344, comprising:</p> <ul style="list-style-type: none"> 502 male 842 female 730 disabled 349 ethnic minority 110 resident in Woking 1 aged 0-5 40 aged 11-18 1140 aged 19-65 163 aged 65+ <p>The figures do not include local residents that have been supported with information, talks, workshops or who were anonymous. Furthermore, they do not include the numbers of local advisers trained by the Unit throughout the year.</p> |
| 1.5 Members | N/A |
| 1.6 Sum Requested | £10,000 (Revenue) |
| 1.7 Project | Core costs, in particular towards the costs of delivering the advice line and specialist casework. The advice line is open Monday to Friday, 10am to 4pm. Outside these hours, callers can leave a message or use the email advice service. The advice team takes on a limited amount of casework which is usually either complex, Upper Tribunal appeals, test cases or referrals from organisations that don't hold |

Surrey Welfare Rights Unit – Application For Financial Assistance

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| | expertise in the particular field. |
| 1.8 Cost breakdown: | <p>Payroll including pension costs - £116,370</p> <p>Training costs - £6,900</p> <p>Information production - £3,750</p> <p>IT, phones and website - £3,447</p> <p>Governance - £2,850</p> <p>Books and subscriptions - £2,500</p> <p>Citizens Advice including insurance costs - £2,365</p> <p>Travel costs - £1,780</p> <p>Office costs - £1,650</p> |
| 1.9 Community Benefit | <p>The Charity provides several activities that benefit different groups of people:</p> <ul style="list-style-type: none"> - Advice line and casework: the Unit anticipates that 100+ Woking residents will directly benefit from the advice line and casework service. Volunteers and staff in local organisations are provided with support which in turn will free up their time and enhance their knowledge for the future. - Training: Hundreds of staff and volunteers have access to local training. The Unit provides some free courses and across their whole programme courses range from introductory level to specialist. According to the applicant, there is no other local benefit training. - Research and campaigning: the Unit provides expertise to councillors, officers, policy-makers and campaigners who are all working to improve the lives of local residents. They have contributed during the past year to the cross-council homelessness and mental health protocol. The Charity is working with the County Council on their free travel pass policy, and they attend council welfare reform working groups. - Information: The Charity will write and circulate thousands of benefit rates cards, fact sheets, newsletters and updates. Many of the organisations we support have no other benefit resources other than the Unit's. They rely on the Unit's updates and the Unit's user survey confirms that the benefit rate information is very much valued. In addition they use Twitter and webchats to reach greater numbers and the public directly. |

2.0 Financial Background

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| 2.1 Budget | <p>At the time of the application, the Group held £272,470 in the bank. Funds are reserved for:</p> <p>Redundancy reserve - £26,680</p> <p>Designated project fund - £17,044</p> <p>Designated contingency (premises) - £15,000</p> <p>Restricted funds - £13,686</p> |
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Surrey Welfare Rights Unit – Application For Financial Assistance

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| | <p>Designated IT replacement - £7,000</p> <p>The Group has submitted a budget for 2018/19 which shows an anticipated income of £168,737 (including a £10,000 grant from WBC) against an anticipated expenditure of £183,712, resulting in an anticipated deficit of £14,975.</p> <p>Anticipated income includes:</p> <ul style="list-style-type: none"> ○ SCC & Borough Grants including WBC - £86,737 ○ Carers Grant - £50,000 ○ Subscriptions - £18,000 ○ Training Delivery - £10,000 ○ Bank interest - £2,500 <p>Items of expenditure include:</p> <ul style="list-style-type: none"> ○ Salaries - £137,891 ○ Employers NI - £9,273 ○ Pension contributions - £8,274 ○ Training programme - £5,400 ○ Volunteer expenses - £300 |
| <p>2.2 Accounts</p> | <p>The Group has submitted accounts for 2016/17 which show an income of £211,162 (£234,268 in 2015/16) against expenditure of £200,744 (£209,550 in 2015/16), resulting in a surplus/deficit of £10,418 (£24,718 in 2015/16). The sum of £214,715 was carried forward at the end of the 2016/17 year.</p> |
| <p>2.3 Support over the past five years</p> | <p>2017/18 – £10,000 2016/17 – £10,000 2015/16 – £10,000 2014/15 – £10,000 2013/14 – £10,000</p> <p>The Council also provides accommodation for the Unit at the Monument Way Depot, valued at £3,300 each year.</p> |

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| <h3>3.0 Assessment of Application</h3> | | |
| <p>3.1 Key Information</p> | <ul style="list-style-type: none"> ○ Constitution ○ Registered Charity ○ VAT Registered ○ Equal Opportunities Policy ○ Safeguarding Policy ○ Reserves Policy ○ Quality Mark ○ Other funding sources pursued ○ Other support by the Council ○ Fundraising ○ Two quotes ○ Regular monitoring provided previously | <ul style="list-style-type: none"> Yes Yes No Yes Yes Yes Yes Yes Yes Yes Yes N/A Yes |

Surrey Welfare Rights Unit – Application For Financial Assistance

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| <p>3.2 Consultee Comments</p> | <p><u>Officer Comment</u></p> <p>The group clearly undertake some very valuable work, which is well respected by the increasing number of local organisations joining the Unit. It is clear that the Unit is also experiencing as other agencies are reporting, increased complex cases to deal with, and therefore their specialism is particularly important as too is their Advice Line.</p> <p>In view of the role played by the Unit in advising and assisting local organisations and statutory agencies (including the council), I would be supportive of the application.</p> |
| <p>3.3 Assessment</p> | <p>Surrey Welfare Rights Unit is an independent charity that provides specialist support to local organisations who give benefit advice, as well as directly taking on the most complex benefit cases. The Unit has applied for £10,000 to contribute to covering their core costs, in particular their advice line and specialist casework. Woking Borough Council has supported the Unit for a number of years both with grant funding and providing the charity with premises at the Monument Way Depot.</p> <p>The Unit also receives funds from Surrey County Council, a Carers Grant and subscriptions from users of the advice line. It also seeks to apply for funding from “large national funders”, including the Lottery and Children in Need. Funding from Councils represents around 65 per cent of their total income (FY ending 2017), meaning that, from the Charity’s perspective, its withdrawal would “almost certainly” mean closure.</p> <p>According to the applicant, almost every local organisation that provides benefit advice and support now subscribes to the advice line. The Unit points out that in its most recent survey, the advice line reported that 98% of advisers were “very satisfied” with it. The Applicant has stated that there are unique situations in which the Unit’s advice is invaluable, and that there is no duplication with other advice services.</p> <p>In turn, benefit advice can be provided to a number of groups of people in the community. Particularly vulnerable groups stand to benefit, including those at risk of homelessness, mental health issues, those bereaved, victims of domestic abuse, those going through court proceedings or people on long term sick leave. In this regard, the Unit argues that the investment of the grant is returned many times over in saving money that would otherwise be spent on housing, health and social care. The applicant has advised that the Group’s advice and casework has been independently valued in 2016/17 as generating £19.13 for every £1. In addition, the Unit predicts that new pressures will increase demand for their services, including the reduced benefit cap, the introduction of Universal Credit and complications arising from the increasing prevalence of insecure, casual employment.</p> <p>The Unit continues to provide invaluable advice and support to charities across the County, working closely with statutory agencies. It is recommended that, in accordance with the previous decisions of the Executive and in view of the continuing specialist services provided, the Council’s support is continued and that a grant of £10,000 is awarded for the coming year.</p> |

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