

**SURREY WELFARE RIGHTS UNIT – APPLICATION FOR FINANCIAL ASSISTANCE**

<b>Executive Summary</b>	
<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>Covid-19 has increased the workload for the Unit, on topics that are new to advisors such as the Job Retention Scheme and sickness benefit rules. New funding is being explored by the Unit to cover the deficit created by the decrease in training income as a result of Covid-19, and to help meet their charitable objectives, including grant-making bodies to support a future project.</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>	

<b>Recommendations</b>	
The Executive is requested to:	<b>RESOLVE That</b> , subject to the outcome of the Council's budgetary process, a grant of £10,000 be awarded from the Community Grants Budget towards core costs, in particular the advice line and specialist casework.
Reason for Decision	To ensure the continued services of the Unit for Woking residents.
Legal Authority	S142 Local Government Act 1972
Confirmation of funding	<p>This award is provisionally made on the expectation that the Council's budgets for revenue and capital projects remain at the same level allocated for the current financial year. The Council's overall budget, including the sums allocated for community grants, will be determined by Council at its meeting on 11 February 2021. In the event the grant budgets are set at the anticipated levels, confirmation of the Council's support will be sent to successful applicants. Groups should not plan for the 2021/22 funding until this confirmation has been received.</p> <p>Should the budgets be reduced as part of the Council's efforts to achieve savings to offset the impact of Covid on the Council's financial position, a special meeting of the Executive will be held to review the provisional awards and allocate the funds available on a priority basis.</p>
Conditions	<b>Accounts.</b> The Organisation must submit 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

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	<p>may also be required.</p> <p><b>Monitoring Information.</b> 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><b>Publicity.</b> Where possible, the Organisation is required to publicise the support received from Woking Borough Council, including on websites and literature / leaflets produced.</p> <p><b>Payments.</b> Unless exceptional circumstances exist all invoices must be received quarterly with monitoring information for the previous quarter.</p> <p><b>Payment Period.</b> Final quarter claims must be made by the second week in April. 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><b>Joint Working.</b> 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> <p><b>Homelessness Reduction Act 2017.</b> Following the introduction of new legislation from April 2018, the Council expects 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 are 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>
Performance Indicators	<p><b>Users.</b> The Organisation to provide a breakdown of the users.</p> <p><b>Activities.</b> The Organisation to provide details of activities and events held.</p> <p><b>Publicity.</b> The Organisation to advise how the Council's support has been publicised.</p> <p><b>Statement of Use.</b> The Organisation to provide a statement stating the use to which the grant money has been put.</p>
Future Support	<p>Due to the impact of Covid-19, the financial pressure on the Council's budgets is higher than ever and is expected to continue in the coming years. 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 2021/22 does not imply that a similar application in 2022/23 would be supported. In particular, it is emphasised that the Council is extremely unlikely to be in a position to award any sums above the 2021/22 levels.</p> <p>In view of this, the applicant is to be advised to ensure that contingency plans for the Group's operations for 2022/23 have been drawn up in the event that the Council is unable to continue its support beyond April 2022. 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</p>

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support.

**The Executive has authority to determine the above recommendations.**

### **Background Papers:**

2021/22 Application Form.

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### **Date Published:**

2 December 2020

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<b>1.0 Summary of Application</b>	
1.1 Status and Aims	<p>Surrey Welfare Rights Unit was formed in 1990 and provides specialist advice to Surrey residents, as well as supporting organisations with training, information resources and an advice line benefit queries.</p> <p>The Unit undertakes complex casework including representation at First-Tier and Upper Tier tribunals and works with policy-makers at local and central Government to influence social security reforms, so that vulnerable clients are not disadvantaged or discriminated against.</p>
1.2 Employees	<p>Six, comprising Chief Officer (36 hours per week), Senior Welfare Rights Adviser (30 hours per week), 3 x Welfare Rights Adviser (totalling 60 hours per week) and Administrator (28 hours per week). All staff are line-managed by the Chief Officer who reports to the Trustee Board.</p>
1.3 Volunteers	<p>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.</p> <p>The advice team at the Unit has more than 65 years' experience in giving advice on complex legal matters. They are experts in their field which is reflected in the numerous times they are called on by individuals and organisations to advise and inform on cases and policy matters. The advisers have worked in local Citizens Advice, Law Centres, Child Poverty Action Group and Age UK Surrey. They have appeared at a Parliamentary Select Committee, advised MPs and Councillors, and influenced changes in legislation.</p>
1.4 Clients/Users	<p>1,489, comprising:</p> <ul style="list-style-type: none"> <li>551 male</li> <li>938 female</li> <li>640 disabled</li> <li>223 ethnic minority</li> <li>99 resident in Woking</li> <li>1 aged 6-10</li> <li>21 aged 11-18</li> <li>1312 aged 19-65</li> <li>155 aged 65+</li> </ul> <p>No charges for advice are made to users. A charge is levied for some of the training courses, although many are free or low cost as they are funded from other sources. Organisations that access the Advice Line pay an annual subscription which is banded according to their income.</p> <p>For Woking residents, 271 benefit queries were completed; mostly concerning Housing Benefit, Personal Independence Payments and the Employment and Support Allowance.</p> <p>In addition talks and workshops were delivered to 216 local residents, volunteers and professionals.</p>

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	370 local advisers have also been trained across a whole range of social security topics, but in particular, Universal Credit.
1.5 Members	None.
1.6 Sum Requested	£10,000 (Revenue)
1.7 Project	<p>The Unit is applying for funding towards its 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 do not hold expertise in the particular field.</p> <p>Demand on the Organisation’s services has increased dramatically since the introduction of Universal Credit, leading to more calls being received by the Advice Line along with a greater number of requests being made for training, delivery of talks and more complex casework.</p>
1.8 Cost breakdown:	<p>Staff costs - £122,807</p> <p>Premises - rent in kind - £8,857</p> <p>Training programme - £2,640</p> <p>Governance - £4,017</p> <p>Advice and information services - £4,795</p> <p>IT, phones and website - £2,275</p> <p>Other - £3,804</p> <p>Total - £145,391</p>
1.9 Community Benefit	<p>The Charity provides several activities that benefit different groups of people:</p> <ul style="list-style-type: none"> <li>○ 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. The Unit deals with the most complex benefit enquiries; the cases that advisers have tried to resolve themselves but have been unable to.</li> <li>○ 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. Topics include the social security system and the issues which arise for complainants. According to the applicant, there is no other local benefit training. Recently talks have been delivered to Special Guardians, Family Voice Surrey, Surrey Choices and social workers and the Children’s Trust.</li> <li>○ 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.</li> <li>○ Information: The Charity will write and circulate thousands of</li> </ul>

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	<p>benefit rates cards, fact sheets, newsletters and updates. Many of the organisations supported have no other benefit resources other than those of the Unit. They rely on the Unit's updates and its 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.</p>
<p>1.10 Covid-19 Impact</p>	<p>Between March and June 2020, it was report that the number of Universal Credit claims doubled from 3 million to 6 million as a result of Covid-19. The Unit is carefully monitoring the impact of local redundancies and the rise in demand for information concerning end of employment and new claims for benefits. Since Covid-19 volunteers have been advising on issues that they haven't come across before including the Job Retention Scheme, Self-Employment Income Support scheme and changes to sickness benefit rules. With such an increase in benefit claimants, there is likely to be a rise in need for casework and appeals work.</p> <p>New funding is being explored by the Unit to cover the deficit created by the decrease in training income as a result of Covid-19, and to help meet their charitable objectives, including grant-making bodies to support a future project.</p> <p>The Unit's website now has dedicated Covid-19 information articles that are constantly being updated. The Unit is working on delivering new e-training modules for local advisers who may be working remotely.</p>

<h3>2.0 Financial Background</h3>	
<p>2.1 Budget</p>	<p>At the time of the application, the Group held £246,214 in the bank. The sum of £141,098 is reserved for specific uses such as Designated Funds, in addition to the six months' running costs required to be held by the Unit's Reserves Policy.</p> <p>The Group has submitted a budget for 2021/22 which shows an anticipated income of £176,800 against an anticipated expenditure of £211,024, resulting in an anticipated deficit of £34,224.</p> <p>Anticipated income includes SCC &amp; Borough grants (£87,250), carers contracts (£50,000), subscriptions (£23,000), training delivery (£8,000) and premises/rent subsidy (£3,300). Items of expenditure include salaries inc. pensions &amp; NI (£180,300), rent in kind (£3,300), training programme (£3,000), computer costs (£2,870), books etc (£2,562) and Citizens Advice membership (£2,290).</p>
<p>2.2 Accounts</p>	<p>The Group has submitted accounts for 2019/20 which show an income of £197,832 (£197,832 in 2018/19) against expenditure of £201,775 (£201,775 in 2018/19), resulting in a deficit of £3,943 (a deficit of £3,943 in 2018/19). The sum of £195,448 was carried forward at the end of the 2019/20 year.</p>
<p>2.3 Support over the past five years</p>	<p>2020/21 – £10,000                  2019/20 – £10,000                  2018/19 – £10,000                  2017/18 – £10,000</p>

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2016/17 – £10,000

<b>3.0 Assessment of Application</b>		
3.1 Key Information	<ul style="list-style-type: none"> <li>○ Constitution</li> <li>○ Registered Charity</li> <li>○ VAT Registered</li> <li>○ Equal Opportunities Policy</li> <li>○ Safeguarding Policy</li> <li>○ Reserves Policy</li> <li>○ Quality Mark</li> <li>○ Other funding sources pursued</li> <li>○ Other support by the Council*</li> <li>○ Fundraising</li> <li>○ Two quotes</li> <li>○ Regular monitoring provided previously</li> </ul> <p>*The Council also provides accommodation for the Unit at the Monument Way Depot, valued at £3,300 each year.</p>	<p>Yes</p> <p>Yes</p> <p>No</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>N/A</p> <p>Yes</p>
3.2 Consultee Comments	<p><u>Elsbeth Andrews, Development Officer for Volunteer Woking</u></p> <p>Surrey Welfare Rights Unit provides expert legal advice on benefits and community care. The Unit has been set up as a support organisation meaning that it provides services to organisations who deliver advice rather than direct to the public.</p> <p>Surrey Welfare Rights has requested Revenue Funding to the sum of £10,000 to cover the core running costs, in particular towards the costs of delivering the advice line and specialist casework services.</p> <p>The organisation continues to have an important role to play within the Woking community supporting public services and providing accurate information and guidance to our residents. As with previous years I recommend that the Council supports this application with the full amount requested.</p>	
3.3 Assessment	<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 Group is continuing to explore project funding particularly for Universal Credit support. This would add capacity at a time when demand is increasing, as opposed to funding current core services. The Group will continue to develop its training programme which</p>	

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generates new income whilst seeking new subscribers. The Carer's contract with funding from the Better Care Fund will continue into 2021/22, with grants also received from Surrey County Council and several Boroughs and Districts.

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 93% of advisers were "very satisfied" with it. The survey also revealed that only 18% of organisations had sufficient resources to help clients with benefit appeals including representation at tribunals. Since Universal Credit was rolled out locally there has been a 25% increase in enquiries when compared with a year ago. Issues dealt with have risen by 62% reflecting the complex nature of this new benefit and how it affects legacy benefits.

Since 2010 the number of enquiries that the Unit is dealing with has doubled. It has increased its funding sources so that it can cope with the additional demand. This has included increasing subscriptions and training income this year; undoubtedly due to the arrival of Universal Credit. Training has been run outside of the county and to all the Surrey boroughs and districts that still run open grant schemes. The Unit's statutory funding has not increased for eight years, but it is still a vital part of core funding.

Each time an adviser is trained on a new area of social security law or practice, they then help hundreds more people with that new knowledge. Every Upper Tribunal case won makes caselaw that helps other local residents in similar circumstances. Each time the Unit successfully gets a disabled person's PIP reinstated, not only do they have that additional income but their Carer, if they have one, can claim Carer's Allowance. One single household that is helped to restore their Universal Credit or Housing Benefit can save thousands of public funds if homelessness is prevented. Confirmed benefit gains for Advice Line queries totalled £528,607, with £42,783 directly to Woking residents. The Unit is noted to be cost-effective, responsive and unique in what it does at a local level.

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.

REPORT ENDS