

SURREY WELFARE RIGHTS UNIT – APPLICATION FOR FINANCIAL ASSISTANCE

Executive Summary

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.

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.

The Unit deals with the most complex benefit enquiries; the cases that advisers in partner organisations have tried to resolve themselves but have been unable to. Often it is advising on points of law that have not been challenged before, identifying discrimination and supporting the most vulnerable clients either directly or through their appointee or support worker. Enquiries can take hours to research, assessing regulatory guidance, identifying relevant caselaw and considering whether new arguments to challenge could help our clients. For Woking residents over the past year, 219 benefit queries were completed; mostly concerning Universal Credit, Housing Benefit, Personal Independence Payments and the Employment and Support Allowance.

Every local adviser in its partner organisations that it trains will help hundreds of local residents. Even if benefits advice is not their primary activity, when trained to help their clients, they can ensure that person gets the advice they need when they need it, rather than being referred on to another organisation which may not always be appropriate. This includes care leavers, people who are terminally ill, people leaving prison, and tenants in supported housing. The courses provided by the Unit range from introductory level up to advanced, and topics cover all the social security system and the issues that arise for claimants.

Surrey Welfare Rights Unit provides expert legal advice on benefits and community care. The pandemic, changes in legislation, the transition to Universal Credit and missed applications for the Settled Status scheme are all likely to increase the unit's workload over the coming year. They provide support to public services and accurate information and guidance to our residents. Potentially this reduces some of the impact on our services. They support many of the themes in Woking's Corporate Plan 2021-22.

Taking into account the Council's financial position, it is recommended that a grant be awarded at the same level as last year with a reduction of 10%, equating to £9,000.

Recommendations

The Executive is requested to:

RESOLVE That, subject to the outcome of the Council's budgetary process, a grant of £9,000 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.

Confirmation of funding

This award is provisionally made on the expectation that the Council's

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	<p>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 10 February 2022. 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 2022/23 funding until this confirmation has been received.</p>
<p>Conditions</p>	<p>Accounts. 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 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 websites and literature / leaflets produced.</p> <p>Payments. Unless exceptional circumstances exist all invoices must be received quarterly with monitoring information for the previous quarter.</p> <p>Payment Period. 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>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> <p>Homelessness Reduction Act 2017. 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>
<p>Performance Indicators</p>	<p>Users. The Organisation to provide a breakdown of the users.</p> <p>Activities. The Organisation to provide details of activities and events held.</p> <p>Publicity. The Organisation to advise how the Council's support has been publicised.</p> <p>Statement of Use. The Organisation to provide a statement stating the use to which the grant money has been put.</p>
<p>Future Support</p>	<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 2022/23 does not</p>

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imply that a similar application in 2023/24 would be supported. In particular, it is emphasised that the Council is unlikely to be in a position to award any sums above the 2022/23 levels.

In view of this, the applicant is to be advised to ensure that contingency plans for the Group's operations for 2023/24 have been drawn up in the event that the Council is unable to continue its support beyond April 2023. 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.

The Executive has authority to determine the above recommendations.

Background Papers:

2022/23 Application Form.

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1.0 Summary of Application	
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 Tribunals and Appeals to the Upper Tier. It 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	Seven, comprising Unit Manager, Senior Welfare Rights Adviser, 4 x Welfare Rights Advisers and Administrator.
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 collectively more than 80 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>1,747, comprising:</p> <ul style="list-style-type: none"> 612 male 1,135 female 709 disabled 297 ethnic minority 209 resident in Woking 52 aged 11-18 1,450 aged 19-65 245 aged 65+ <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 over the past year, 219 benefit queries were completed; mostly concerning Universal Credit, Housing Benefit, Personal Independence Payments and the Employment and Support Allowance.</p>
1.5 Members	None.

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1.6 Sum Requested	£10,000 (Revenue)
1.7 Project	<p>The Unit is applying for funding towards its specialist benefits advice and training delivery services in the Borough. Since the introduction of Universal Credit it has experienced a significant rise in the complexity of enquiries into the service.</p> <p>There continue to be multiple changes to legislation and guidance, as well as temporary schemes introduced as a result of Coronavirus that have impacted on people's benefits. These include the Self-Employment Income Support Scheme and changes to Carer's Allowance rules. It is also regularly advising non-UK residents who have been affected by the UK withdrawal from the EU. As well as the advice team having to update their knowledge on all the new rules, the Unit is writing and delivering new courses all the time to keep its user organisations up to date.</p>
1.8 Cost breakdown:	<p>Staff costs - £194,252</p> <p>Premises - rent in kind - £3,986</p> <p>Training programme - £2,357</p> <p>Governance - £5,300</p> <p>Advice and information services - £8,936</p> <p>IT - £2,550</p> <p>Other - £1,446</p> <p>Total - £218,827</p>
1.9 Community Benefit	<p>The Unit deals with the most complex benefit enquiries; the cases that advisers in partner organisations have tried to resolve themselves but have been unable to. Often it is advising on points of law that have not been challenged before, identifying discrimination and supporting the most vulnerable clients either directly or through their appointee or support worker. Enquiries can take hours to research, assessing regulatory guidance, identifying relevant caselaw and considering whether new arguments to challenge could help our clients. During the last year it helped with complex benefit problems and provided training to 209 local residents and volunteers.</p> <p>Every local adviser in its partner organisations that it trains will help hundreds of local residents. Even if benefits advice is not their primary activity, when trained to help their clients, they can ensure that person gets the advice they need when they need it, rather than being referred on to another organisation which may not always be appropriate. This includes care leavers, people who are terminally ill, people leaving prison, and tenants in supported housing. The courses provided by the Unit range from introductory level up to advanced, and topics cover all the social security system and the issues that arise for claimants.</p> <p>It provides talks online to local Carers and supported housing providers and is currently working with local Councils and health services on multi-agency policies and solutions to address food and fuel poverty locally.</p> <p>Thousands of benefit rate cards and posters have been distributed</p>

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	<p>with 2021/22 rates on to staff and volunteers who give advice. Newsletters and factsheets have also been distributed so that local organisations can keep up to date with all the welfare reforms and test cases that are shaping the benefit agenda. Information is posted on Twitter and via subscriber distribution lists. The Unit is the focal point of welfare rights in the County.</p>
1.10 Covid-19 Impact	<p>The Unit's training income is still impacted despite writing and delivering more new courses online. This is because e-courses have to be shorter, and therefore the fees have to reflect this when compared to full-day courses in person. It is still impacted by Government announcements made at short notice, not just decisions on lockdowns and office working, but social security announcements that impact on advice giving and e-training resources. It continues to be a period of continual legislative change, and its partners are relying on the Unit to cascade the most up to date information so that they can support their clients fully and accurately.</p> <p>Its clients are also facing more uncertainty, noting the proposed cut to Universal Credit. The numbers of EU nationals who have not applied to the Settled Status scheme by the June deadline is unknown, although the data suggests the number includes many older residents. As the Unit is registered with the OISC, it can advise on late applications. In September 2021 the "furlough" scheme and the self-employment support scheme ended. The Unit is expecting that more people may lose their jobs and businesses and more claims for sickness and disability benefits as a result of long-Covid. There are likely to be a greater number of Carers seeking advice, especially if they have to reduce their hours or work, or give up work in order to care for family and friends affected by Covid-19.</p>

2.0 Financial Background	
2.1 Budget	<p>At the time of the application, the Group held £233,063 in the bank. The sum of £132,908 is held as reserves, with the Reserves Policy stating that funds equating to six months' reserves should be held.</p> <p>The Group has submitted a budget for 2022/23 which shows an anticipated income of £175,836 against an anticipated expenditure of £218,827, resulting in an anticipated deficit of £42,991.</p> <p>Annually the Unit applies to all the Borough and Districts Councils that still run grant schemes, and receives a grant from Surrey County Council. It was able to access small Covid grant schemes during 2020/21 but its statutory funding is static and has diminished as local Councils close their grant schemes.</p> <p>The Unit will be re-tendering for a contract with SCC to provide specialist benefits advice to Carers from April 2022. It is also looking at expanding its e-training and reviewing its training fees structure. It will be applying to SCC for the Better Care Fund core grant for 2022/23 and is looking at new projects that fit its charitable purpose that will help local residents through the coming few years as the economy recovers from the pandemic.</p>

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2.2 Accounts	The Group has submitted accounts for 2020/21 which show an income of £205,506 (£194,166 in 2019/20) against expenditure of £202,350 (£205,961 in 2019/20), resulting in a surplus of £3,156 (a deficit of £11,795 in 2019/20). The sum of £198,604 was carried forward at the end of the 2020/21 year.
2.3 Support over the past five years	2021/22 – £10,000 2020/21 – £10,000 2019/20 – £10,000 2018/19 – £10,000 2017/18 – £10,000

3.0 Assessment of Application		
3.1 Key Information	<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 <p>* The Council also provides accommodation for the Unit at the Monument Way Depot, valued at £3,300 each year.</p>	Yes Yes No Yes Yes Yes Yes Yes Yes * Yes N/A Yes
3.2 Assessment	<p>Surrey Welfare Rights Unit provides expert legal advice on benefits and community care. The pandemic, changes in legislation, the transition to Universal Credit and missed applications for the Settled Status scheme are all likely to increase the unit's workload over the coming year. They provide support to public services and accurate information and guidance to our residents. Potentially this reduces some of the impact on our services. They support many of the themes in Woking's Corporate Plan 2021-22.</p> <p>In view of the Council's financial situation, it is recommended that a grant be awarded with a reduction of 10% of last year, equating to £9,000 for 2022/23.</p>	

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