

SURREY WELFARE RIGHTS UNIT – APPLICATION FOR FINANCIAL ASSISTANCE

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>	

Recommendations	
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.
Reason for Decision	To ensure the continued services of the Unit for Woking residents.
Legal Authority	S142 Local Government Act 1972
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.</p>

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	<p>Groups which refuse may place their Council support at risk, e.g. grant, concessionary rent and other assistance.</p> <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 2019/20 does not imply that a similar application in 2020/21 would be supported. In particular, it is emphasised that the Council is unlikely to be in a position to award any sums above the 2019/20 levels.</p> <p>In view of this, the applicant is to be advised to ensure that contingency plans for the Group's operations for 2020/21 have been drawn up in the event that the Council is unable to continue its support beyond April 2020. All applicants are strongly recommended to pursue alternative sources of funding and are encouraged to approach</p>

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Woking Borough Council's Community Support Team for advice and support.

The Executive has authority to determine the above recommendations.

Background Papers:

2019/20 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 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 Unit Manager (36 hours per week), Senior Welfare Rights Adviser (30 hours per week), 3 x Welfare Rights Adviser (22.5 hours per week) and Administrator (28 hours per week). All staff are line-managed by the Unit Manager. The Unit Manager 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> <p>Social Security law is more complex than 5 years ago and when Universal Credit arrives in Surrey, two systems will run in parallel for at least 5 more years, potentially bringing further problems for local residents with issues around migration, changes in circumstance and the loss of legacy benefits. Currently the advice team is working to respond to all the requests for training on Universal Credit and ensuring information resources are in place for non-advisers such as library staff and foodbank volunteers.</p>
1.4 Clients/Users	<p>1,220, comprising:</p> <ul style="list-style-type: none"> 462 male 758 female 678 disabled 305 ethnic minority 92 resident in Woking 25 aged 11-18 1,024 aged 19-65 171 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.</p> <p>For clients identified as Woking residents 160 benefit queries were</p>

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	<p>completed, mostly concerning Housing Benefit, Personal Independence Payment and Employment and Support Allowance.</p> <p>In addition talks and workshops were delivered to 424 local residents, volunteers and professionals.</p> <p>373 local advisers have also been trained across a whole range of social security topics, but in particular, Universal Credit.</p> <p>60 local organisations and teams subscribe to use the Unit's services. The Group noted that this indicates that there is no alternative service, no duplication, and specialist support and advice services are desperately needed at this time of unprecedented welfare reform.</p>
1.5 Members	N/A
1.6 Sum Requested	£10,000 (Revenue)
1.7 Project	<p>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 expertise in the particular field.</p>
1.8 Cost breakdown:	<p>Staff costs - £170,938</p> <p>Premises - rent in kind - £8,000</p> <p>Training costs - £6,973</p> <p>Governance - £6,147</p> <p>Information production - £5,202</p> <p>IT, phones and website - £4,720</p> <p>Other - £3,073</p> <p>Advice - £3,060</p> <p>Total - £208,133</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. Topics include the social security system and the issues which arise for complainants. 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. During the past year evidence was provided to the Work and Pensions Select

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	<p>Committee on the poor quality of PIP and ESA medicals. The Unit updated the Surrey guide on DLA for parents with a disabled child and continued to provide expert input into the review of the Surrey free bus pass policy. It advised Surrey's Family Service on how Universal Credit will affect local supported housing providers and Care Leavers who will soon get their rent paid direct to them instead of to the landlord. Welfare reform updates were delivered to Woking Borough Council's Overview and Scrutiny Committee and to the District and Borough's Children's Services Lead councillors and officers.</p> <ul style="list-style-type: none"> - Information: The Charity will write and circulate thousands of 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. During recent months the Unit has spoken to the Cardiac Failure Patients Group at St Peters and made two broadcasts on Carers World Radio Plus on Universal Credit and DWP disability medicals.
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2.0 Financial Background	
2.1 Budget	<p>At the time of the application, the Group held £282,382 in the bank, which is reserved as set out below:</p> <p>Remaining 2018/19 Expenditure (£150,228) less grants to be paid (£69,350) - £80,878</p> <p>Current liabilities including accounts and payroll - £56,752</p> <p>Redundancy Reserve - £27,007</p> <p>Designated Project Fund - £17,044</p> <p>Designated Contingence - £15,000</p> <p>Designated IT Replacement - £7,000</p> <p>The Reserves Policy operated by the Unit states that the aim is to keep a reserve equivalent to six months' running costs.</p> <p>The Group has submitted a budget for 2019/20 which shows an anticipated income of £176,487 against an anticipated expenditure of £208,113, resulting in an anticipated deficit of £31,626.</p> <p>Anticipated income includes SCC & Borough Grants (£133,737), subscriptions (£20,000), training delivery (£12,000) and premises/rent subsidy (£8,000). Items of expenditure include salaries inc. pensions & NI (£169,102), rent in kind (£8,000), training programme (£5,100), Citizens Advice membership (£2,958), computer costs (£2,884) and books etc (£2,550).</p>
2.2 Accounts	<p>The Group has submitted accounts for 2017/18 which show an income of £187,755 (£211,162 in 2016/17) against expenditure of £191,284 (£200,744 in 2016/17), resulting in a deficit of £3,529 (a surplus of £10,418 in 2016/17). The sum of £211,186 was carried</p>

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	forward at the end of the 2017/18 year.
2.3 Support over the past five years	2018/19 – £10,000 2017/18 – £10,000 2016/17 – £10,000 2015/16 – £10,000 2014/15 – £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 Consultee Comments	<p><u>Sylvie Marshall, Community Development Manager</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>This organisation has an important role to play with the introduction and implementation of Universal Credit supporting public services provide accurate information and guidance to our residents. With this in mind we would support the continued level of funding from previous years at £10,000.</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</p>	

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Depot.

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”, such as the Lottery and Children in Need. Funding from Councils represents around 65 per cent of their total income (FY ending 2018), meaning that, from the Charity’s perspective, its withdrawal would “almost certainly” mean closure.

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. Since 2014, Social Security appeals have risen to 47% mainly as a result of poor decision making in PIP and ESA decisions.

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 was 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.

The Unit’s preparations for the arrival of Universal Credit have been carefully planned using evidence and recommendations from other areas which have already “gone live”. Work has been taking place with partners for the past couple of years at both borough and county level, setting up plans and resources to mitigate the possible negative impacts of the new benefit, which have been widely reported. Apart from Universal Credit there are other reforms which potentially could have a significant impact on Woking residents, in particular, the limiting of welfare benefits to two children per family.

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