



## Foreword by the Chair of the Trustees

**I am pleased to introduce the Annual Report for 2014-15 for the Welfare Benefits Unit which serves York and North Yorkshire. It has been a year of unprecedented change, both for the clients we serve, and for the Unit itself.**

Nationally, the Coalition Government's wholesale overhaul of the benefits system has continued to gather pace, with complex changes to almost every single benefit.

This has placed enormous pressure on individuals who need to access the benefits system and those who advise them.

Our Unit serves a vital role in making sense of these changes, and it is clear from the feedback we receive that our work is greatly valued. We are heartened by the many positive comments about the training, the advice and the materials we provide.

For ourselves as a Unit, the last year has also seen unprecedented changes.

We were sorry to lose our highly experienced Manager, Heather Theobald; we wish her well.

We extend a warm welcome to her successor, Liz Wilson, who initially took on the role on a job share basis, but who became sole Manager in June 2015.

The Trustees were also very sorry to bid farewell to a number of colleagues, and particularly to Jonathan Bradshaw CBE, the Chair. Jonathan set up the first version of the Unit back in 1968.

He has been involved with it ever since, helping to establish the Unit as a model of good practice that is recognised nationally. Jonathan will continue with his academic work in this field, and will always be a friend to the Unit. He is a hard act to follow, but the Trustees are determined to carry on with his vision.

We entirely recognise the pressures on our funders – and are very grateful for their continued support. They know, as we do, that our work has never been more needed.

**Paul Murphy**  
Chair of the Trustees

A handwritten signature in orange ink, appearing to read "Paul Murphy".

## Our Vision

The Welfare Benefits Unit aims to maximise benefit take-up, helping to reduce the incidence and impact of poverty and thereby improving health, well-being, financial

and social inclusion. We provide independent support to advisers and front-line workers through our advice line, publications, training, consultancy and campaigns.

In setting our objectives and planning activities the Trustees have taken into consideration the Charity Commission's general guidance on public benefit.

# Our Services

The National Audit Committee, Welfare Reform – lessons learned (2015), reported that the DWP has introduced change to nearly every benefit it manages, covering 30 distinct programmes. This had led to 'some hard lessons with significant financial and human costs'. Claimants face an increasingly complex benefits system and often have to challenge decisions to ensure correct entitlement. As a result advisers are faced with increasingly complicated queries and situations, and the need for expert advice has increased.

## Advice Line

Our advice line is available to advisers in York and North Yorkshire, providing specialist advice on welfare benefits and tax credits.

**"Always return calls with concise and correct information."**

**"Excellent, professional service."**



## Training Courses

We develop and deliver an extensive range of benefit training courses – our well-regarded 3-day Introduction to Benefits and Credits is complemented by additional courses including disability, carer and older people benefits.

**"Comprehensive training to support frontline advisers deliver services to clients."**

**"I feel like I have had new batteries put in."**



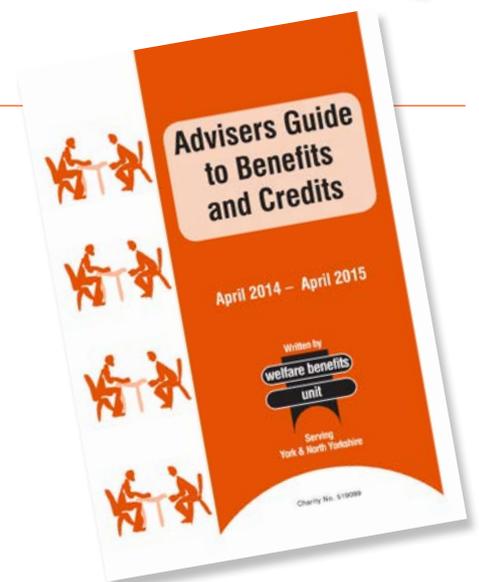
## Publications

Our publications include our essential Advisers Guide, used by advisers within a range of organisations including Citizens Advice, social services teams, voluntary organisations and housing providers.

We also produce guides for members of the public for circulation in York and North Yorkshire.

**"The Advisers Guide is essential in our work."**

**"Very valuable resource."**



## Consultancy

The Welfare Benefits Unit provides consultancy services including evidence assessment and calculations for research projects and updating of information and training. Working in partnership we have collated evidence and contributed to campaigns identifying need within York area and nationally.

**“Thanks for your help with this, and enthusiasm!”**

**“The motivation is always to improve the lot of the more vulnerable.”**



## Project Work

Project work in 2014/15 included the Help in Hand project, supported by Lloyds TSB.

This provided support to parents claiming Disability Living Allowance for their child.

The Benefits Advice and Tribunal Support service, funded by the Big Lottery and City of York Council, advises front-line workers who are helping their clients challenge DWP decisions. Both projects offered valuable support to claimants in stressful circumstances.

**“Was an incredible help that provided professional, helpful advice at a time when I was feeling overwhelmed.”**

**“This has been an invaluable resource for our advisers and clients.”**



## Liaison

Liaison with other organisations and enabling advisers to network at Forum meetings provides opportunities for joint working and increased understanding of supporting roles.

**“Avoiding working in isolation.”**

**“Useful talking shop.”**



# Finances

The Welfare Benefits Unit is supported by City of York Council and North Yorkshire County Council.

Additional revenue raised through training and publications sales is essential to ensure service provision. Project funding has provided valuable assistance enabling us to provide additional services, strengthening the role of the Welfare Benefits Unit and the support vulnerable claimants receive.

Full copies of our accounts are available on request.



# Figures

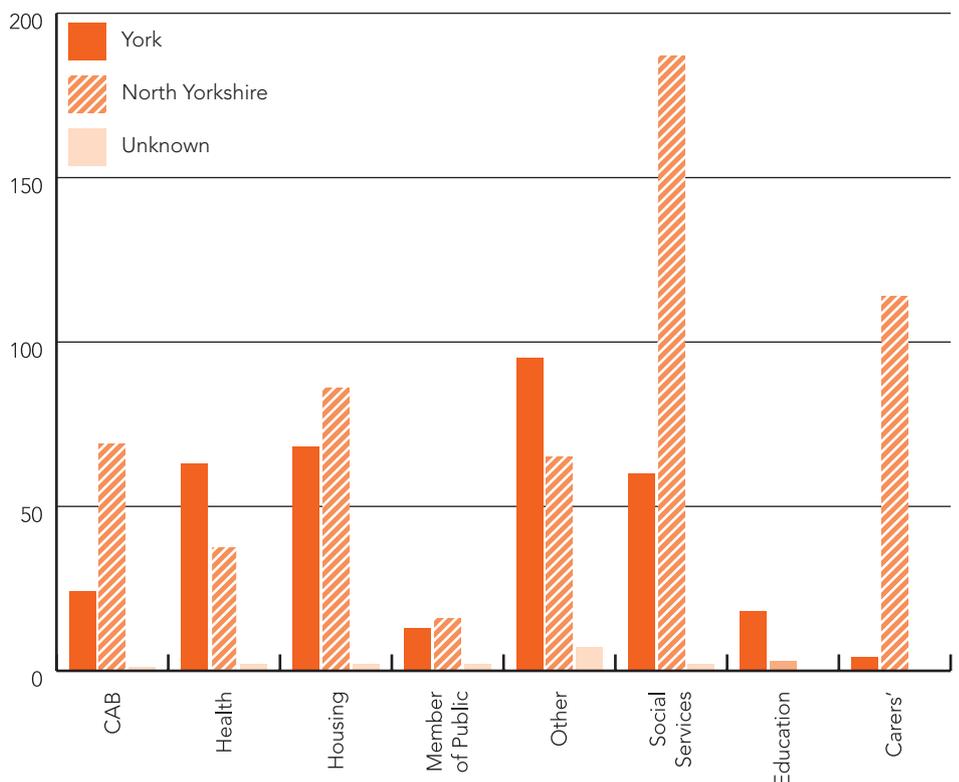
DWP figures for 2013/14 (published in 2015) continue to show that high levels of income-related benefits do not get claimed.

Take-up is estimated around **60%** for Pension Credit and **55%** for Jobseeker's Allowance. Under-claiming for Income Support, Employment and Support Allowance and Housing Benefit is lower but the estimates still show between **20 and 30%** of people do not claim their full entitlement. It is essential that accurate and comprehensive advice is available to ensure that income is maximised.

In 2014/15 the advice line received **939** calls generating **1410** queries. **58%** of the calls came from North Yorkshire and **39%** from York. We continue to receive calls from a wide range of organisations, providing support to clients facing challenging changes of situation. Over half of the calls involve complex queries requiring advanced reference material or extended responses.

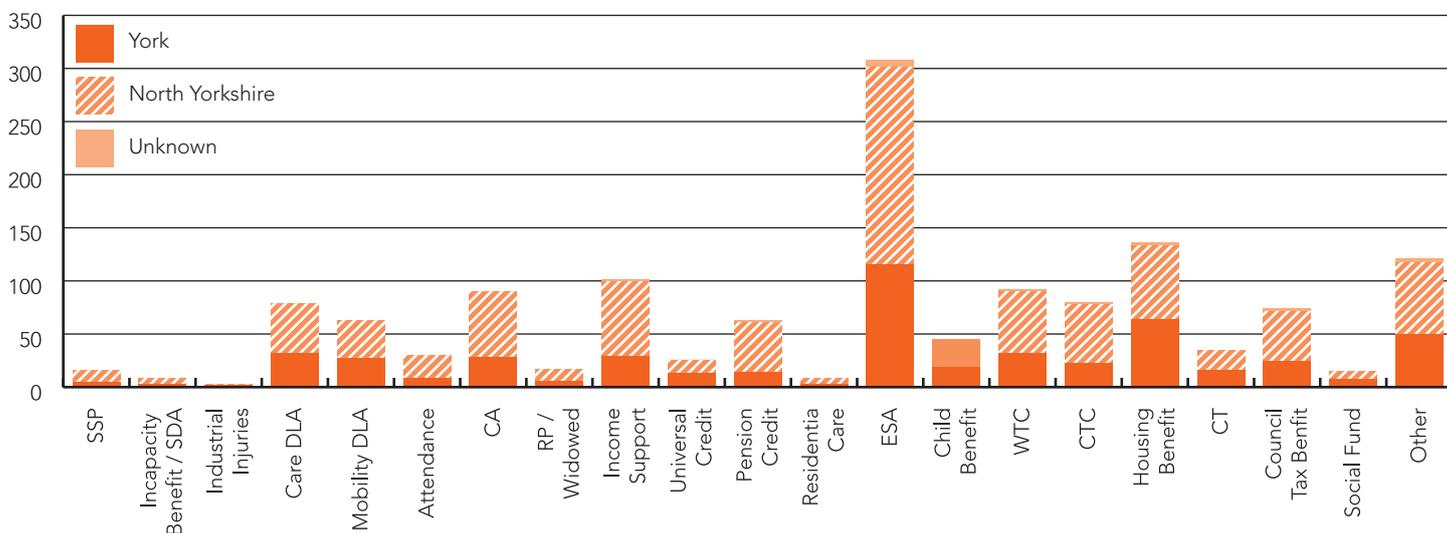
Seemingly simpler queries can involve supporting the enquirer get to grips with a new area of welfare rights.

Number of calls by area and type of organisation 2014 - 2015



Employment and Support Allowance continued to be the main area of concern reflecting the complexity of this sickness benefit and the difficulties people face going through the claims process and medical assessment.

### Benefit queries by area



The Welfare Benefits Unit's training is provided contractually to City of York Council and North Yorkshire County Council staff, and is also a source of revenue.

The evaluations shape further training courses and the positive results and comments continue to show that the courses are successfully providing people essential welfare benefits knowledge. **99%** of trainees report that the session was good or very good at meeting their needs in relation to their current or future work.

Some of the training in York was provided to the Advice York project and included briefings on Universal Credit.

### Number of Delegates

Quarterly Training      Requested training

#### City of York

City of York employees	46	50
Citizens Advice Bureau	41	20
Others (eg voluntary organisations)	37	30

#### North Yorkshire

NYCC employees	89	57
Citizens Advice Bureaux	29	1
Others	74	25

#### Outside the area

24      84

**Totals**      **341**      **267**

**Talks**      **1**

# Next Steps

The team at the Welfare Benefits Unit faced many challenges in 2014/15 and worked hard to ensure continuity of service whilst their manager was on long-term sick leave.

Heather's decision to retire was met with sadness whilst also welcoming Rachel and Liz who had both previously worked for the Welfare Benefits Unit and were keen to bring their experience and commitment to providing a well-respected, quality service, consolidating existing practice and looking for project opportunities for the future.



# Management Committee and Staff

## Management Committee

**Paul Murphy**  
Chair

**Robert Jenkinson**  
Treasurer

**Christine Skinner**

**Charlotte O'Brien**  
resigned May 2015

**John Robertshaw**  
resigned March 2015

**Jonathan Bradshaw**  
previous Chair, retired  
November 2014

**Julie Gunnell**  
resigned November 2014

**Sheila Crosby**  
retired November 2014

## Staff

**Heather Theobald**  
Manager to October 2014

**Liz Wilson**  
Joint Manager from November  
2014, Manager from June 2015

**Rachel Boyes**  
Joint Manager from  
November 2014 to May 2015

**Amy Blythe**  
Welfare Rights Adviser

**Andrew Davies**  
Welfare Rights Adviser

**Jane Helm**  
Administrator

**Richard Porter**  
Welfare Rights Adviser

**Wendy Smart**  
Help in Hand Project, to  
March 2015

**Carron Whorley**  
Administrative Assistant