

Foreword from the Chair

**Welcome to our review of the 2017-18 year.
It has been another significant period in the
life of the Welfare Benefits Unit.**

This has been the first year of operation under our new five-year contract with North Yorkshire County Council, which includes extension of our advice line service from 15 hours a week to 40. The result – combined with understandable anxiety and confusion about recent benefit changes – has been a 50% increase in the volume of calls we have received.

Dealing with this demand, with no increase in our overall resources, has presented some inevitable challenges – but the team have risen to it, and this is reflected in the very positive feedback we receive. More importantly, the end result has been accurate and confident advice passed on to those who receive benefits – in some cases leading to the identification of additional entitlements running into thousands of pounds.

Our regular and bespoke training courses continue to be very popular and to attract great feedback for their accuracy and topicality. Such was the demand, we had to lay on an extra course on Universal Credit.

More people now access their advice electronically, and the WBU has moved with the times

with improvements to our e-bulletins and electronic factsheets. Even so, demand for our paper-based Advisers' Guide has still held up remarkably well.

During the year, City of York Council confirmed a four-year funding contract to sustain the WBU service. The Trustees are extremely grateful to the continued support of our main funders – North Yorkshire County Council and City of York Council – especially given the enormous financial pressures they face. This reflects the high priority they attach to ensuring that their staff are in the best possible position to support the most vulnerable amongst our local population.

And finally... it's our birthday! A rather special one – the Welfare Benefits Unit is 50 years old this year. You can read more about our history elsewhere in this report.



Paul Murphy
Chair of the Board of Trustees

Role of the Welfare Benefits Unit

The Welfare Benefits Unit offers specialist welfare benefits advice to those who work with members of the public. Our experienced advisers provide independent support through our advice line, publications, training, consultancy and projects.

We provide:

- ✓ Accurate advice, training and publications about an increasingly complex benefit system.
- ✓ A professional and quality assured service to ensure that specialist advice can be accessed through local support agencies and cascaded to a wide number of individuals.
- ✓ Information to promote the take-up of benefits and awareness of entitlement.
- ✓ A focal point for welfare rights work across North Yorkshire and York offering networking opportunities, updating and information.

The Welfare Benefits Unit aims to maximise benefit take-up, helping to reduce the incidence and impact of poverty and in doing so improve health, well-being, financial and social inclusion.

Celebrating 50 years



A brief history of the Welfare Benefits Unit

The WBU began life as an initiative by the York branch of the Child Poverty Action Group (CPAG). In 1968 the group, whose members included academics, lawyers, social workers and students from the University of York, began to investigate how welfare rights initiatives could promote greater awareness and take up of benefits – especially if they were ‘out on the streets’. This led to the setting up of a market stall as an advice centre: every Friday, in Newgate market in York, the stall appeared, sandwiched (legend has it) between a ladies’ hosiery stall and a charity cake stall.



One person who could regularly be seen in those days handing out advice to people was a young academic from the University, Jonathan Bradshaw. He went on to chair the WBU’s Management Committee and to be closely involved with the WBU for most of the next 50 years.

In its first 18 months, the group dealt with 1,500 enquiries, some of which required further in-depth advice and assistance. Eight people were helped with cases that were taken as far as tribunal. One of these was the first Supplementary Benefit case ever appealed to the Divisional Court. By the late 1970s, those involved were able to secure central government urban renewal programme funding to establish a more permanent welfare rights organisation in the city. This heralded the arrival of York People’s Rights (YPR).

During the 1980s, YPR evolved and developed a new role as a ‘second-tier’ agency, providing advice and training

to people who – as part of their jobs – advised clients about benefits. In particular, it became a resource centre for social workers, who were often asked questions by their clients about benefits. Other advisers also began to call YPR for advice.

In addition, the WBU began to take on a training role.

When the urban regeneration funding programme ran out, YPR had to find new supporters. North Yorkshire County Council agreed to contract with YPR as an advice agency to provide benefits advice across the whole county. YPR changed its name to North

Yorkshire People’s Rights and in 1983, in conjunction with Citizens Advice throughout North Yorkshire, ran the first of a number of take-up campaigns, which were judged a great success. This encouraged the County Council to continue to invest in the WBU, and it remains our principal funder to this day – joined latterly by City of York Council following its creation in 1996.

During the 1990s the WBU developed a portfolio which is more like that which pertains today – becoming solely a second-tier advice agency offering a telephone advice line, consultancy and case work around complex benefit issues, and a comprehensive training programme. In addition, the WBU began to publish guides and booklets, and in 1989 the first Advisers’ Guide came out – which rapidly became very popular, with a national distribution running into the thousands.

The WBU has occupied a number of different premises in York over these years, before moving into its present accommodation in Priory Street in 1997. Latterly it changed its name to the Welfare Benefits Unit and began to employ fully-trained welfare benefits advisers.

In 2016, the WBU obtained Charitable Incorporated Organisation (CIO) status, with a Board of Trustees rather than a Management Committee. Thanks to the continuing support of our funders, the Welfare Benefits Unit has a future as secure as it is reasonable to expect in these turbulent times. As Universal Credit continues to roll out across York and North Yorkshire, our services have never been more needed.

Figures

Advice Line (phone/email)

In 2017/18 the advice line received 1,469 contacts generating 2,639 queries; more than 50% increase on the previous year. Over two-thirds of the contacts involve complex queries requiring advanced reference material or extended responses.

Many voluntary organisations, across North Yorkshire and York, used the advice line including: AgeUK; Citizens Advice; Royal British Legion; MacMillans; hospice services; homelessness prevention, housing and tenancy support organisations, family support and domestic abuse services; charitable benevolent societies; advocacy, armed forces and carers groups.

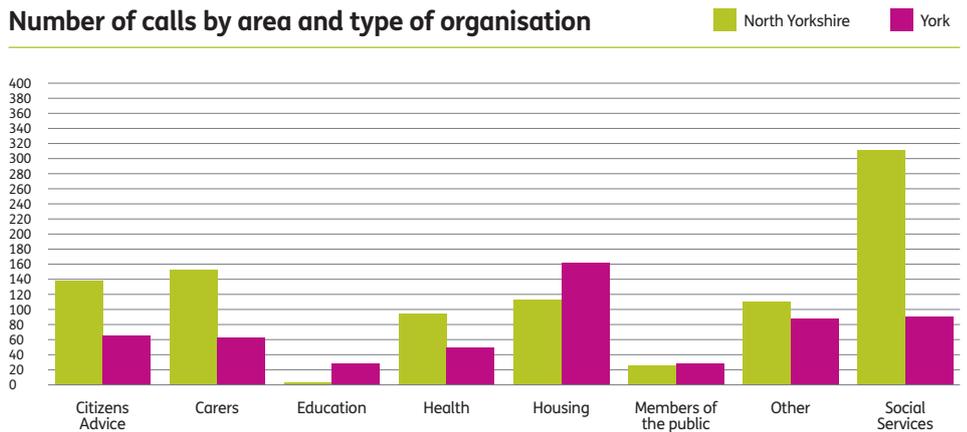
We also receive calls from statutory services including hospital social workers, family support workers, youth advisers, education welfare officers, social services' benefits and care charges assessors.

Queries received cover the whole benefit system with the main queries focusing on Universal Credit, Employment and Support Allowance, Personal Independence Payment and Carer's Allowance.

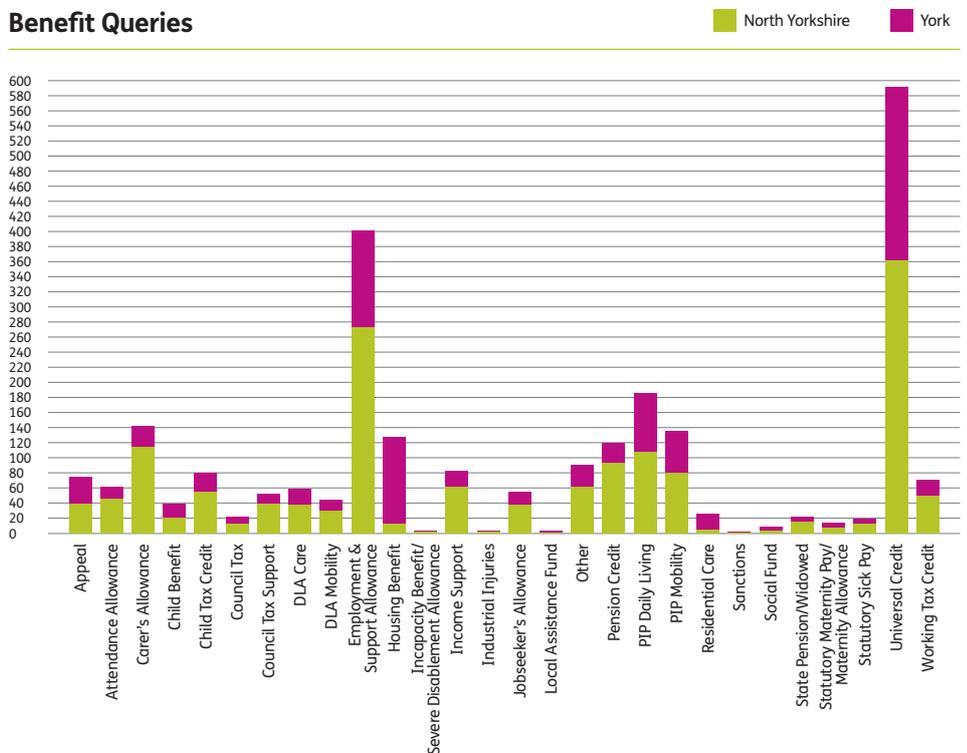
Training

The Welfare Benefit Unit's training is provided contractually to City of York Council and North Yorkshire County Council staff, as well as to North Yorkshire Citizens Advice staff and volunteers. A total of 36 courses were provided, both contracted and bespoke, to 575 delegates. The most popular being our 3-day Introduction to Benefits and Credits course and Universal Credit.

Number of calls by area and type of organisation



Benefit Queries



Our training evaluations show that the main descriptors for the courses were “useful”, “interesting”, “valuable”, “challenging” and “practical”. 96% of attendees thought that the course “good” or “very good” in relation to meeting their needs for work.

In total the WBU delivered courses from the WBU training programme to 273 trainees, 268 from North Yorkshire and York.

Bespoke training provides an important revenue stream whilst offering quality provision; supporting those in the statutory, voluntary and housing sectors to work effectively with claimants. This year we provided training to 302 trainees at City of York Council, NY Advocacy, National Association Student of Student Money Advisers, Age UK, Horton Housing and JRF-funded sessions accessed by several community organisations in York.

Training

	Number of Delegates	
	Quarterly Training	Bespoke Training
City of York		
City of York employees	64	132
Citizens Advice Bureau	1	0
Others (e.g. voluntary organisations)	20	74
North Yorkshire		
NYCC employees	88	0
Citizens Advice Bureaux	55	0
Others (e.g. voluntary organisations)	40	70
Outside Area	5	26
Totals	273	302

Publications

Our concise Advisers Guide continues to be very well received. Provision is provided free, under our contracts, to City of York and North Yorkshire County Council staff, and Citizens Advice in North Yorkshire; more than 1000 were distributed. National sales of the Advisers Guide supports the work of the WBU and approximately 2000 copies were sold.

The WBU also produce leaflets for members of the public (Benefits for older people and Benefits if you are disabled); nearly 4000 copies were distributed regionally. This resource provides clear information and supports advisers in their work.

Trustee Board & Staff

Trustee Board: 2017 – 2018

Paul Murphy | Chair

Robert Jenkinson | Treasurer

Prof Peter Ball

Richard Bridge | from Sep 2016

Helen Edwards

Dr Charlotte O'Brien

Dr Christine Skinner

Nicola Welch

Staff: 2017 – 2018

Liz Wilson | Chief Executive

Kathryn Ayres | Office Coordinator

Amy Blythe | Welfare Rights Adviser

Andrew Davies | Welfare Rights Adviser

Kate Fincham | Welfare Rights Adviser

Jenny Shaw | Welfare Rights Adviser
from April 2017

Kathryn Wordsworth | Welfare Rights Adviser
from March 2018

Finances

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

The continued recognition of the value of specialist benefits advice for the residents of these areas is appreciated and provides a firm foundation for the revenue-raising carried out by the Welfare Benefits Unit.

Additional revenue raised through training and publication sales is essential to ensure service provision.

Our Universal Credit Focus project, funded by City of York Council's

Financial Inclusion Group, extended advice provision for those who supported new UC claimants as UC was rolled out in York. Briefing sessions, e-mailings and factsheets provided extra detail and information. The project also monitored claimants' experience of UC in the first year of implementation in York area.

In 2017/18 we also received JRF York Committee funding which provided support with WBU development costs.

Full copies of our accounts are available on request or from the Charity Commission website.

Welfare Benefits Unit

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Advice Line

For advisers in North Yorkshire and York

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