



CASE STUDIES

Informed decisions support financial stability

Role of the Welfare Benefits Unit

The Welfare Benefits Unit offers specialist welfare benefits advice to those who work with members of the public.

We aim to maximise benefit entitlement, helping to reduce the incidence and impact of poverty and in doing so improve health, well-being, financial and social inclusion.

Our experienced advisers provide independent support through our:

- \ advice line
- \ publications
- \ training
- \ consultancy
- \ projects

“You always give me useful guidance and advice. I am very thankful that I can contact you when I hit a knotty problem – it makes a big difference to the help I can give my clients.”

Maximising income for a disabled couple when their grandchild moved in: claiming Universal Credit immediately would have reduced their benefit income. We advised the Benefits and Assessment Officer about proactive action needed, protecting over £1,000 in the first three months of the claim and increasing regular payments.

Continuing in education following in-hospital mental health support: detailed advice, including case law, ensured that the student was able to retain Universal Credit housing costs and maintain his tenancy whilst receiving therapy. Further, his Occupational Therapist was able to help him establish limited capability for work to ensure Universal Credit could continue once he returned to studying.

Carer affected by Universal Credit requirements to look for work: identifying officially as a carer would reduce the amount of benefit received by her dad who was in very poor health. However, work-related responsibilities were proving too difficult to meet. We provided clear advice so that the Citizens Advice volunteer could outline choices around the situation and the impact of any decision made.

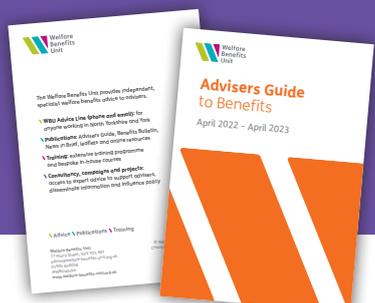
Help with mobility costs after pension age: a terminally ill patient receives Personal Independence Payment and has restricted mobility. Advice of strict criteria was given to the cancer support adviser to support a late application for PIP mobility component, including specific points of note when contacting the DWP.

2000
advice line hours –
accessed by more than
290 advisers across
79 organisations
“Absolutely first class”



Training: *“Good, informative and the teaching excellent!”*

Advisers Guide:
“A must have!”



Foreword from the Chair

Welcome to our review of the 2021–2022 year.

It's sometimes hard to appreciate the significance of events when you are living through them. It appears that the last year has marked a permanent, and in many ways unwelcome, shift in the way we live. For a start, while the pandemic may have peaked, and we are learning to live with Covid, its long-term impact on people's mental and physical health is only just beginning to become apparent. This, in turn, has affected many people's security of employment. At the same time, a combination of global and domestic events is leading us rapidly down a path towards a cost-of-living crisis such as we have not experienced for decades.

For the team at the Welfare Benefits Unit, these issues strengthen our commitment to provide an excellent, supportive service. Certainly, the demand for our expert, independent advisory service is as high as ever. That advice has to be updated constantly and rapidly in response to ever-changing government announcements. At the same time, the team has continued to provide the majority of our services from remote locations, including delivery of our training courses over the internet. While not without their challenges, these new ways of working, which are rapidly becoming 'the new normal', have also brought benefits in terms of widening our reach and reducing our carbon footprint.

Once again, I would like to convey the appreciation of the Board of Trustees for everything the team has achieved. The advice service has operated without a break and our online training continues to receive magnificent feedback. The team has remained stable and committed throughout the year, as has the Board of Trustees, whom I would also like to thank for their advice, challenge and support.

We are also deeply grateful to all our funders for their continued support even while their own finances are under pressure. In particular, our major contracts with North Yorkshire County Council and City of York Council have been renewed to 2024 and 2025 respectively. This means we can approach the next two years with confidence.

Our work is vital. It has real impact on people's lives. There are statistics and quotations throughout this report to back this up. I hope you enjoy reading it.



Paul Murphy
Chair of the Trustee Board

Our Services

Changes relating to the pandemic continued to add complexity and rapid adjustments in the benefit system.

Welfare Benefits Unit provides:

- ✓ 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.
- ✓ Social policy action to influence local and national decision-making, working with partners to promote claimants' rights.

Government responses to the ongoing pandemic and changes in employment and peoples' circumstances necessitated detailed advice around benefit entitlement and process. The start of the year saw the continuation of Covid-19 related amendments and relaxations which altered or ended as the year progressed. There has been a myriad

of changes linked to Universal Credit, relating to regulatory updates, pandemic and cost of living responses, and case law decisions. This included: the introduction of the severe disability transition element for people moving from legacy benefits; alteration of work allowances and the earnings taper; a resumption of managed migration; further restriction of access for disabled students. It has become increasingly important to be aware of entitlement before claiming Universal Credit to ensure that money is not lost simply because steps are not taken in the most favourable order. For example, people who are unable to work can lose extra financial support if they give up Employment and Support Allowance the day before claiming Universal Credit rather than on the day of claim; similarly, someone coming out of hospital can be better-off by £120 or more each month if they establish with the DWP that they live alone before they make a Universal Credit claim.

“Such a useful and informative service.”

“I always receive good advice, everyone is friendly and helpful, it’s great to have access to such a great service. WBU training is also really useful and always well presented by knowledgeable workers.”

2021 saw the end of the grace period following transition from the EU. The government response allowed continuation of benefit payments on an extra statutory basis, data matching to identify residents and late application to the Settlement Scheme if good cause. This helped to mitigate some of the expected hardship and loss of benefit entitlement. Advisers need to carefully assess the immigration status of EEA clients before giving advice as those now subject to immigration control could lose the right to stay in the UK if they make a claim. Our experienced team provide clear guidance about the information needed to assess benefit entitlement and offer in-depth advice; complex queries are referred to an external adviser to maximise the support that can be given.



CASE STUDIES

Moving into work whilst managing a health condition: taking a step back into work can be daunting and we were able to advise the financial capability officer how different options would affect benefit entitlement. We calculated whether their disabled client would be better off on Universal Credit.

EEA national struggling to establish right to reside after 14 years residence: without proof of application to the Settlement Scheme the client no longer had a right to remain in the UK and was unable to claim Universal Credit. Clarification of their position and detailed guidance ensured that the mental health social worker was able to help her gather the information needed to claim Universal Credit and avoid destitution.

Advice Line

 **Advice line** 

 **6** specialist advisers

 **All day**
Monday to Friday

 **1290**
contacts

 **2561**
benefit issues

 **2/3** require detailed or complex advice

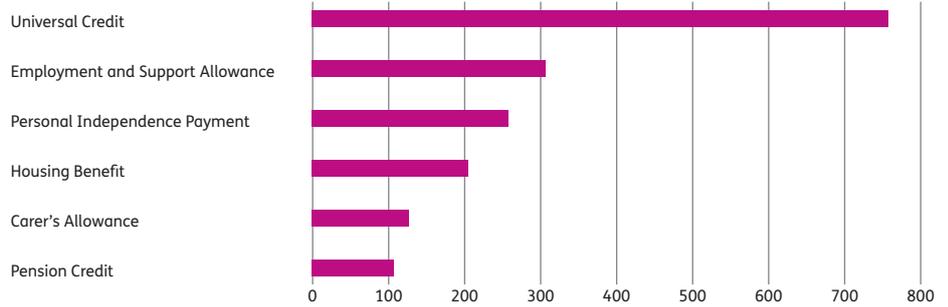
We work in partnership with organisations to ensure that they can offer in-depth support, enabling residents to make informed choices to sustain or improve their financial security. Access to advice, often at times of unexpected change, distress and uncertainty, ensures that positive choices can be made.

We support advisers from a range of organisations, both experienced and those for whom benefits advice is a peripheral part of their role.

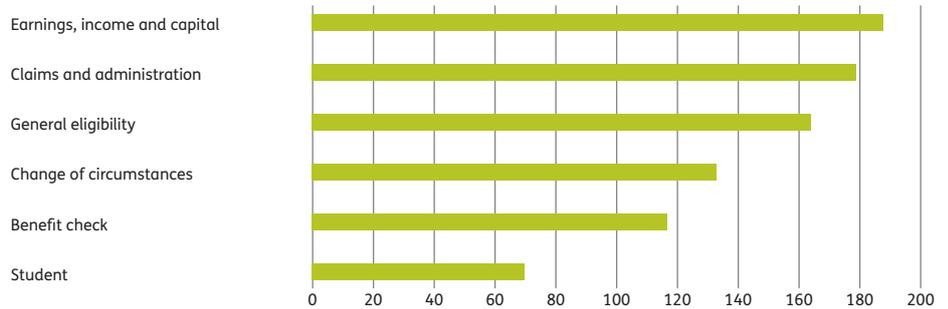
Our twice-yearly surveys produce very positive results:

“The service is excellent and very responsive. The advice I was given was thoroughly explained and given with specific consideration to my client’s circumstances. I really appreciate the support I get from WBU.”

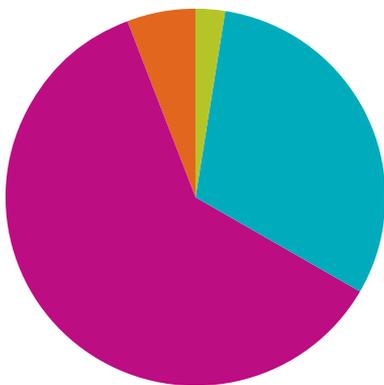
Top six benefits



Top six issues

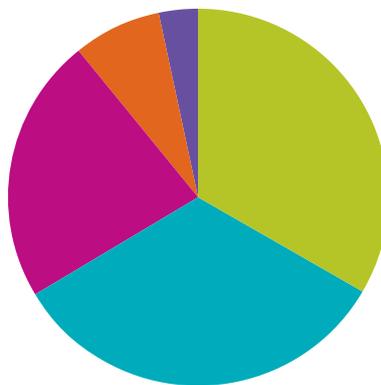


Complexity



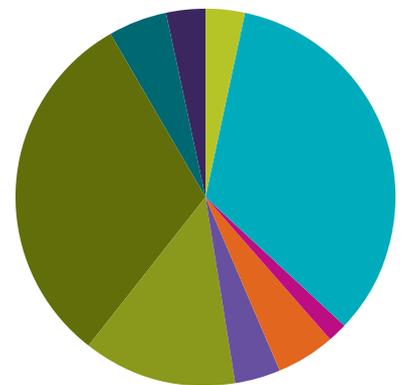
- Signposting
- General
- Detailed / complex
- Advanced

Outcomes



- Increase in income/benefits
- N/A general query
- No change
- Decrease in income/benefits
- MR/appeal submitted

Organisation type



- Carers
- Local Citizens Advice
- Education
- Health and Disability
- Member of the public
- Housing
- Local authority
- Older persons
- Other

Training

Welfare Benefit Unit training is provided contractually to City of York Council and North Yorkshire County Council staff, as well as to North Yorkshire Citizens Advice. The courses are open to other advisers; representing an invaluable source for information-sharing as well as providing independent revenue.

“Really enjoyed this course it was very informative.”

Courses reflect the queries we receive and provide an up to date, interactive learning experience. Our trainers are all qualified, experienced and dedicated to high quality provision, responding to high demand and consistent benefit changes.

“Very good, helpful trainers. It was very good. Liked the exercises, they broke up the content.”



100
hours training



260
individuals

Our Courses

- \ Introduction to Benefits
- \ Universal Credit
- \ Benefits Overview
- \ Benefits for ...
 - \ State Pension Age
 - \ Students
 - \ Families
 - \ People with mental health problems
- \ Personal Independence Payment



82
organisations

Publications

The WBU Advisers Guide to Benefits is a concise annual publication which provides an overview of welfare benefits, including eligibility and calculation. It is written for people who give information and advice, with its clear format ideal for accuracy and quick reference. It is an invaluable resource, currently used across a wide range of statutory and voluntary organisations, including advice, community, health, housing and probation services.

Our Benefits e-Bulletins and News in Brief keep advisers up to date on changes throughout the year. We also provide online factsheets and other resources. Our disability and State Pension age leaflets can also be downloaded from our website, providing a useful resource for advisers.

“I get an Advisers Guide to Benefits each year and I find it invaluable.”

2000
orders to over
400
organisations
and individuals.

Forum meetings, social policy and collaborative working

WBU liaise with CPAG and in 2021/22 referred two cases to their Early Warning System. One case, relating to Way to Work obligations, may be taken forward to judicial review.

Response to consultations enables us to present the experience of claimants based on the cases we receive and our specialist knowledge of the benefit system. We submitted a response to the Health and Disability Green Paper and local Council Tax Reduction Schemes. We also support research and identification of relevant cases for judicial review by forwarding requests for participants and providing test cases (eg. University of York research into the Benefit Cap and two-child limit).

Funding from City of York council's Financial Inclusion Steering Group

supported proactive follow-up, in-depth work, training and development activity. Whilst this Advice Extra project provides broader support for York residents, the learning around activities supports our wider service and strengthens our social policy action.

Biannual forum meetings

- \ Specialist briefings
- \ Benefits rules updating
- \ Information sharing
- \ 2 meetings
- \ 62 attendees

Finances

The Welfare Benefits Unit is supported by North Yorkshire County Council and City of York Council. These arrangements have been renewed to 2024 and 2025 respectively. Additional revenue raised through training and publication sales is essential to ensure continued service provision.

Specialist benefits advice supports the work of staff and volunteers in the statutory and voluntary sector, enhancing the lives of residents. Funding recognises the importance of supporting people to make informed decisions, ensuring financial stability and promoting wellbeing.

Additional funding enables us to enhance our service offer. We received funding from City of York's Financial Inclusion Steering Group to fund Advice Extra, offering in-depth support and training opportunities to advisers in York. We also received essential funding from Two Ridings Community Foundation and JRHT York Committee supporting core costs, including equipment purchases and an IT upgrade.

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

Trustee Board & Staff 2021/22

Trustee Board

Paul Murphy: Chair
Richard Bridge: Treasurer
Prof Peter Ball
Heather Brock
Helen Edwards
Prof Charlotte O'Brien
Mark Taylor
Nicola Welch

Staff

Liz Wilson: Chief Executive
Jules Dymond: Advice Service Manager
Kathryn Ayres: Office Coordinator
Andrew Davies: Welfare Rights Adviser
Kate Fincham: Welfare Rights Adviser
Jenny Shaw: Welfare Rights Adviser
Kathryn Wordsworth: Welfare Rights Adviser

Welfare Benefits Unit

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