

Role of the Welfare Benefits Unit

The Welfare Benefits Unit provides expert welfare benefits advice to advisers and supporters who work with the public.

We aim to ensure people access the financial help available to them, especially those who most need it. We work with partners to reduce the incidence and impact of poverty and by doing so improve health, well-being, financial and social inclusion.

Our experienced advisers provide independent support through our:

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

Support with complex decisions to enable positive change

Residents claim benefits for a wide variety of reasons to build a stable and sustainable future – often a combination of many factors such as topping up low earnings, helping with childcare costs, financial support whilst caring, disability-related costs, easing resettlement as a refugee, meeting education costs.

Receiving expert advice can make complicated life situations easier to manage, help maintain claimant responsibilities and support confident decision-making.

Welfare Benefits Unit works in partnership with organisations and provides an additional resource to the non-profit sector – improving effectiveness, enhancing outcomes and supporting skill development and confidence.

“We got a fantastic result. The client is really pleased! I’m very pleased too! Having the WBU to discuss this with step by step throughout the long process of 2 appeals and a Tribunal has been really helpful, reassuring, and encouraging.”

CASE STUDIES

2000

advice line hours – accessed by more than 280 advisers across 76 organisations

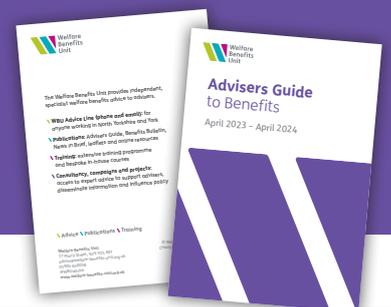
“Invaluable service from very polite, friendly and knowledgeable staff.”



Training:

“The course was excellent. Great balance of information and exercises.”

Advisers Guide:
“I recommend it to everyone ... in the advice world!”



Foreword from the Chair

Welcome to our review of the 2022–23 year.

Welcome to our latest Annual Review. Not for the first time in recent years, external events have had a massive impact on those with whom we work and their clients. War in Europe and economic turmoil has brought the unwelcome return of double-digit inflation, which always seems to hit hardest those who can least afford it. In addition to which, Universal Credit migration has continued to proceed (albeit at a slower pace than originally envisaged) and is increasingly affecting those in low-paid work.

Against this background, the Welfare Benefits Unit has continued to provide invaluable, impartial advice and training. Our experienced team of staff have now wholly adapted to a hybrid model of working, which includes joint time together in the office where complex cases can be discussed and expertise shared.

Feedback on our service continues to be exceptionally positive. The Trustees are very grateful to them, as we are to our funders.

Looking ahead, we believe we are in a strong position to tender for a renewed contract from North Yorkshire Council. We also intend to develop further our offer so that we can realise new sources of income – while still maintaining the high quality core service which is our hallmark. However you interact with us, you can always rely on our support.



Paul Murphy
Chair of the Trustee Board

Our Services

Our expert advisers provide navigation through a complex benefits system.

“Such a useful and informative service.”

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.

“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.”

Clear information to ensure affordability of childcare during mum's ill-health: advice about the interaction of rules around Statutory Sick Pay and childcare costs ensured that the family were aware of their choices whilst dad continued in full-time work. Clarification of Universal Credit rules made the family aware of some difficulties in

accessing childcare costs as mum's ill-health continued and the Benefits and Assessment Officer was able to discuss concerns with them and signpost to other support. Problems with access were reported to Child Poverty Action Group's early warning system to highlight issues and identify possible future challenges.



Advice Line



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.

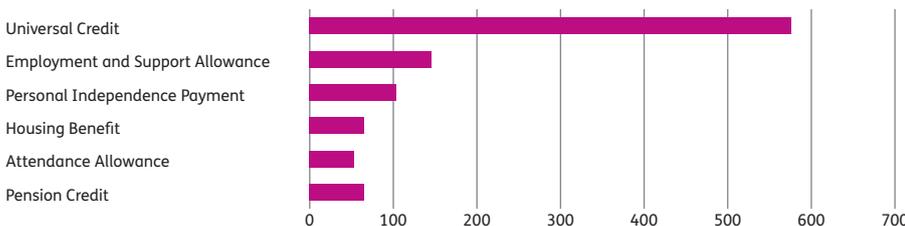
Around three fifths of contacts included Universal Credit; we expect this to continue to increase as the

government moves forward with migration from legacy benefits. One-fifth of queries were for families with children and two-thirds related to households with a disabled person.

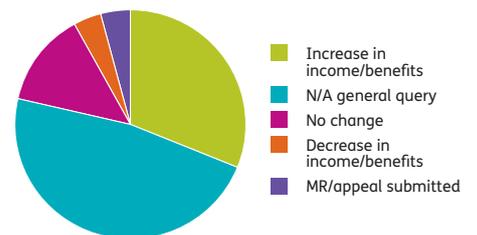
“That the advisers are experts goes without saying. Equally importantly, they engage well and there is always good dialogue, explanations and evidence, case law or legislation, to support their answers. Very professional.”

WBU continued to receive funding from Improving Finance, Improving Lives (CYC Financial Inclusion Steering Group) to run the Advice Extra project. This had three main strands: follow-up and in-depth advice provision; subsidised training of York advisers and briefings on UC migration. This funding, continuing in 2023/24, allows us to build on our core service and provide a broader range of support to York advisers and other agencies.

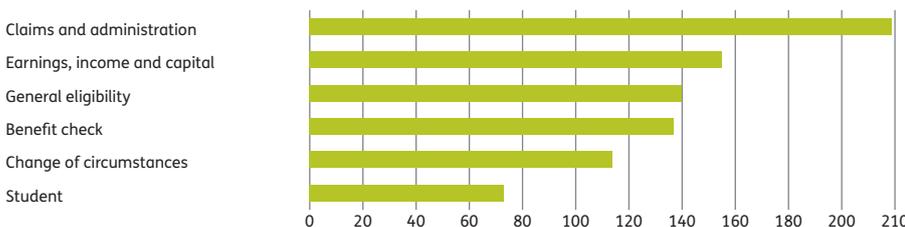
Top six benefits



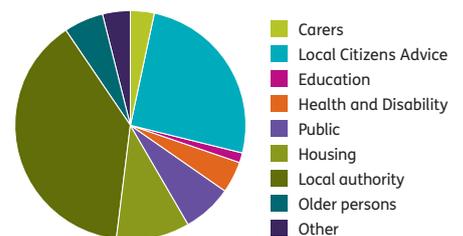
Outcomes



Top six issues



Organisation Types



Training

Welfare Benefit Unit training is provided contractually to City of York Council (CYC) and North Yorkshire Council staff, as well as to North Yorkshire Citizens Advice. The courses are open to other advisers nationally with training revenue supporting quality provision of the WBU service.

Our training programme reflects the needs of those advising on welfare benefits, providing introductory level courses as well as those aimed at experienced advisers. Our trainers are all qualified, experienced and dedicated to high quality provision, responding to high demand and consistent benefit changes.

“The course was excellent. Great balance of information and exercises. Nice to have very knowledgeable trainers.”

This year we provided our popular three-day Introduction to Benefits course an additional four times due to high demand. Online provision attracts advisers from a wide geographical area.

“Always know I’ll learn something despite offering benefits advice to terminally ill for 12 years. Always so impressed with [this trainer’s] clear delivery style and incredible knowledge.”

Our Courses

- \ Introduction to Benefits
- \ Universal Credit
 - \ Introduction
 - \ Migration
 - \ Deductions
 - \ Housing Costs
 - \ Income and capital
 - \ Work
- \ Benefits for State Pension Age
- \ Benefits for Disabled Young People
- \ Benefits Overview
- \ Limited Capability for Work
- \ Disability and Carer Benefits



210
hours training



280
individuals



88
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. In 2022/23 we sent out over 2,000 orders to nearly 400 organisations and individuals.

“So accessible and easy to understand. Makes my job so much easier. Just love it.”

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

“Up to date information written in a clear and understandable way ... useful for myself but also clients.”

Other online resources include our benefit factsheets which provide in-depth information on specific areas (eg Universal Credit and self-employment) as well as a quick-reference Benefits Checklist and a comprehensive resources list.

Clarity about entitlement ensured urgent action was taken to support a couple unable to work due to ill-health: the transition from benefits for working age claimants to those who are retired is complex and difficulties can arise particularly for couples who are working age

and State Pension age. After the clients had been misadvised by several agencies, an advocacy worker checked with Welfare Benefits Unit and an immediate claim with a backdating request ensured that they did not lose additional elements of Universal Credit.



2000

orders to over 400
organisations and
individuals.

Forum meetings, social policy and collaborative working

Welfare Benefits Unit supports partnership working, putting advisers in touch with each other and relevant organisations.

WBU experience also informs the work we do within regional networks and involvement in national forums, such as the Poverty and Debt Taskforce or responding to national interest in support for Resettled Ukrainians. 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 new North Yorkshire Council's Council Tax Reduction scheme consultation. We were advised that our detailed response would help shape the discretionary hardship fund criteria.

Biannual forum meetings

- \ Specialist briefings: EEA nationals
- \ Budget and benefits updating
- \ Information sharing
- \ 2 meetings
- \ 81 attendees

Trustee Board & Staff 2022/23

Trustee Board

Paul Murphy: Chair
Richard Bridge: Treasurer
Prof Peter Ball
Heather Brock (until July 2022)
Helen Edwards
Prof Charlotte O'Brien
Dr Katie Pybus (from January 2023)
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

Finances

The Welfare Benefits Unit is supported by North Yorkshire Council and City of York Council. Additional revenue raised through training and publication sales, and consultancy services are essential to ensure continued, quality assured 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 Universal Credit briefings. We also received essential funding from JRHT York Committee supporting adviser costs and IT changes.

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



Supporting care arrangements after family bereavement: advice about the evidence needed, tenancy arrangements, claim processes and options for children to claim independently helped grandparents taking on responsibility for the care of their grandchildren at an extremely difficult time. Working with an Income Maximisation officer ensured the family got the support they needed, backed up with expert benefits advice.

Welfare Benefits Unit

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Advice Line

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