

**Surrey Welfare Rights Unit
Impact Report
2023/24**



This year

I am pleased to share another Impact Report for Surrey Welfare Rights Unit. 2023/24 was a year where we saw an increase in the complexity of the enquiries referred to us. For the staff and volunteers that we support across Surrey and the surrounding areas, we know how hard it is to keep up with constant legislative changes. During this year we saw the arrival of Managed Migration to Universal Credit. There was initial confusion regarding how the DWP were interpreting the transitional rules, and what that meant for the advice sector who strive to advise their clients fully and accurately. We anticipate further bumps in the road as Managed Migration picks up pace during 2024/25. Apart from dealing with complex queries, and delivering a significant number of training courses, we also upped our research and campaigning activity. We forged stronger links with the welfare policy team at Citizens Advice, and drafted targeted web information for people with lived experience who are involved in service development, and parents and Carers of children and young adults who are in transition age 14-25.

We responded to the Government's consultation on sickness benefits, and were pleased to see that many of the draconian proposals were dropped. There is still widespread concern that disability benefits will be targeted next. After the General Election we will be keeping a close eye of what social security proposals any new Government makes, and how these could affect local vulnerable people. My thanks go to all the hard-working SWRU staff, and the Board for all their support.

A few words from the Trustee Board

Despite the ongoing cost of living impact on individuals and services, I am pleased to report that Surrey Welfare Rights Unit has had another successful year, owing largely to our dedicated staff and the continued support of our funders. We were delighted that following the ongoing success of our Parent Carer project, Moving into Adulthood, Surrey County Council has continued to fund this much needed service. It is an example of how the voluntary sector can provide preventative services to help alleviate the pressures on the statutory sector.

Our Chief Officer, Maria, working in collaboration with other local Citizens Advice Service was successful in tendering for the SCC led Work Wise project and we look forward to progressing this new advice service with our three local Citizens Advice partners.

Our workforce is a small team of highly specialist welfare advisers, and we were very sorry to have to say farewell to Sarah Fell who has been with SWRU for over 10 years. We wish Sarah a long and happy retirement. We are very pleased that Sarah will continue her association with SWRU by offering voluntary support for our Trustee Board.

My fellow Trustees have worked hard this year to develop our strategy, ensure we meet governance standards and support Maria. They all tell me how much they value the work of SWRU and enjoy working together. They all offer me great support which is key to our success. My thanks go to them and to Maria and, of course, our funders.

Jane Bourgeois Trustee Board Chair

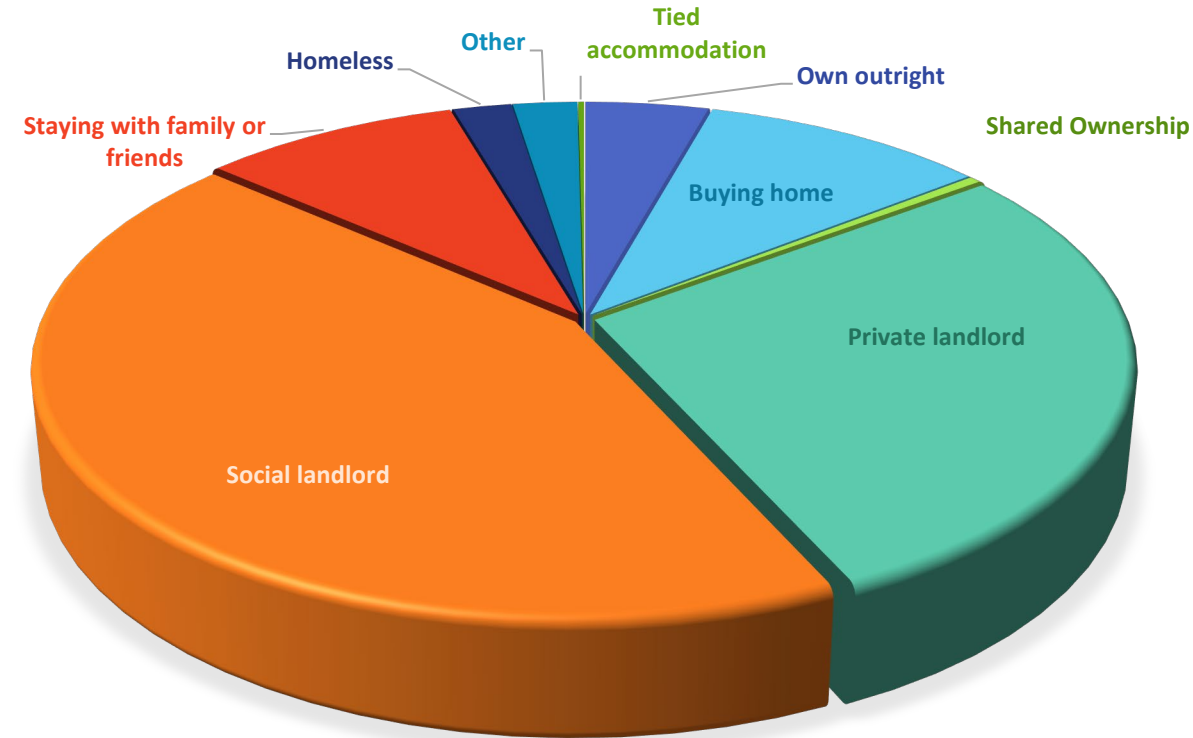
We helped those most in need

Our case recording system, Casebook, captures housing status along with other profiling data. Compared to last year's statistics we saw another annual drop in enquiries from households who were owner occupiers or those with a mortgage. Social housing tenants endured benefit problems far more than any other household type.

48% of our clients declared they had a disability or long-term illness. 14% preferred not to say, and only 20% said they did not have an illness or disability. This is a clear indication of the enormous barriers faced by disabled residents and those coping with ill health when navigating the benefit system, and keeping benefits in payment.

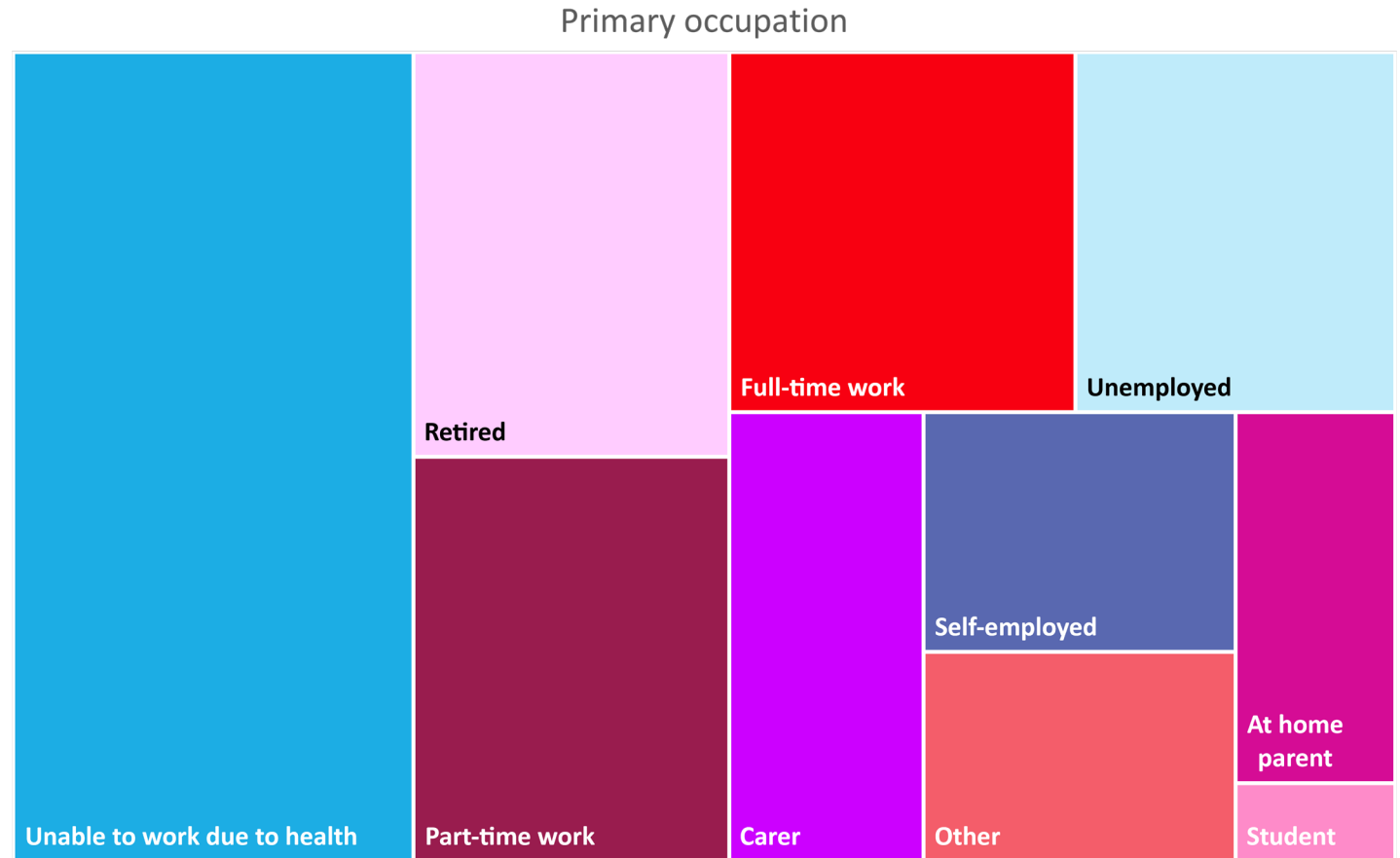
28% of our clients self-declared as non-White British, reflecting the diversity of our local communities.

Over 30 different nationalities were recorded, from Afghanistan to Ukraine.



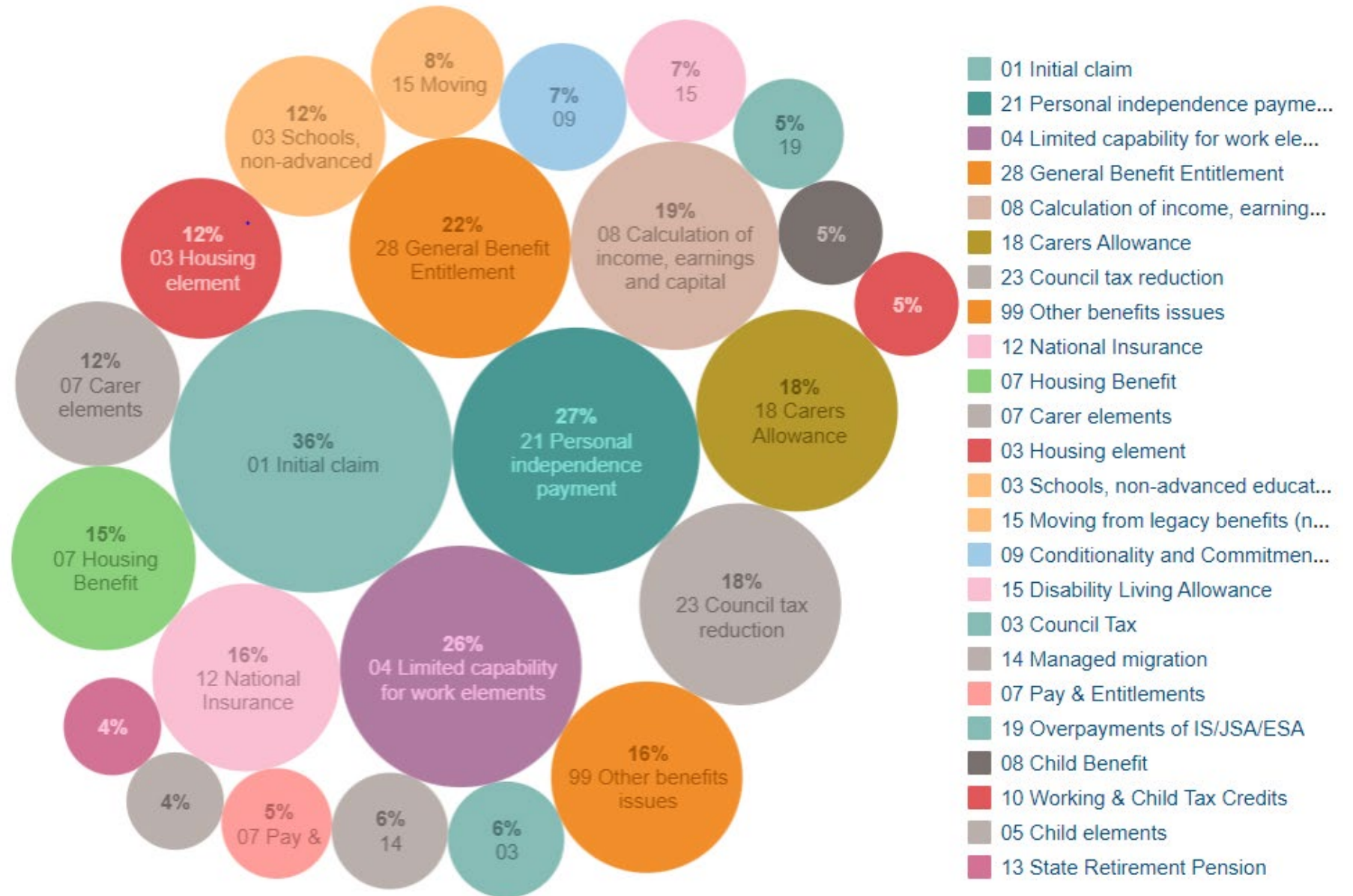
We helped those most in need - continued

You can see from the adjacent chart that those unable to work due to disability or illness were the largest “occupation” group contacting us for help. We saw a slight decrease in Benefit Cap queries, predicted as the Cap rose in value in 2023/24, having been frozen for many years. We saw an increase in enquiries regarding obtaining a national insurance number, how to secure medical evidence for Employment and Support Allowance, and a 43% increase in Personal Independence Payment appeals. Queries relating to Universal Credit and pre/settled-status were up 233%, as well as UC queries regarding appointees, complex needs, and appealing incorrect decisions.

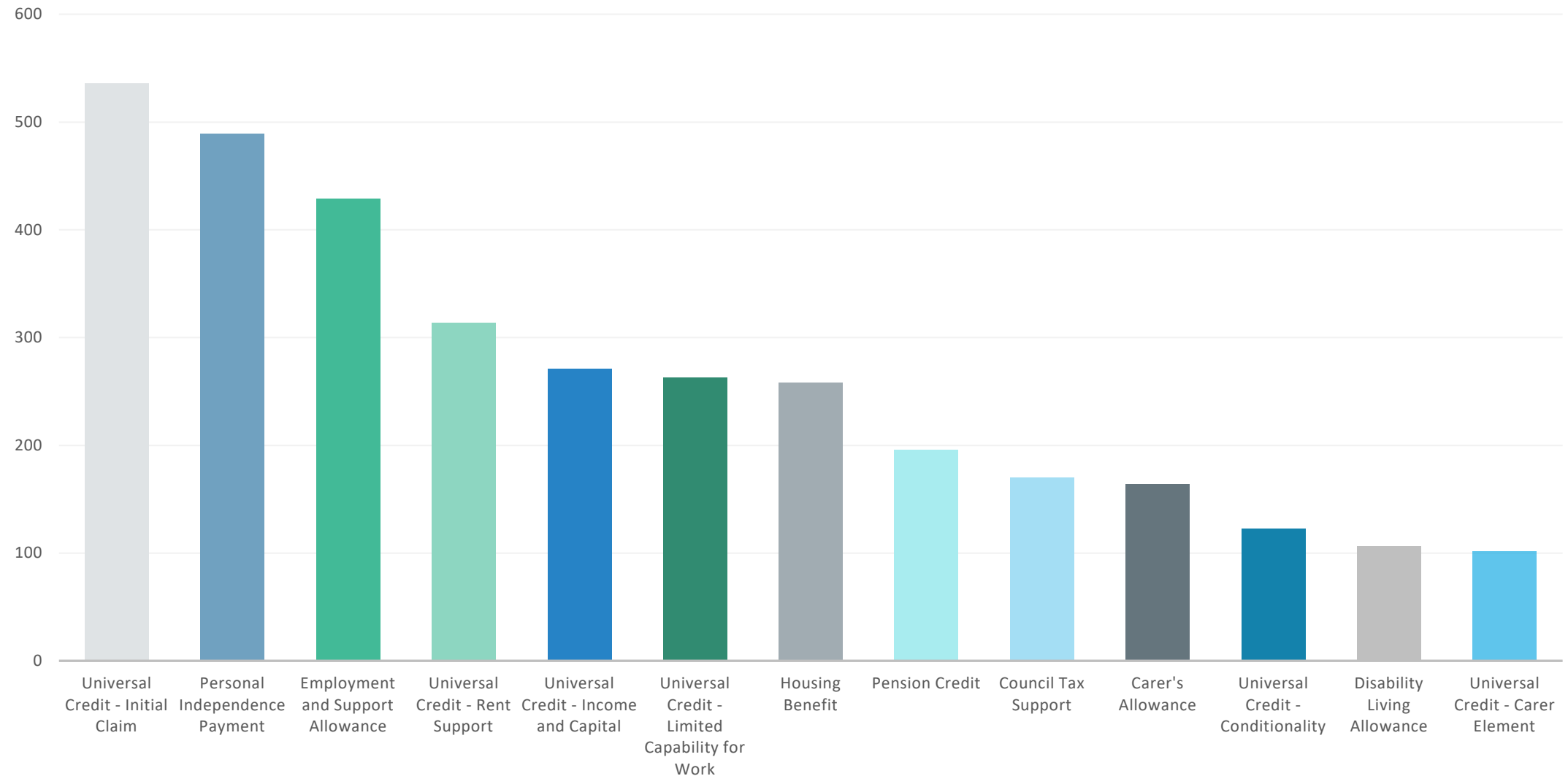


For every client that contacted us about Employment and Support Allowance, these were the other issues we helped the client navigate

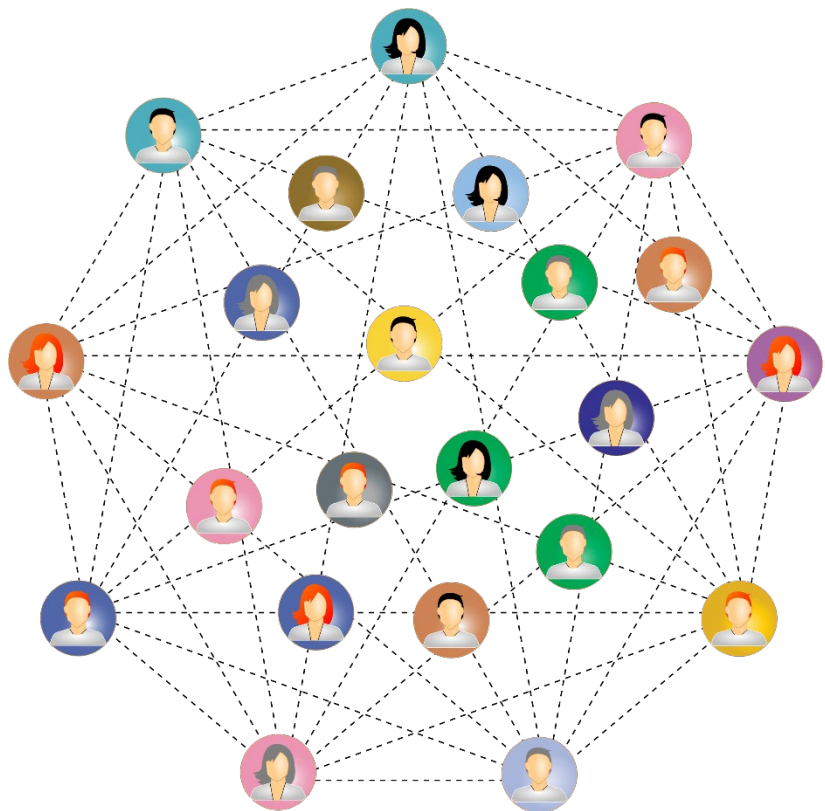
Complexity of enquiries



Key benefit problems



In total our advice had this much value



Financial Outcomes direct and indirect
£2,554,699
£354,305 confirmed client benefit gain

Our Fiscal Benefit was £207,943
Fiscal Benefit: Avoiding cost of evictions and temporary housing, avoiding costs of unemployment, and reducing use of NHS services by resolving problems that cause stress and anxiety and depression.

Our Public Value was £2,338,614
Public Value: Improvements in health, well-being, participation and productivity.

Headline figures:

Reducing use of NHS £53,989

Keeping people in work £74,672

Homelessness prevention savings
£23,449

Fiscal benefit of supporting claimants
with benefit debts £81,478

**For every £1 of funding we
received our clients gained
£8.71 and we created £7.97 of
public value**

How we work out our value

Citizens Advice help us calculate our value using a Treasury approved cost-benefit tool. Four key variables are considered.

- **Affected population:** Number of people receiving advice about a specific issue
- **Impact:** Impact of advice on a specific outcome
- **Deadweight:** What would have happened anyway without our advice
- **Optimism bias:** Accounting for best practice, timeliness and independence of research

In addition to our financial outcomes, we also try to record non-financial outcomes such as blue badges or a social care assessment, as well as “soft” outcomes such as a client reporting improved health, or resolution of a complaint.

The value of e-training is difficult to quantify. However, the more volunteers and staff are supported and have access to training, the more likely it is that they are satisfied at work, and will remain at the organisation. Each adviser that we train and support will, in turn, help hundreds more local residents.

Our research and campaigning work is equally important as helping individuals resolve their benefit problems. The value of this work is when we successfully raise an issue with key parliamentarians or decision-makers, and see changes happen that help those struggling to navigate the social security maze.

Moving into Adulthood project



The project is entering its third year and is still picking up momentum. The web-tool created by SWRU staff for parent carers to access information is now live on the website: <https://www.swru.org/moving-into-adulthood/> It seems appropriate at this time to look back at the genesis of the project to explain how the reach of the project has extended to find and then provide support to this particularly disenfranchised group of benefit claimants.

In 2021 the government made changes to Universal Credit to stop most students from claiming Universal Credit, arguing that they should rely on student finance instead. At the time we were concerned that these changes would have unintended consequences for non-advanced students with health conditions and disabilities. This group had always been able to claim means tested benefits in their own right from the age of 16. At the time of the change we wrote to the Work and Pensions Committee and the Social Security Advisory Committee to highlight the additional impacts of the change in the law that had seemingly not been foreseen nor impact assessed. At that stage no one had yet been disadvantaged, so the response was very much wait and see.

One of the difficulties for the project was to get into contact with the people we wanted to help. Carers are often pulled in many directions at once. While young people are in education a lot of time and energy is spent on getting the help they need at school. Understandably the settings they visit do not have the skills or the resources to help with welfare benefits.

Moving into Adulthood project



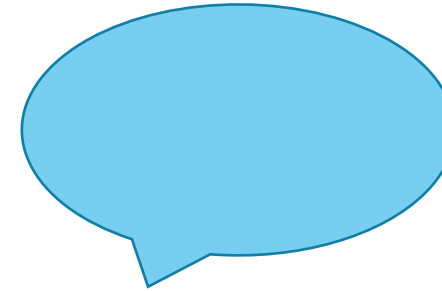
Bespoke advice was provided on an individual basis. As staff in the different settings were exposed to the benefit issues, they became aware of the need for more help in this area.

The evidence we gathered was invaluable in designing the approach for the different strands within the 14-25 year-olds we were targeting. This area of benefit law is hugely complex and it is not possible, or desirable, for Parent Carers to understand the entirety of the issue. Instead we wanted to allow them to access the slice of information that was relevant to their young person.

The MIA project was never conceived as the whole answer. A single part-time staff member could not possibly address the unmet need across Surrey. We are now entering phase 3 in which we have developed a focussed high-level training course to deliver to staff in the various settings that encounter the young people covered by the MIA project. The aim is to encourage staff in the settings to understand in more detail the issues that their young people and their Parent Carers are experiencing. It is hoped that with encouragement, support and training this will result in the individual organisations in closest contact with the Carers providing a permanent link to the benefit advice that is so sorely needed.

The final phase of the project is to return to the social policy side of the issue and once more approach government. We now have evidence of how this has affected vulnerable households. We plan to write once more to appropriate parties to explain who is being affected and what we think the solution or solutions may be.

What they said.....



“I just wanted to say thank you so much for giving such a thought provoking talk at our conference”
Voluntary Action organiser



“Thank you so much for your assistance and time spent on this case, that is very much appreciated.”
Local Citizens Advice caseworker



“I wanted to pass on my gratitude for your advice and support in this matter and also to convey how relieved and grateful my client is now that this situation has been resolved in his favour.”
Local Adviser



“ Thank you so much for delivering the training yesterday – I have had great feedback from the staff who loved it and found it very informative.”
Local Charity



“ The training was a great help and much appreciated”
Tenancy Sustainment Officer



“We much appreciate your time and know the Network members really welcomed your information and support.”
SCC Adult Social Care – Carers’ Network Lead



“ It’s very reassuring to know we have your team of experts on hand when I come across a particularly complicated benefits case.”
Local Citizens Advice volunteer



Training the advice sector

SWRU courses delivered	29
Local advice workers trained	383
Commissioned courses delivered	27
Local staff and volunteers trained	486

New courses included:

Universal Credit – the tricky bits

Pension Credit

Managed Migration to Universal Credit

A significant part of this training activity was funded by Surrey County Council as part of their No-One Left Behind programme, and the National Lottery Awards for All grants scheme.



Working with others for better client outcomes

Local Citizens Advice in Surrey,
Hampshire, Merton and Lambeth,
Berkshire and Sussex

Surrey County Council – Policy and
Commissioning

HMCTS

Jobcentre Plus

Surrey District and Borough councils

Citizens Advice –National Office

No-One Left Behind

Department of Work and Pensions

Surrey Welfare Advice Group

SCC Adult Social Care

Cost of Living Partnership

SCC Information and
Engagement Team

Surrey Warm Hubs network

SCC Carers Network

Surrey Work Wise IPSPC

Who we are

Staff

Maria Zealey – Chief Officer

Brigid Caffyn-Parsons – Welfare Rights Adviser

Karen Creeth – Welfare Rights Adviser

Carol Gibbs – Senior Welfare Rights Adviser

Lou Glencross – Parent and Carer Benefits Adviser

Helen Haws – Welfare Rights Adviser

Ray Savage – Administrator

Fernanda Tuozzo - Work Wise Benefits Adviser

We would like to thank

Surrey County Council

Woking Borough Council

Elmbridge Borough Council

The National Lottery

Our subscribers

Trustees

Jane Bourgeois – Chair

Louise Fisher

Anne Haigh

Roger Hurcombe - Treasurer

Keith O’Neill – Vice-Chair

Jan-Pieter Oosterom

Steve O’Sullivan

Anne Pirie

Suja Subramanian

Surrey Welfare Rights Unit aims to provide the advice people need for the problems they face and improve the policies and practices that affect people's lives.

We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

We are a member of the Citizens Advice service.

**Surrey Welfare Rights Unit
Company Number: 3335128
Charity Number: 1062826
FCA Number: FRN 617760
OISC Registered
AQS Standards in Welfare
Benefits Casework and
Telephone Support**