

A 3D rendering of a grey folder with a white tab. The text "ANNUAL REPORT" is written in large, bold, red letters on the tab, and "2013 - 2014" is written in large, bold, black letters below it.

ANNUAL REPORT
2013 - 2014

Registered Charity No. 1113524
Company No. 5730678

2013 / 2014
HEADLINES FROM THIS YEAR'S ACTIVITIES

- BENEFIT ENQUIRY LINE** - **647 BENEFIT ENQUIRIES**
producing 1,152 separate benefit
issues
- **£72,370 IN MONEY GAINS**
IDENTIFIED
- INFORMATION ITEMS** - **16,836 DISTRIBUTED**
- TRAINING COURSES** - **35 COURSES & PRESENTATIONS**
- **574 PARTICIPANTS**
- **AVERAGE 9/10 RATING BY**
ATTENDEES
- APPEALS CASEWORK** - **252 REFERRALS**
- **479 CASES CLOSED IN YEAR**
- **76% SUCCESS RATE**
- **£1,865,590 IN MONEY GAINS**
- TAKE UP CAMPAIGNS/
SPECIAL PROJECTS** - **1,643 REFERRALS RECEIVED**
- **EVERY £1 OF FUNDING RETURNS**
OVER £17 IN BENEFITS FOR
CLIENTS
- **£2,198,531 IN MONEY GAINS**

Chief Executive's Report

I am extremely pleased to present this report on the work done by WWRAS in the period April 2013 to March 2014 during what has been a period of significant transition for the welfare state. This immense period of change has presented challenges for advisers and clients alike, and our team as always, have had to navigate an extremely complex maze of changing rules and regulations to ensure that vulnerable Warwickshire residents continue to have access to a high quality specialist advice service so that their rights are protected and the harsher effects of welfare reform are mitigated.*

(* See WWRAS briefing "Making Welfare Reform Work in Warwickshire - Jan 2014)

Achieving Excellent Outcomes for Warwickshire residents

WWRAS's mission statement and raison d'être is to increase awareness of Social Security benefits amongst staff working for Warwickshire County Council and related agencies and to raise the level of benefits claimed in Warwickshire. We provide the only specialist service of its kind in Warwickshire and indeed in surrounding areas.

Despite continuing to operate on a depleted core budget, 2013/14 has still been an incredibly successful year for WWRAS in terms of the hugely positive and impressive outcomes we have continued to achieve for Warwickshire residents. All staff and Trustees should be extremely proud of what WWRAS continues to achieve for its clients - this advice and support is truly life changing for many of the clients whom we lend a voice to; the socially and financially excluded and those who are not able to speak up for themselves. In an age when many in society and the media seek to demonise and stigmatise those who have to rely on social security benefits, the stories and messages that are contained within this annual report should serve as a sobering reminder of the hugely positive impact that high quality specialist advice can have on an individual's health, happiness and quality of life.

Promoting Independence - The Benefits of Benefits

The theme of our AGM this year is "The Benefits of Benefits" - and how our work helps to promote independence for people with disabilities. We are used to measuring our success and impact in terms of the amount of social security benefits that we secure for people each year and whilst this still remains an important indicator of our effectiveness as a welfare rights advice agency, increasingly we are looking beyond the headline figures to

analyse and demonstrate how the benefits we secure for people effect positive improvements in people's lives and promote independent living.

Giving individuals the financial means to choose what practical assistance they need can relieve the pressure on Social Care to provide direct help. At worst, it defers the time when social services resources may be required.

Equally, a *brief* and targeted intervention at the start of the process (such as when illness/disability first arises, or on discharge from hospital) can have long term positive results. We have carried out an extensive survey of our appeal and take-up clients, the results of which will be shared during our AGM and which can be made available on request.

Financial Gains and Return on Investment - 2013/14

Alongside the softer outcomes referred to above, we still routinely record the financial impact our work has on local residents and in turn on the local economy. I am extremely proud to report that in 2013/14 through our Tribunal and Benefits Take-up work we have secured financial gains for Warwickshire residents totalling **£4,064,121**. This is just over 7% higher than last year's total. It should be noted that these are vast underestimates of the actual amounts gained.

Our Appeals work raised **£1,865,590** and our take-up work **£2,198,531**. This represents a combined return on investment of just over **£10** for every **£1** of funding that we received; this figure rises to over **£17** for every **£1** of funding for our take-up work alone. This is a truly staggering return and also means that national money is being brought into local economies on a significant scale and research shows this is mostly spent on local goods and services, thus bringing a much needed boost to the local economy; a positive dual effect if you like.

Finances

This year saw our core funding remain at the same level as the previous year and we are grateful for our funders within the People Group Directorate at Warwickshire County Council for its continued support in the context of significant financial pressures. The much welcomed stability in our core funding allowed WWRAS to consolidate and retain its core team. Our overall income level dropped slightly in 2013/14 by just under 2% to **£402,762** but we continued to diversify funding streams particularly for take-up work and this source of funding now accounts for **36%** of our total funding.

We managed to achieve a modest surplus at the end of the financial year and in accordance with our reserves policy this surplus was transferred into our general reserves fund as our contingency reserve for ongoing liabilities to the Local Government Pension scheme and redundancy provision was already adequately covered.

Local Government Pension Fund Deficit

WWRAS, along with many other voluntary sector organisations in the county is a member of the Local Government Pension Scheme. Although a decision was taken several years ago to close the scheme to new WWRAS employees, we still had five members of staff in the scheme as at 31/3/2014. We were informed by the WCC Pension Fund in January 2014 that following the latest pension fund valuation there was a significant deficit in terms of our past service contributions and also in terms of our ongoing employer contributions. WWRAS was also informed at the time that although it had always been part of a wider pension's pool, together with other employers and departments of the County Council which had protected us to an extent, this pool had now been dissolved and we would in the future be treated as an individual employer.

The impact of this latest valuation means that WWRAS will have to pay a significant lump sum each year for the next eight years plus incur a hefty increase in our employer's pension contributions. The County Council has funded the lump sum payment for the first year for a group of voluntary sector organisations as a one off piece of assistance, but we have been told that there will be no further financial assistance forthcoming.

We sought advice from our accountants Burgis and Bullock who have advised that we will need to make provision from our reserves and ongoing budgets for these extra payments, but that for the year in question 2013/14 there would not need to be any extra provision made as the new pension arrangements only take effect from 1/4/2014.

Discussions are ongoing with the Pension Fund and the County Council as to whether a more robust, long term solution can be found to ease these additional and significant financial pressures. Many other voluntary sector organisations in the county have been similarly affected and although a group of us sought legal advice, it would appear that there is very little that we can do to change the situation other than to continue this discourse with the County Council to see if a mutually acceptable resolution can be found.

A full copy of our 2013/14 accounts is available on request, which provides more details about the pension deficit and our finances for the year.

As mentioned above our core funding in 2013/14 was not further reduced which gave us some welcome breathing space and an ability to consolidate what we started in the previous year, and I am relieved to report that our

core funding for 2014-2016 will also remain at a standstill of £255,000 p.a; in the interim period a funding review will commence, with any new contracts being effective from April 2016. I would like to thank our funders, for their continued support, open communication and financial investment which enables us to continue delivering the high quality service that WWRAS has become renowned for over its 28 year history.

Referrals for Tribunal Representation - a national issue.

The listing of cases by the Tribunals Service is still beset by delays, but a more significant issue is that cases are not even reaching Tribunal stage for a number of reasons. There have been significant delays to medical assessments for Employment and Support Allowance (ESA) caused by a backlog with the Government's private contractor ATOS and huge delays with making decisions on the new Personal Independence Payments (PIP) which has meant that we have not seen as many cases come through to appeal stage as all anticipated. In addition the introduction of a new layer to the appeals system in the form of mandatory reconsiderations has meant that it now takes much longer for a case to get to an appeal tribunal than it used to.

This is a national problem and one that the Government has yet to properly address, although the transfer of the ESA assessment contract from ATOS to an American company Maximus in 2015; is anticipated to significantly reduce the backlog of ESA medicals and thus we can expect to see ESA appeal cases start to rise in mid 2015. PIP cases, whilst still subject to delay are moving through the system more quickly, and the migration of cases from DLA to PIP in this region has also accelerated, meaning that we are starting to see more instances of the harsher PIP regime in action, particularly for current DLA Higher rate mobility recipients for whom the equivalent test under PIP is far more difficult to satisfy.

Our new referral policy which was introduced in order to target our limited resources at those clients who need our help the most has been reviewed and slightly amended in order to keep pace with the appeals environment outlined above. We do expect there to continue to be a significant increase in appeal referrals due to the magnitude of forthcoming and presently occurring welfare reform, once cases move through the system, so it was absolutely essential that we took this step in the context of fewer numbers of staff to deal with a significant volume of referrals.

Appeals Success

Our Appeals Team raised over **£1.8 million** in increased benefits for our clients. Although levels of financial gains continue to fall as the Government's welfare reform programme effectively reduces some individual benefit amounts and the length of time for which people can

remain on those benefits, our success rate at appeals remains impressively high with success at **76%** of all cases where we represent at tribunal. This compares very favourably to a national average success rate of 47% without representation and 63% when accompanied by a representative.

WWRAS Take-Up Work Goes from Strength to Strength

Our benefits Take-up work continues to return excellent outcomes for our clients when it is becoming increasingly difficult to secure funding for this type of work due to shrinking budgets. WWRAS secured just under **£2.2 million** in increased benefits for Warwickshire residents through various Take-up campaigns in 2013/14 which is an increase of over **15%** when compared to gains for the previous year.

Continuation of Existing Projects

We secured continuation funding for two Take-up posts through a variety of successful funding bids to Warwickshire County Council for our Children's Centre work from the Department of Health to continue our fuel poverty take-up work. Further details of our take-up work can be seen at pages 13-20 of this report.

Looking to the Future

We would like to thank all of our funders for their continuing support, financial and otherwise in enabling us to continue to provide these essential services; in particular we would like to thank Warwickshire County Council, our largest funder which has supported and funded us for the past 28 years.

In a tough financial environment where traditional sources of funding are diminishing and with an expected surge in demand for our services due to the impacts of welfare reform, which we are yet to see the full effect of, it is important for staff and the Trustee Board to embrace new areas of funding and possibly different geographical areas in order to survive.

Our current legal governing document restricts WWRAS activities to Warwickshire alone. Our Trustee Board are now actively considering a change to this document, which would mean legally amending our articles of association which requires prior approval from the Charity Commission. If this change is effected, however, it would potentially mean that WWRAS would be able to compete for funding over a wider geographical area and should lead to increased financial stability in the future.

We welcome Janice Nichols to the Trustee Board who joined us in July 2013 and who brings with her a wealth of experience from her work in senior management roles in the public and voluntary sector. We still look

to further strengthen the Trustee Board, particularly in the key roles of Chair and Treasurer, in order to provide the organisation with the level of strategic experience and expertise that is necessary to prepare us for these future challenges.

I would also like to say on behalf of staff and Trustees, a fond farewell to Mary Williams, a long serving WWRAS employee who retired to France in July this year. A huge thank you should go to Mary for what she brought to WWRAS-her wide and detailed knowledge of the social security system and her confident and articulate advocacy skills which she utilised to great effect on behalf of her clients throughout the years she worked at WWRAS.

A huge thank you also goes to all Board members and staff, who never cease to impress with their commitment, dedication, expertise and professionalism in ensuring that the organisation continues to reach out and deliver a range of specialist services that respond to the needs of the most disadvantaged and vulnerable in our society.

Mark Stanyer
Chief Executive
January 2015

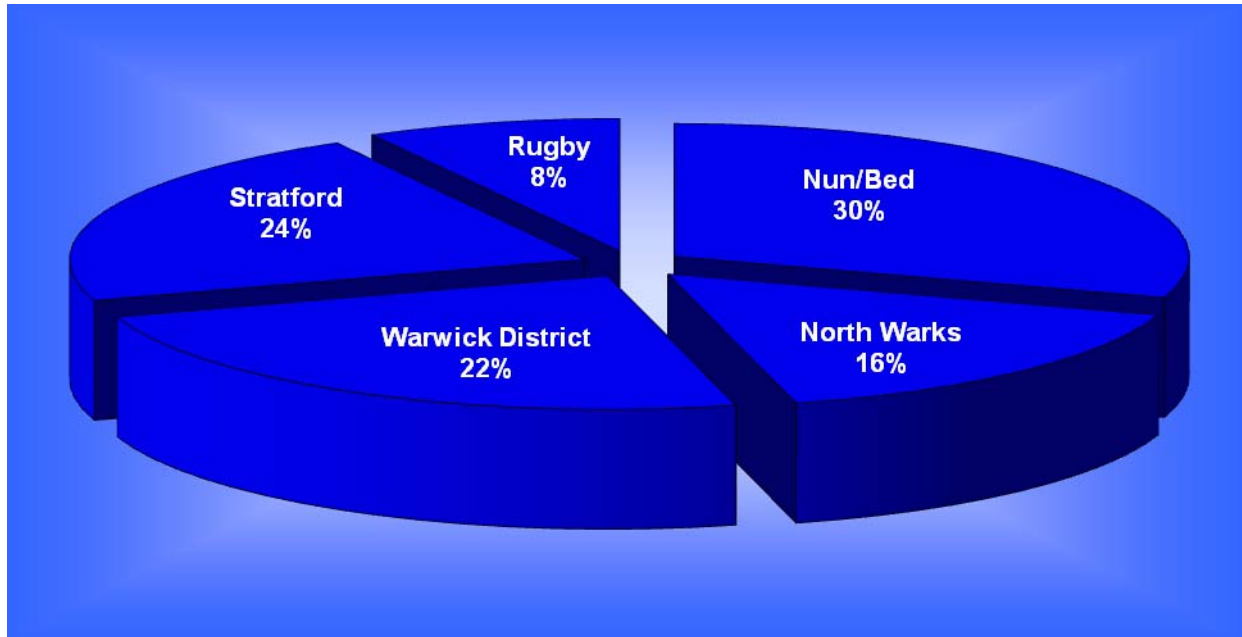
APPEALS WORK 2013/14

252 referrals

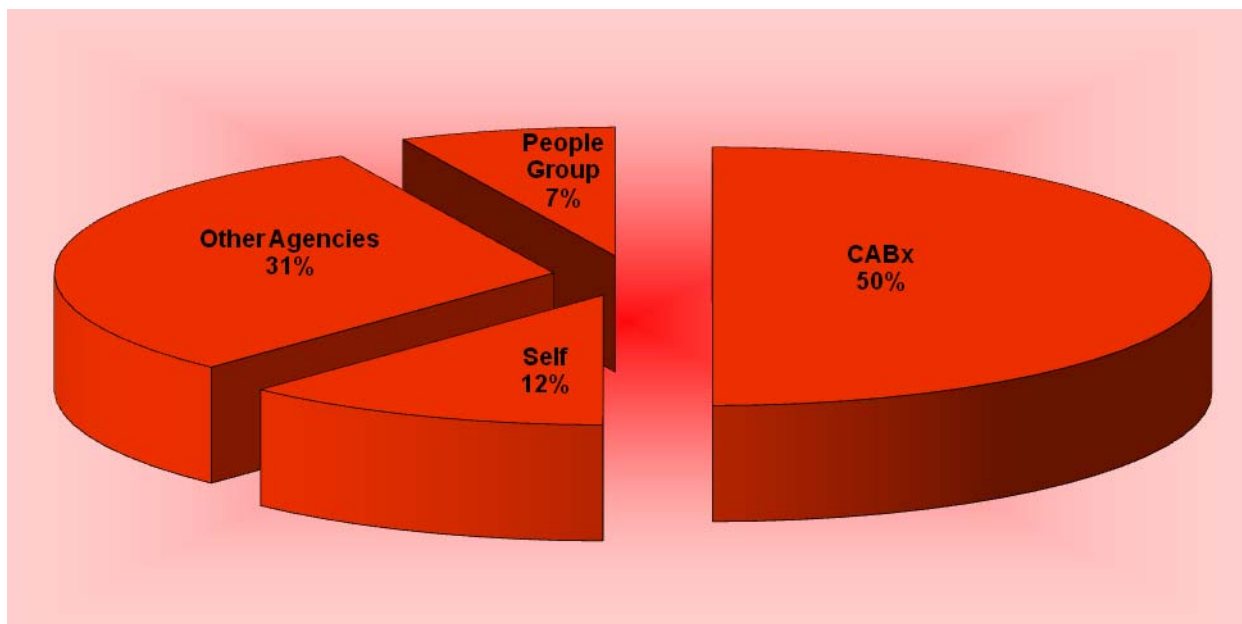
Over £ 1.8 million in benefits raised for clients

Over 76% success rate at appeal hearings

The spread of referrals coming from each area was



The spread of referrals coming from agencies was:



Case Study 1 – Rachel Wilcox (Appeals Worker)

1. Mr P, a British citizen, had to give up his career when a stroke left him with a severe mental disability.
2. He successfully claimed Incapacity Benefit and Disability Living Allowance. (DLA)
3. He was married to a French national and after a couple of years they went to live in France. Mr P remained entitled to his Incapacity Benefit and DLA as the UK was still his 'competent state' i.e. responsible for him. Generally speaking this responsibility stops if the claimant starts work in another EU country.
4. After a few months, Mr P did start to do a few hours work a week, under close supervision in a job that was created for him. He informed the DWP about this work.
5. The Incapacity Benefit office decided that the minimal nature of the work meant it could be discounted, so Mr P continued to be entitled to Incapacity Benefit.
6. The DLA office did not respond for some months and then made a decision that from the date his work started, the UK was no longer Mr P's 'competent state' so he was not entitled to DLA and must repay over £800 in benefits he had already received.
7. By this time Mr P and his wife had returned to the UK. We helped Mr P to appeal against the DLA overpayment decision. The appeal Tribunal accepted our argument that the UK had remained Mr P's competent state after he started work, so he had remained entitled to DLA and there was therefore no overpayment.
8. On a separate issue, when he returned to the UK, Mr P's long-term Incapacity Benefit had been replaced by ESA which is only paid for one year unless the claimant is in the ESA 'support group': Mr P had not been put in the support group.
9. We helped Mr P with an appeal against the decision not to put him in the support group. That appeal was also successful, which meant that Mr P's ESA could continue beyond the first year.

Case Study 2 – Rachel Wilcox (Appeals Worker)

1. Mr T is a pensioner. In 2006 he was awarded Pension Credit, then a couple of months later he was awarded an occupational pension, which he told the Pensions Service about.
2. Nothing happened until 2009 when Mr T completed a routine Pensions Service review form and included details of his pension. On receipt of the form the Pensions Service said they had not previously known about the pension and that Mr T had been overpaid more than £11,000 of Pension Credit which he must repay.
3. Legally, the overpayment would only be recoverable if Mr T had caused the overpayment by misrepresenting his situation or failing to disclose the pension back in 2006. Mr T was insistent that he had declared the pension in 2006 so he disputed the decision, but the Pensions Service started to make deductions from his State Retirement Pension to recover the overpayment.
4. Over the next 4 years the Pensions Service kept Mr T's dispute open, revising their overpayment decision several times; on one occasion telling Mr T that the overpayment decision had been completely overturned, only to make a fresh decision that there *had* been an overpayment. By the time Mr T was referred to us in 2014, he was understandably very distressed.
5. We helped Mr T with his appeal, arguing that the overpayment decision was invalid because there were too many errors in it and the correct legal procedures had not been followed and that, in any event, the overpayment was not recoverable from Mr T as he had declared the occupational pension to the Pensions Service in 2006.
6. At the appeal hearing, the Tribunal Judge agreed that the overpayment decision was invalid due to the number of errors and inconsistencies it contained. This decision in itself would not have prevented the Pensions Service from subsequently re-making the overpayment decision afresh, so we asked the Judge to make a decision on the recoverability issue also.
7. The Judge did so and decided that even if the decision had been correctly made, the overpayment would not be recoverable from Mr T as, on his evidence, which was entirely credible, he *had* told the Pensions Service about the pension when he first received it and there was therefore no 'failure to disclose'. This meant that Mr T did not have to repay £11,000 and the Pensions Service had to refund the £1,500 they had already taken from him.

"We cannot thank you highly enough. Without your support we would not have a) understood that we had a case for appeal b) understood the complex nature of presenting a case and c) the time to do this. Thank you."

"I would recommend you to everyone I know if they needed the service and advice was first rate because I honestly thought I didn't stand a chance at the tribunal but your advice was excellent. "

"Excellent service, very knowledgeable representative. Well organised and well prepared."

"It was good to know I had my representative to accompany me to the hearing. It is all a bit daunting but she helped settle my nerves. I would like to say once again a big thank you to her"

"I would like to thank all of the staff for all their help. When I felt there was no point they helped me to be positive and fight for what was rightfully mine. Thank you all so much."

BENEFITS TAKE-UP WORK & SPECIAL PROJECTS 2013/14

1,643 referrals received

Just under £ 2.2 million in benefits raised for clients

Every £1 of take-up funding raises just over £17 in additional benefits

Take-up & Special Project Gains 2013/14

We have continued to bring in additional funds from other sources to promote the take up of benefits amongst clients who do not traditionally access advice services. This work continues to return excellent outcomes for our clients when it is becoming increasingly difficult to secure funding for this type of work due to shrinking budgets.

This year we have raised **£128,381** in extra funding for take-up work and we secured just under **£2.2 million** in increased benefits for Warwickshire residents through various take-up campaigns which is an increase of over **16%** when compared to gains for the previous year.

This achievement on behalf of Warwickshire residents is certainly noteworthy as this sum represents a significant effort on behalf of our Take-up Team who continue to achieve increasingly impressive results in each successive year. The amount of money raised for Warwickshire residents through our take-up work continues to represent huge returns on investment for funders with an average of just under **£17** being returned in increased benefits for every **£1** of funding received. This extra work complements our WCC core funded services and helps to promote benefit entitlement more widely across the county.

Free School Meals Take-up work

Our Free School Meals (FSM) Take-up work continues to provide significant benefits for schools in the county and this project deserves special mention due to the significant amounts of funding that it is attracting and the results that we are achieving. For every child who is eligible for Free School Meals the school receives a Pupil Premium, which this year amounted to £900 per child (rising to £1,300 next year). Last year through our work with schools WWRAS helped secure **£63,000** in Pupil Premiums, money that schools will be able to use to raise levels of educational attainment particularly amongst more disadvantaged pupils.

We worked closely with schools in North Warwickshire, Rugby and two schools in Nuneaton and Bedworth: Ash Green and Nicholas Chamberlaine. The funding for the project came from a variety of sources including Warwickshire County Council, Rugby Borough Council via Councillors' grants; North Warwickshire Borough Council and for the first time funding was received direct from schools. Nicholas Chamberlaine and Ash Green schools invested £3,500 each to participate in the Free School

Meals project, which was match funded by the County Council. This was an important step in terms of our future business model as eventually we hope to secure the majority of funding for such projects from schools on the basis that the returns each school will receive from increased Pupil Premiums will more than justify the funding expended.

As well as the huge gains for schools via the Pupil Premium, our workers undertake a benefit health check for parents and as a result we were also able to secure additional entitlement to benefits in excess of **£920,000** across the different schools that we worked with. This figure includes a significant amount of results from the Nuneaton and Bedworth FSM Project, which actually began towards the end of 2012/13, but the majority of work and outcomes for clients were actually achieved in 2013/14.

The gains figure is still rising as we receive notification of more positive outcomes on benefit claims from parents and the additional amounts will be reported in our 2014/15 report. With this particular client group it is not just the benefit gains that we produce which is important; it is the advice and guidance provided on what are often extremely complicated situations of individual families. On the back of these successful projects we were able to submit a successful funding application to the Warwickshire Local Welfare Fund; with local schools also providing a third of the overall funding for this work. This has enabled us to provide a Free School Meal and Benefits Take-up project across the entire county in 2014/15.

Other Take-up and Special Project Work carried out in 2013/14

We continued to work with **ten Children's Centres in Nuneaton and Bedworth and Boughton Leigh Children's Centre in Rugby**. This project has been running for the past five years, and the aim is to deliver benefits take-up work to low income families, working with Children's Centres within the area.

The project funding was due to end on 31/3/2013; however we secured additional funding through Warwickshire County Council in order to enable this work to continue for another year. With the operation of the Children's Centre Service now transferred to new providers from September 2014, we have very recently submitted a successful bid to the Warwickshire Local Welfare Fund to enable the service to continue for at least a twelve month period from April 2015. This funding will mean that the service will now be extended to various centres across the county in areas of high deprivation.

In 2013/14 we advised **228** new clients and raised **£650,075** in additional benefits for clients through this project. In addition we provided talks to Children's Centre Teams, especially focussing on the welfare reform changes affecting their clients and WWRAS also contributed to OFSTED inspections as key partners to the Children's Centres.

WWRAS is also funded by **Warwick District Council** to provide a benefits take-up service as part of a wider package of financial inclusion advice delivered in conjunction with our partners, Warwick District CAB and Coventry and Warwickshire Co-operative Development Agency. This funding has enabled us to deliver a targeted take-up service on 2.5 days per week across Warwick District, but mainly focussing on the priority wards of Crown, Warwick West and Brunswick. The funding is due to come to an end on 31/3/2015.

582 new clients were referred to the service this year and we closed 199 of those cases with 445 cases being carried forward into 2014/15. These numbers are unprecedented for this project and were mainly due to a hugely successful Pension Credit Take-up campaign which we ran in conjunction with Warwick District Council Revenue and Benefits Team towards the end of 2013. We received over 400 referrals alone from this piece of work and we expect to secure significant outcomes for clients.

We work with a variety of partner agencies in the District including Guidepost, Age UK; local schools, the Council's Revenue and Benefits Team and local community centres that provide us with referrals. The money gains secured for clients in 2013/14 amounted to **£363,690**. This is mainly for disability and ill health benefits and represents a massive **56%** increase on last year's gains for this project.

WWRAS has had a long standing relationship with **Stratford District Council** and has been funded to carry out numerous one off pieces of take-up work on its behalf. Last year the Council commissioned WWRAS to undertake some income maximisation work with residents who had been impacted by the "spare room subsidy" more commonly known as the bedroom tax. We received funding of £8,000 to deliver this work.

The Council used its own data to identify **838** tenants whom had been adversely affected by the bedroom tax and **8** residents who were adversely affected by the benefit cap. WWRAS prepared a letter, which the Council sent out to all **846** residents inviting them to contact WWRAS for a benefits check via a FREEPOST envelope which we provide.

We received responses from **191** residents whom we then made contact with and we secured **£60,241** in additional benefits within the 2013/14 financial year. We carried forward 61 cases into 2014/15 and we are still securing benefit gains for these clients, so this figure will rise significantly. There are long delays with the DWP decision making process as outlined earlier in this report and this has meant that cases have had to remain open for much longer than usual.

In 2013/14 WWRAS received £15,000 funding from the Warwickshire Health in Warmth Partnership to deliver income maximisation advice to

households that had been identified as experiencing fuel poverty. Total benefit gains for the project were an impressive **£104,830**.

We worked with each of the District and Borough Councils across the county and sent a series of targeted mail shots to clients inviting them to contact us for a benefits check. We started our final piece of work on this project with Stratford District Council and Warwick District Council in March 2014 and we will complete this work in 2014/15, so the financial gains figure above is expected to rise even further.

As well as maximising clients' incomes, the aim of the project was also to refer these clients on to appropriate services e.g. energy efficiency grants, debt advice etc.

Benefits Take-up for the Father Hudson's Society

We were commissioned by the Father Hudson's Society to advise, and facilitate the smooth transition of a number of long-term residents of their Residential Care Home into three independent living units. All had learning disabilities, some quite severe.

We assessed the benefits eligibility for each resident, and maximised entitlement bearing in mind the often complicated interaction of benefits between individuals.

A number of new claims were made, and we oversaw the individual journeys to full entitlement, which turned out to be quite time consuming. Finally we negotiated with the local Council to maximise rent rebates and minimise Council Tax liability, which also involved an element of 'future proofing' against welfare reform.

This work saw us secure benefit gains for residents of **£98,904**.

Big Lottery Project-North Warwickshire and Stratford District CABx

We received funding from the Big Lottery via a partnership bid with North Warwickshire and Stratford District CABx which has enabled us to start a two year project providing consultancy, support and training to the two Bureaux in the area of welfare benefits in order to improve the quality of advice that each CAB delivers.

For the first time WWRAS has used the services of a freelance welfare rights adviser/trainer to deliver this work for us. We have also utilised the freelance adviser to deliver services under some of the shorter term pieces of funding that we secured throughout the year. This has enabled us to bid for additional pieces of funding where we would not have been able to do so in the past. It has also enabled us to increase our capacity and deliver services which previously were very difficult to recruit to, due to the very short term nature of the work that this type of funding normally brings.

The bulk of this work was carried out in 2014/15 and so will be reported on in our 2014/15 annual report.

Campaign	Amount raised 2013/14	Funding secured 2013/14	Funder
Children's Centres	£650,075	£44,430	WCC
Warwick District Council Take-Up	£363,690	£19,751	WDC
Health in Warmth	£104,830	£15,000	Health in Warmth Partnership
Stratford DC Take Up	£60,241	£8,000	SDC
County Free School Meals Take-Up	£822,680	£34,100	WCC; Ash Green & Nicholas Chamberlaine schools
NWBC Free School Meals Take Up	£98,111	£7,100	NWBC
Father Hudson Transition Work	£98,904	£914	Father Hudson's Society
<i>Total</i>	£2,198,531	£128,381	

Case Study 3 — Bal Sandhu (Take-Up Worker)

1. We received a referral from a local agency requesting a benefit check for a client. We contacted the client upon receiving the referral and arranged a home visit.
2. Client, Mrs R, was a single retired pensioner aged 68 living in rented housing association accommodation.
3. Client was in receipt of State Retirement Pension of £136 pw; Private Pension £63 pw; Housing Benefit and Council Tax Benefit.
4. Mrs R's health had been deteriorating for a number of years, arthritis being her main disabling illness. Mrs R stated that she was struggling to pay for care bills, utility bills and to live independently because of increasing costs associated with her condition. These costs included employing a carer, heating costs, much needed adapted furniture, and disability friendly appliances.
5. We assessed Mrs R to ascertain if she would be eligible for Attendance Allowance (AA). It was evident that Mrs R met the criteria and so we proceeded to complete a new Attendance Allowance claim with the client.
6. Mrs R was subsequently awarded the higher rate of Attendance Allowance. The award of the Attendance Allowance now entitled Mrs R to Pension Credit Guarantee Credit of £10.45 pw. With the award of Pension Credit Guarantee Credit in place Mrs R was passported onto full Housing Benefit and Council Tax Support.
7. Mrs R was better off by £91.75 per week and by having to pay out less in rent and Council Tax.
8. Mrs R completed a Client Feedback Questionnaire stating:- *"I'm now able to buy a wider & healthier variety of food. Able to have heating on a bit more often. Will be buying a cooker, not had one for 12 months and a much needed bed. I had nothing to do but answer a few questions, the gentleman filled in the forms on my behalf, he was polite and informative."*

Case Study 4 - Bal Sandhu (Take-Up Worker)

1. We received a completed return slip from one of our Free School Meal projects. Although the client would not have qualified for Free School Meals due to her Working Tax credit award, a significant part of our role on this project is to ensure that a family's income is maximised. We therefore contacted the client upon receiving the reply slip and arranged a home visit.
2. Client was a single parent with 2 children aged 13 and 10. Client worked part time earning just under a £100 a week. Client was also in receipt of Working Tax Credit £58.63 pw, Child Tax Credit of £113.46 pw and Child Benefit of £33.70 pw. Client was paying a mortgage and also paying full Council Tax.
3. Client's eldest child suffered with post traumatic stress disorder following a serious incident and required a great deal of support. Client was unable to spend more time with her child to support her because of work commitments as she needed the income to support her and the two children.
4. We carried out a benefit check and assessed whether the client's daughter would be eligible for Disability Living Allowance (DLA). It was evident that her daughter required support throughout the day and night due to the nature of her illness. We proceeded to complete a new DLA claim.
5. Her daughter was subsequently awarded the highest rate of care and lower rate mobility components of Disability Living Allowance. The award of the DLA now entitled the client to be able to claim Carers Allowance. The client was able to reduce her hours at work in order to spend the much needed time with her daughter and still be able to retain her work and keep her own independence. Her Child Tax Credit award increased because of the award of DLA.
6. The client was better off by £247.95 per week following our advice and support. The client completed a Client Feedback Questionnaire stating:-

“ this has taken pressure off me -, needed to be there for my child who is mentally ill but also needed to work to survive. I can now afford the basics. The help I received was so valuable and I am very grateful. It has changed our lives.”

“Your advice made a big difference as I found out from you I could have claimed eleven years ago and didn’t know!”

“Your advice has helped with the shortfall of rent due to under occupancy. I have two bedrooms.”

“Getting the right benefits has meant I am able to look ahead to the future”

“Being able to treat my son to days out without worrying has taken so much financial pressure away”

“It helps us with the boys to take them out, holidays and with after school activities”

“I am now able to afford sensory lighting and sensory toys to help calm my autistic son”

“I was helped to apply for a discount from EON and welfare rights talked me through the process”

“Advice and help was invaluable - don’t know what I would do without the help, guidance and advice that you have given”

“I’m very happy this service helped me. Without it I would not have known about the other benefits. Also it’s been a stressful time for me and my family, so it’s really nice to have someone else helping us. I am very grateful for the help and advice given to us.”

TRAINING & INFORMATION 2013/14

35 courses & presentations

574 participants

Courses average rating of 9/10 by attendees

16,836 leaflets distributed

Our training function is split into two broad areas: a fixed annual Training Programme and a series of training sessions arranged on request during the year, which we refer to as Non-Training Programme courses, or NTP.

One of our strengths is that our trainers are also practitioners – they also staff our Benefit Enquiry Line, do appeals and casework, and often write information materials. In this way their training presentations are informed by practical knowledge of the subject matter.

We have again had to schedule a reduced number of courses this year due to continued reduced core funding levels. We scheduled eighteen courses (compared to the 25 we would normally run), with one course being cancelled due to low numbers. Of the **seventeen** courses that we ran, **four** were new and **two** courses had been significantly updated. New courses included the “**Benefit Changes Seminar**”, which was run twice; “**Universal Credit**” (this was also run twice due to popular demand) and the “**New Appeals Process**”. The courses that we significantly updated were: “**Pension Credit**” and “**DLA for Children**”.

Course bookings can be done directly from our website and we use this and e-mail to reduce the administration and cost involved in processing bookings.

The current and forthcoming welfare reforms will only increase the need for training and we will of course be looking at how we can manage to still retain sufficient parts of this valued service to cope with the increased demand for training on new areas of Social Security law.

High Satisfaction Ratings

We encourage feedback from those who attend and commission our training, and use it to both improve our current courses, and develop new issues to cover.

There are immediate ‘on the day’ evaluations, plus post training surveys carried out later to assess the effectiveness of the training once back at the workplace.

From the fixed Training Programme evaluations **100%** of attendees said that they found the course they attended helpful in increasing their knowledge, relevant to their work and pitched at the right level for them. When considering the quality of presentation attendees scored it on average as worthy of a mark of **9 of out of 10** and an average rating of **9 out of 10** for the usefulness of the training materials and visual aids.

When given the opportunity to add comments, **89%** of the comments were positive. The standard of administration and the venue also scored highly, with **99%** for the joining arrangements, and **97%** for the venue.

SOME QUOTES FROM RECENT TRAINING COURSE EVALUATIONS:

- *"Excellent courses-dealing with very complicated system-but making it understandable. The advice line is invaluable"*
- *"The training was very relevant to my job role as a care worker. Since the training I have been able to share information I have learnt with carers. I feel a lot more confident advising carers now after the training.."*
- *"Really helpful and also provided with additional information after the training as a result of questions which arose during the session"*
- *"I always find the WWRAS training very informative and well presented. The booklet handouts are very useful in being able to recap information when talking to clients and colleagues."*
- *"Fantastic courses and invaluable services that you offer to our parents"*
- *"Training has always been delivered professionally and at right level of information for such a complex subject"*

Four issues of the Benefits Bulletin were produced this year and distributed to raise awareness of topical benefit issues. This still remains a very popular and effective method of disseminating important information across the county on welfare benefits and conveying key messages about current or forthcoming changes which can affect different client groups in very different ways.

Number of publications updated

All of our current publications were checked for accuracy and up-to-date content and there is a rolling programme of updating these throughout the year. However from April 2012 we had to archive a large proportion of our leaflets and information packs and these will no longer be updated. This was due to funding cuts resulting in the loss of our dedicated Training & Information Officer. We do not have the available resources to keep the vast array of information resources up-to-date without additional resources and it would be dangerous to continue to publish out of date materials. We have continued, however, to make available a selection of the most frequently used publications which we have continued to update.

Numbers Distributed/Website

We have distributed **16,836** one-off leaflets/publications in this year; our Benefits Bulletin newsletter and our “Benefit Rates leaflet and checklist were the most popular information items.

Brand New Re-designed Website Launched

With funding from Big Lottery via the LAW Partnership we commissioned Overbite to completely re-design our website which went live in January 2014. The website is now easier to navigate; is more visually stimulating and provides lots more useful information in order to assist Warwickshire agencies to be able to help their clients resolve their benefit issues.

We are still working with the site developers to retrieve usage statistics from the new website as it is hoped that we will be able to get a lot more detailed statistics which will assist us in developing future services and improvements to the information displayed on the site.

218 users were registered for the restricted “adviser” section of the site as at 31/3/2014.

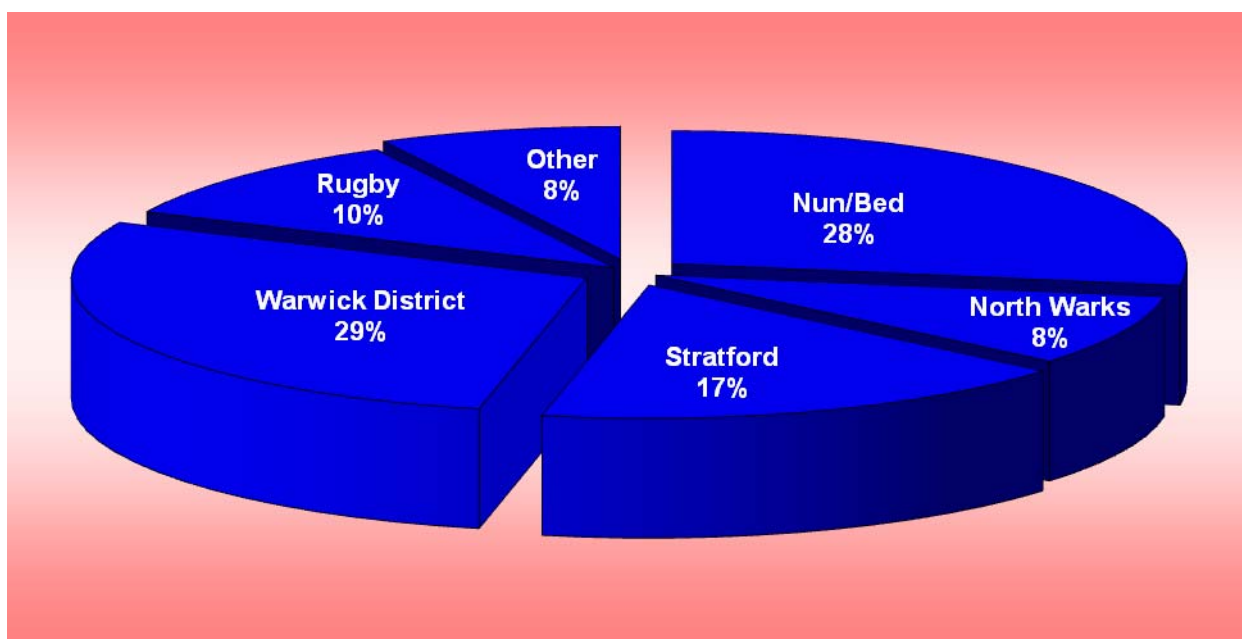
BENEFIT ENQUIRY LINE (B.E.L.) 2013/14

*647 enquiries received
Advice given on 1,152 unique benefit issues
£72,370 in money gains identified*

This is our telephone help line for WCC staff and staff in other statutory and voluntary agencies across the county. This is a specialist telephone consultancy service for front-line professionals and advisers and provides an invaluable resource for those workers to support their clients through the complex maze that is the social security system.

There is no other resource of its type in the county and anecdotally callers tell us that they feel reassured that the person at the other end of the phone is an experienced caseworker and can talk them through a complex benefits scenario step by step. If further specialist support is needed after this initial advice then a referral can be made to WWRAS.

There are a varied range of calls from the different parts of the county. Warwick District agencies, as ever, made extensive use of the service with over **30%** of all calls coming from this district alone. This year calls from Nuneaton and Bedworth agencies increased so that their usage of the service was nearly on a par with Warwick District with **29%** of all enquiries coming from this area. Stratford agencies accounted for **18%** of all calls, which is slightly down compared with the previous year. Rugby agencies represented **11%** of all enquiries, again slightly less than last year and enquiries from North Warwickshire remained constant making the least enquiries at just fewer than **9%**. The remainder of calls were either out of the area or from county organisations not restricted to any one geographical area.



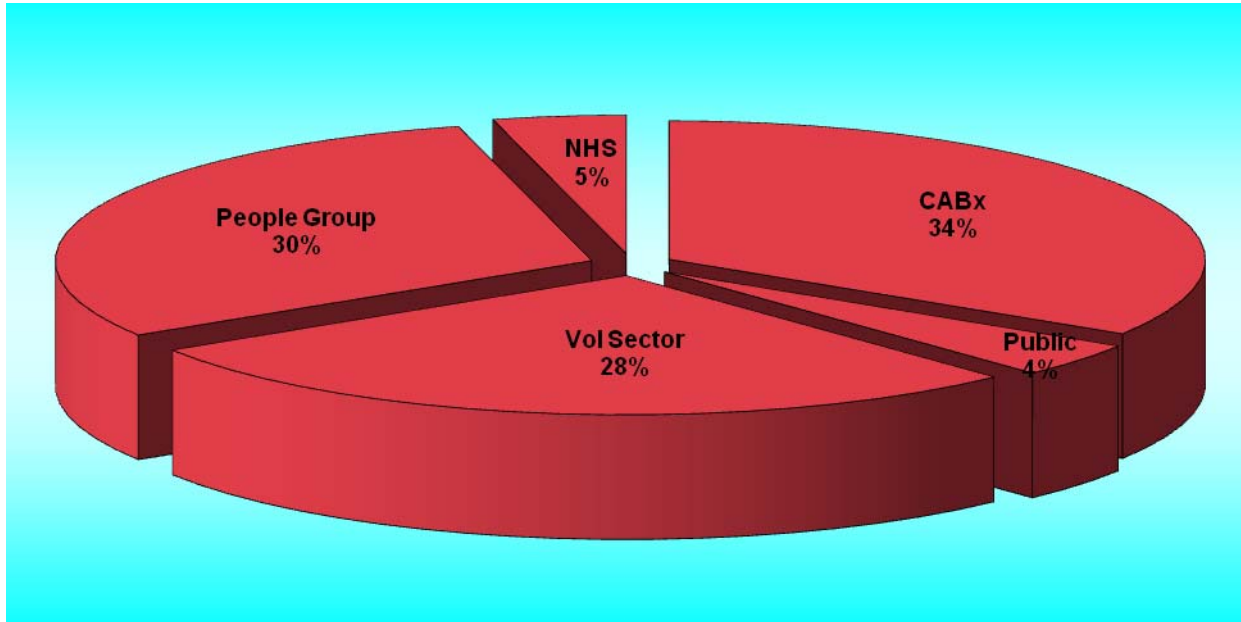
Within the People Group, just under **17%** of calls came from Children's Services and just under **14%** from Adult Health colleagues. This is an increase of 5% and 3% respectively compared with last year's usage. For the second consecutive year we received more calls from Children's as opposed to Adult's. 4% of calls were from NHS or joint NHS Teams, which is roughly on a par with last year's usage.

34% of calls came from CABx, which represents a significant reduction compared with the 42% share of total enquiries we received last year from Bureaux. This reduction deserves some comment.

A lot of the enquiries to the BEL from CABx have historically been linked to appeal referrals and since the introduction of our revised referral criteria we have done a lot of work with CAB to familiarise them with our new referral criteria, by going out and speaking to staff teams and providing short training sessions on how to deal with appeals and the new mandatory reconsideration process. This has meant less reliance on the BEL and will also be due to the fact that we used to specify that CAB had to call the BEL when making a referral to ensure that it was appropriate. With the new referral criteria and the work we have done with CAB to improve the quality of their referrals this is no longer necessary, although if it is a borderline case or a complex appeal then we will still encourage the CAB adviser to speak with a WWRAS BEL adviser.

The reduced number of enquiries from CAB could also correspond with a general reduction in appeal referrals which is both a local and national issue. This is mainly due to significant delays in decision making by the DWP around Personal Independence Payment (PIP) cases, so that very few appeals have been received against this benefit and delays in moving people from Incapacity Benefit (IB) to Employment & Support Allowance (ESA).

28% of calls were from other (mainly voluntary sector agencies) most of which are funded by WCC. We are not funded to provide a service to the general public as it is intended to be a consultancy line for front line professionals and we will always try and signpost or refer such callers to an appropriate service, although there are occasions where we cannot do so and we will provide some basic advice. The number of calls from members of the public directly accessing our helpline (**4%**) has significantly decreased over the past few years and remains on a par with last year.



Type of enquiry

Although we received **647** enquiries to the BEL last year, during those calls we dealt with **1,152** different benefit issues, which gives some idea of the complexity and in depth nature of the work that is carried out. Often, single calls will produce a multitude of different benefit issues as the relationships between the different benefits can be complicated and time consuming to deal with.

The majority of calls to the BEL still relate to disability and ill-health benefits with a broadly similar percentage split as last year. **Disability Living Allowance (DLA)** and **Attendance Allowance (AA)** made up **15%** of all enquiries (down from 20% last year) and the replacement for DLA - **PIP**, made up **3.5%** of all enquiries. Enquiries about **ESA/IB** remained fairly static and still remain our highest single enquiry area at **29%**.

34% of calls from frontline professionals were on behalf of clients with a mental health disability, whilst enquiries on behalf of people with a physical disability amounted to **31%** of all enquiries. **12%** of all enquiries to the B.E.L related to a child or young person, with **5.5%** of enquiries relating to pensioner benefits.

We record all cases on the B.E.L where we have helped to identify and advise on additional benefit claims and our work has helped to identify **£14,407** in potential unclaimed benefits this year. In addition our adviser's helped other front line professionals claim an additional **£57,963** in actual additional entitlements

STAFF as at January 2015

Chief Executive
Operations Manager

Mark Stanyer
Stephen Watkins

Appeals Workers

Rachel Wilcox
Jill Wood
*Mary Williams (retired July 2014)
Caroline Harrison
*Tim Feuser (started October 2014)

*Appeals and take-up work

Take-Up Workers

Bal Sandhu
Anne Richardson

Freelance Welfare Rights
Adviser/Trainer

Jacqui Gardner

Admin Assistants

Sam Morgan
Denise Peach
Kawser Khalifa

TRUSTEE BOARD

Acting Chair and Director

Greg Gavin

Treasurer

(Position currently vacant)

Company Secretary

Mark Stanyer

Directors

Ramby De Mello
Peter Eaves
Steve Lloyd
Martyn Ashford
Sally Roberts
Janice Nichols *(joined July 2013)*

CONTACT BOX

Mark Stanyer – Chief Executive

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For Operational Matters

Contact **Stephen Watkins** on 024 7637 2069 x21

e-mail: stephen.watkins@wrras.org.uk

For Training/Website

Contact **Sam Morgan** on 024 7637 2069 x29

e-mail: sam.morgan@wrras.org.uk

For Information

Contact **Denise Peach** on 024 7637 2069 x32

e-mail: denise.peach@wrras.org.uk

Main office number: 024 7637 2069

Benefits Enquiry Line: 0845 241 0396

10am – 1pm Monday, Wednesday and Friday
[Advisers only – not for members of the public]

OR

(for all of the above)

Fax: 024 7637 5033

e-mail: info@wrras.org.uk

Address: 1 Stratford Street, Nuneaton, CV11 5BS