

# ANNUAL REPORT 2007 – 2008

*Devon Welfare Rights Unit*  
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**THIS REPORT IS AVAILABLE AT**  
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**STAFF LIST**

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| <b>Llinos Davies</b>   | Training Programme Administrator<br>(part time )               |
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*Company Registration No 1436945 Charity Registration No 279057*

## **The AIMS of CITIZENS ADVICE are:**

- ❖ To ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the service available to them or through an inability to express their needs effectively.  
  
and equally
- ❖ To exercise a responsible influence on the development of social policies and services, both locally and nationally.

## **The AIMS of DEVON WELFARE RIGHTS UNIT are:**

- ❖ To improve the availability and quality of welfare rights advice and social policy work in Devon, by delivering training, consultancy and support to organisations providing advice to the public.  
  
*and equally*
- ❖ To identify and act upon social security issues which have implications for social policy.

## ANNUAL REPORT 2007-2008

This report outlines the main achievements, developments and challenges which Devon Welfare Rights Unit dealt with during the financial year 2007/08.

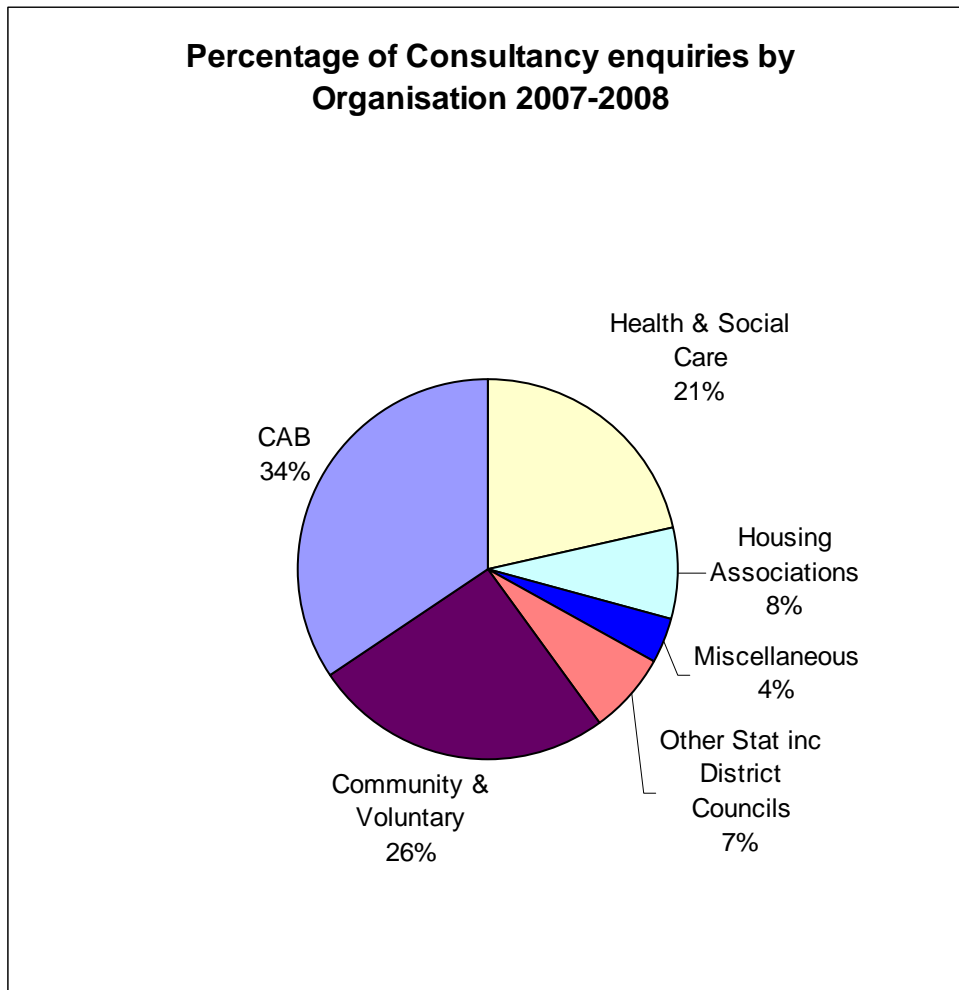
The written report provides a summary overview and is also available on the Devon Welfare Rights Unit website: [www.dwru.org](http://www.dwru.org) All agencies currently listed on our mailing list with an e-mail contact will automatically receive an e-mail providing the electronic link to the website.



**Consultancy:**

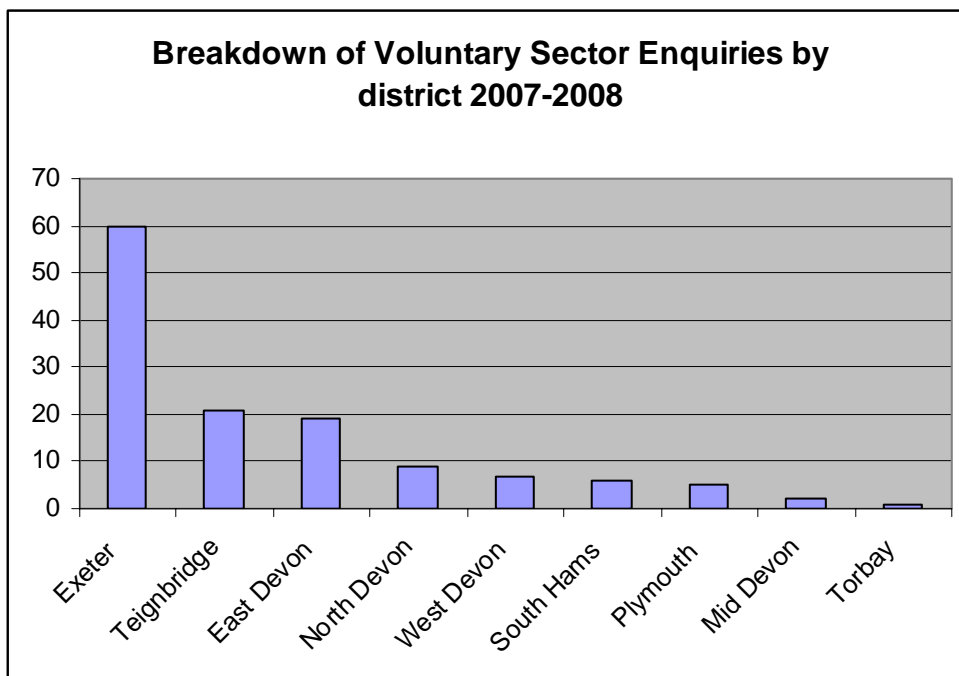
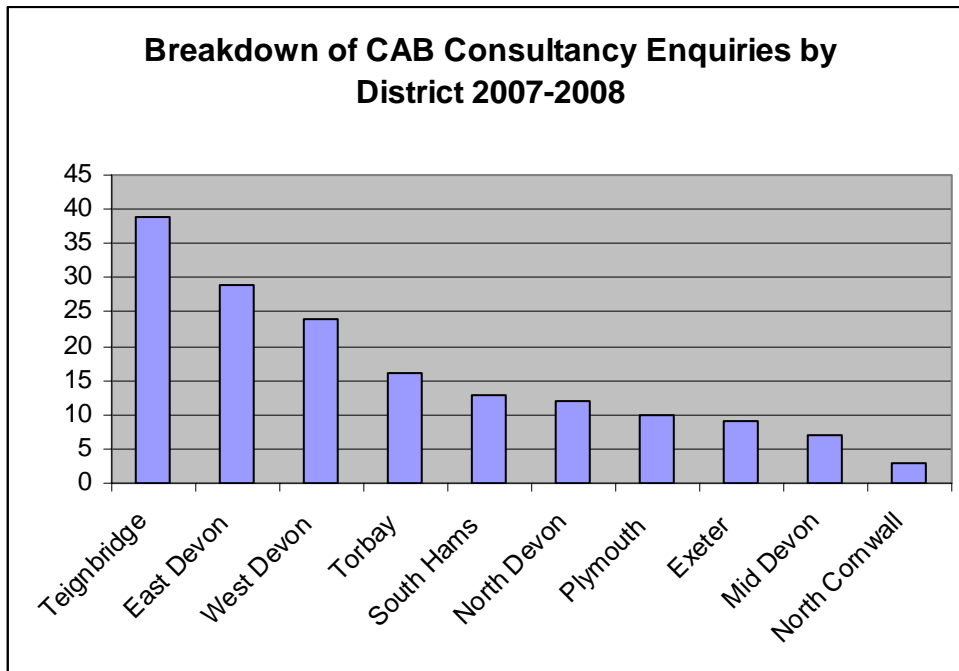
We continued to provide a telephone/email/fax access consultancy service which dealt with a total of 518 enquiries during this period, compared to 402 during 2006/2007. This represents a significant increase in usage this year, spread more or less equally across the range of types of organisation using the service.

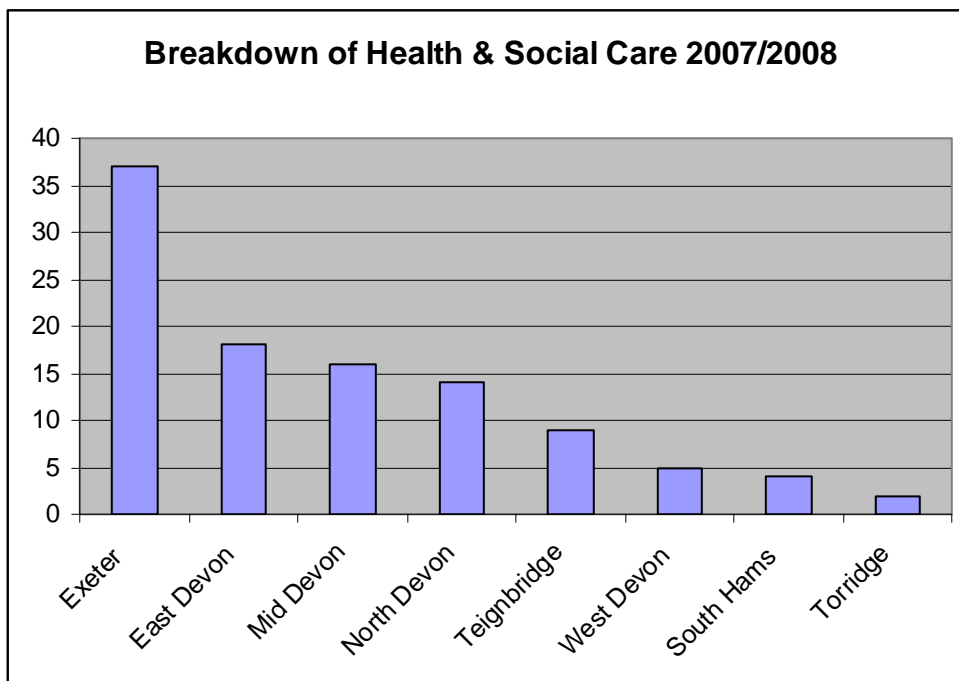
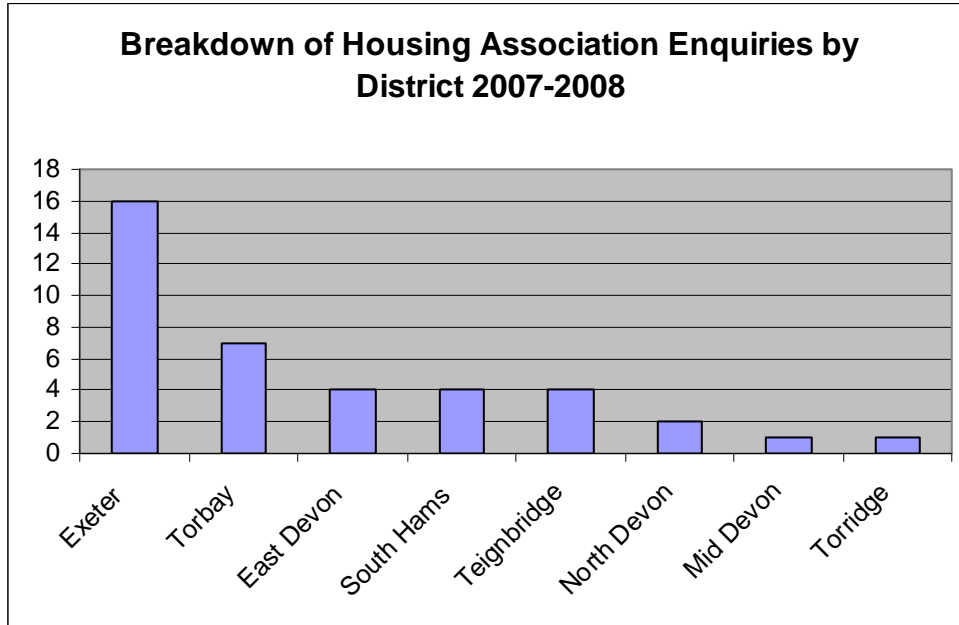
Chart 1 and the table below demonstrate the breakdown of consultancy enquiries dealt with by organisation, as compared to 2006/07.

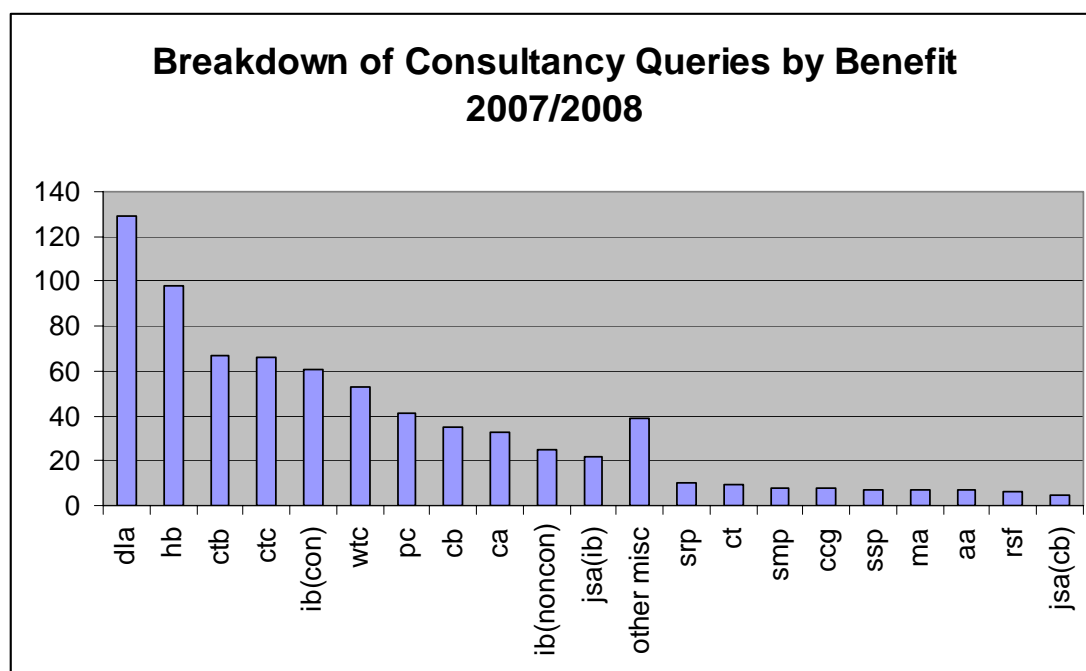


| <b>2006/2007</b>                             |     | <b>2007/2008</b>                             |     |
|--|-----|--|-----|
| CAB  | 132 | CAB  | 176 |
| Community & Voluntary Sector                 | 100 | Community & Voluntary Sector                 | 132 |
| Health & Social Care                         | 97  | Health & Social Care                         | 110 |
| Housing Associations                         | 25  | Housing Associations                         | 40  |
| Other Statutory Sector inc District Councils | 32  | Other Statutory Sector inc District Councils | 36  |
| Miscellaneous                                | 15  | Miscellaneous                                | 19  |

**Detailed Breakdown of Consultancy Enquiries 2007-2008**







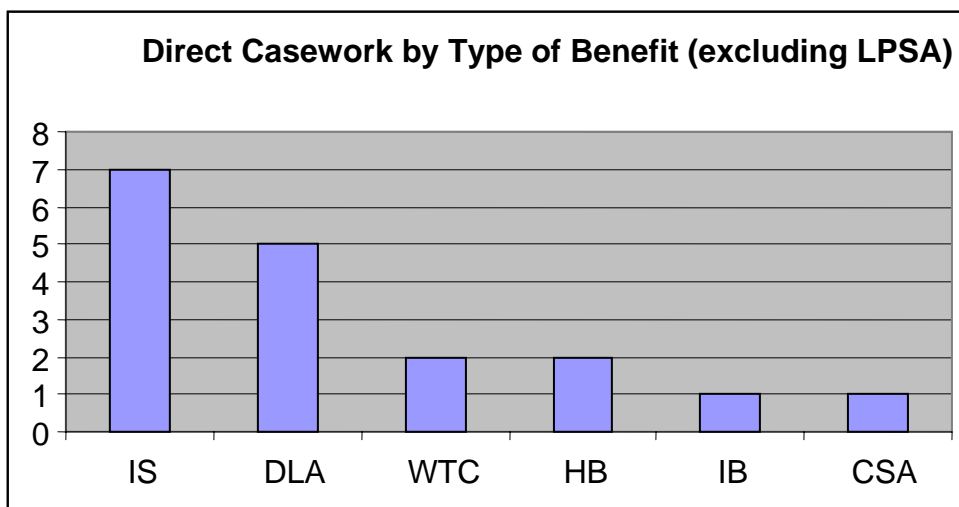
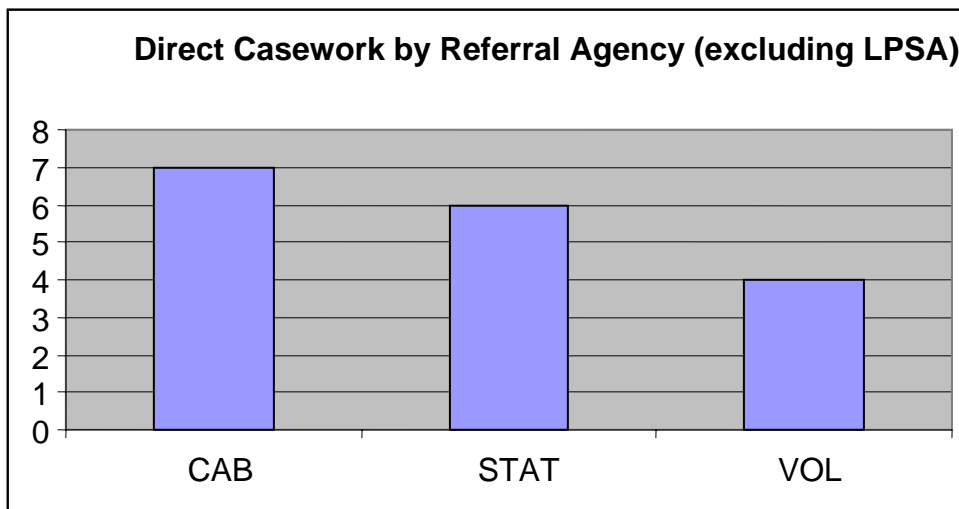
### Table of Abbreviations

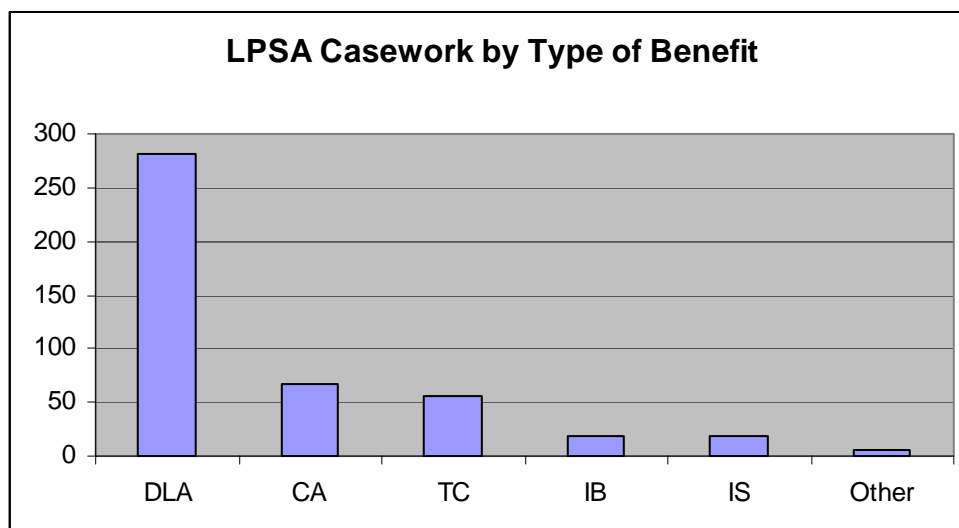
|     |                             |         |   |
|-----|-----------------------------|---------|---|
| aa  | Attendance Allowance        | ib      | Incapacity Benefit                      |
| cb  | Child Benefit               | is      | Income Support                          |
| ccg | Community Care Grant        | jsa(ib) | Job Seekers Allowance<br>(income based) |
| ct  | Council Tax                 | ma      | Maternity Allowance                     |
| ct  | Council Tax                 | pc      | Pension Credit                          |
| ctb | Council Tax Benefit         | smp     | Statutory Maternity Pay                 |
| ctc | Child Tax Credit            | srp     | State Retirement Pension                |
| dla | Disability Living Allowance | ssp     | Statutory Sick Pay                      |
| hb  | Housing Benefit             | wtc     | Working Tax Credit                      |

**CASEWORK:**

The unit dealt with 78 pieces of indirect casework (compared with 66 2006/07) and managed 15 general direct cases during this period ( compared to 10 during 2006/07). In addition during this year the unit dealt directly with 672 LPSA2 funded cases targeting families with children with special needs in Devon (of which 330 resulted in additional benefit gains).

As ever, the demand for casework outstrips the available resources and we have continued to take on direct casework in accordance with our strict priority policy.



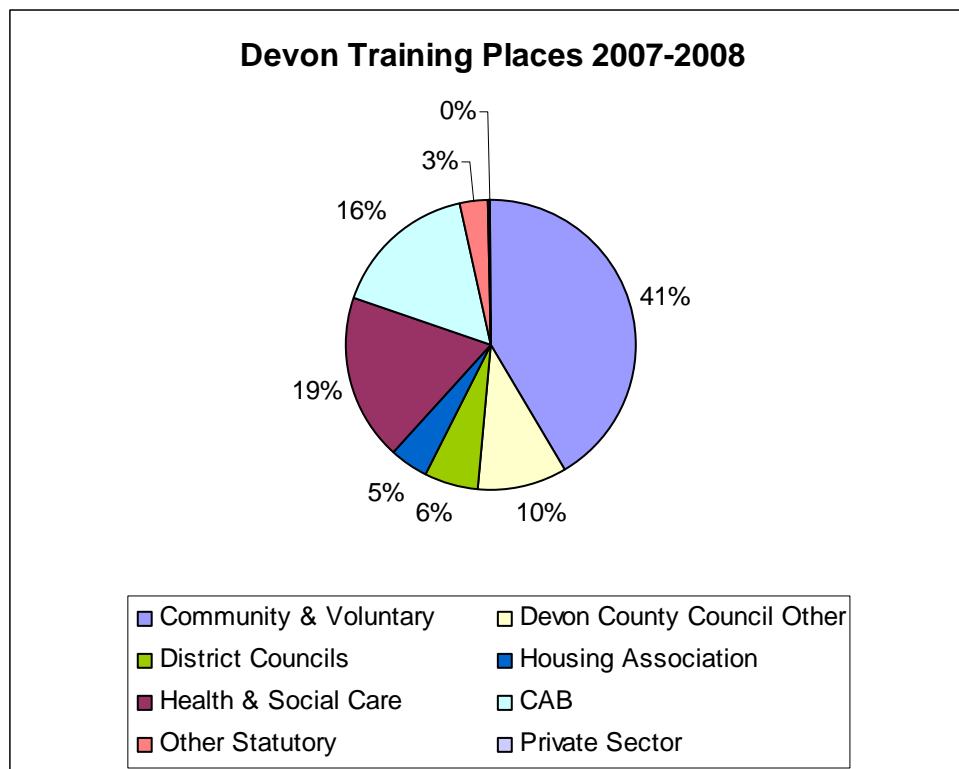


- See page 15 for more detail on the LPSA2 casework undertaken during this year

**TRAINING:**

We delivered 81 (14 less than 2006/07) different benefits training events at local venues across the county, through our Devon Strategic Partnership funded training programme, providing training to 1,119 participants ( as compared to 1,106 2006/07) from both the voluntary and statutory sector in Devon. This was the final year of a 3 year funding contribution commitment from the district, Borough and City councils in Devon during this period and we are hopeful that the training programme will continue to receive this level of support 2008 onwards.

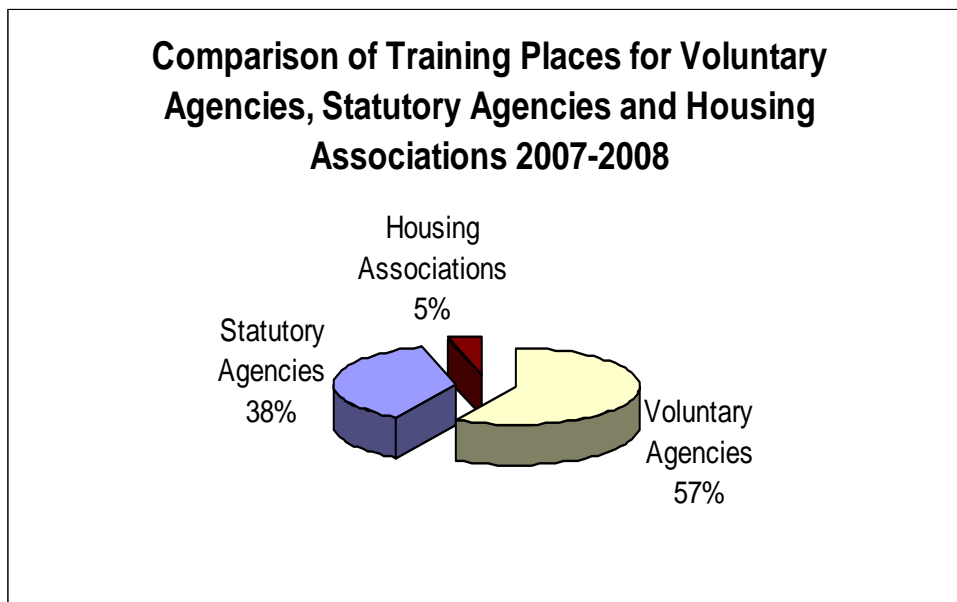
|  | 2006/2007    | 2007/2008    |
|--|--------------|--------------|
| <b>Total number of training events</b> | <b>95</b>    | <b>81</b>    |
| <b>Total number of training places</b> | <b>1,106</b> | <b>1,119</b> |



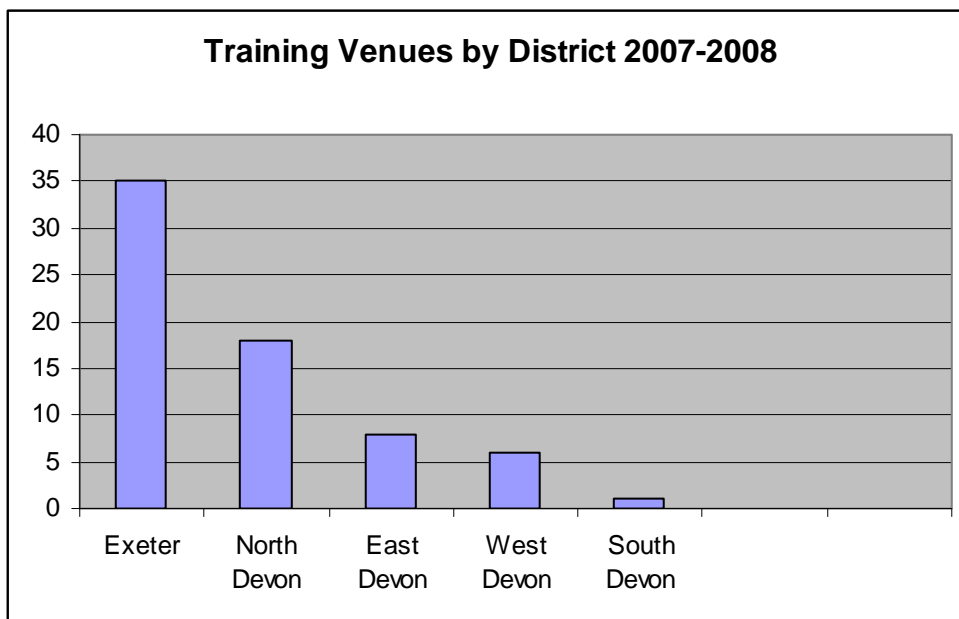
**Devon Training Places 2007-2008  
Booked/Attended**

|                              | <b>Places</b> |
|------------------------------|---------------|
| Community & Voluntary Sector | 463           |
| Health & Social Care         | 209           |
| CAB                          | 184           |
| Devon County Council Other   | 113           |
| District Councils            | 63            |
| Housing Associations         | 51            |
| Other Statutory              | 34            |
| Private Sector               | 2             |

There were some interesting variations when comparing this year's take up of training places against the previous years. The take up by Voluntary & Community Sector organisations increased by 14%. Although take up by County Council staff remained about the same overall, the number of Health & Social Care staff fell by 34%. We will continue to endeavour to provide signposting training to increased numbers of Health & Social Care staff in Devon.



|                      |            |
|----------------------|------------|
| Voluntary Agencies   | 647 places |
| Statutory Agencies   | 419 places |
| Housing Associations | 51 places  |



### **Some feedback received from Delegates Attending Training Courses 2007-2008**

*'An excellent communicator with a passion for her subject'*

*'As always, delivery of information and its content was brilliant – well done DWRU – keep up the good work'*

*'Thank god you are here x!'*

*'Excellent – very useful, informative and given me confidence to continue form filling'*

*'No time for boredom'*

*'Excellent and cheap'*

*'Real and genuine patience'*

*'Brilliant! Eloquent! Knowledgeable, interesting, pleasant, approachable, sense of humour, kept one's interest, empathetic'*

*'Interesting, funny!'*

*'I found the course and the handouts very helpful and am sure they will prove useful in the future. Thank you'*

*'Excellent course – I will recommend that others from my organisation sign up. Most relevant course for my work. Thank you.'*

*'Excellent information given and good demonstrations with case studies'*

*'Taught with great grace'*

*'Informal and approachable with appropriate level of humour'*

## Devon Strategic Partnership Projects:

i) **“Advice Guide for Employees” and “Signposts ABC Guide to Benefits and Tax Credits Advice in Devon”**: We continued to promote and distribute these resource booklets, this year

ii) **LPSA 2 Benefits Take-Up Project for families with children with special needs:**

This year, the project dealt with 672 families, resulting in 330 successful additional benefit claims.

In total, we have raised £2.6 million in benefits and tax credits for over 600 families with children with disabilities/ special needs in Devon since 2005. The funding for the work came through Devon County Council's Local Public Service Agreement (2005-2008) with Central Government. The target was to assist 500 families at an average of about £800 per annum to obtain additional benefits. In the event, the average gain for each of the 600 families is over £4,000 per annum.

The project involved partnership work with a range of organisations. Referrals to the service were made in a variety of ways. The Joint Agency Teams (JAT) in Devon wrote to all families on the Joint Agency Record inviting them to contact DWRU for independent benefits advice and assistance. Surgeries were held in special schools and Children's Centres, talks given to parents and carers groups and training provided to JAT. Referral processes were set up with local statutory and voluntary organisations who are in contact with families with children with disabilities. On receipt of referrals, DWRU discussed potential entitlement with parents and carers and made appointments (mainly home visits) to complete forms, write revisions or lodge appeals as necessary. Advisers also provided tribunal representation.

Over 60% of the families contacting the project had potential additional entitlement to benefit. A great deal of the cases concerned situations in which people had either not claimed Disability Living Allowance or had claimed it but were on the wrong rate of benefit.

One feature of the Local Public Service Agreement is that, where targets are met, Central Government provides 'reward' funding to assist with the continuation of the service. At the time of writing, DWRU awaits a final decision on this, but, in the meantime, the service is continuing.

DWRU is in the process of writing a comprehensive report on the project which will be available later in the year. One of the report's main recommendations will be that the service should continue. A main conclusion is that in a climate where there is a drive to eradicate child poverty, where services for children are driven by the *Every Child Matters* initiative, it is vital that families with children with special needs be given the information and assistance which at the very least enables them to access their basic entitlement to state benefits.

## **Fairer Charging:**

Devon Welfare Rights Unit continued to be commissioned by Devon County Council to Process manage the Devon Joint Finance and Benefits Team and to coordinate eight Citizens Advice Bureau Finance and Benefits Team Visiting Officer contracts in Devon. Throughout the period the Unit has also been represented on the Joint Team Strategic Management Board.

2007 -2008 has seen exciting and challenging changes for the Joint Team. In April 2007, the appointment booking functions were transferred from The Pension Service to Devon County Council Client Finance Services who now have a team of three staff who take referrals to the team from across Devon and book visits for the Visiting officers. This transfer represented a major change to the referral and booking process but was successful managed without a break in service.

The Pension Service stopped carrying out first visits and financial assessments though they continue to be referred follow up visits for pension age clients who have been identified during the initial visit as requiring assistance with benefit claims.

Between 2006 and 2008, The Devon Joint team delivered a financial assessment and benefit check service to 6868 social services, service users in their own homes. 93% (6387) of these were visited within 10 days of the referral being received. A total of 3,281 households have been assisted to make additional benefit claims for a total of approximately £3.4 million. 48% of all clients were identified as having additional entitlement to benefits, the majority of claims being for increases to Attendance Allowance and Pension Credit.

**Local Partnerships the Unit has actively participated in this year:**

|   |
|---|
| <b>DSP Access To Benefits Implementation Group</b>  |
| <b>South West ( Devon) Pound Trustee Board</b>  |
| <b>DSP Common Ground Partnership</b>  |
| <b>Devon Migrant Worker Task Group</b>  |
| <b>DCC Disability Information Service Steering Group</b>  |
| <b>LPSA2 Children and Families Benefits take up Project Steering Board</b>                                  |
| <b>Devon Joint Finance and Benefits Team Strategic Board</b>  |
| <b>Devon Carers' Link Group Benefit Check Service</b>   |
| <b>Devon Stronger Inclusive Communities Partnership Forum</b>   |
| <b>LAA 15 Working Group addressing financial inclusion and social integration of vulnerable populations</b> |

## **Key Challenges**

As ever, the key challenges facing the unit are the same as those facing all of our voluntary sector partners, revolving around issues of resources and funding. We are lucky, however in the level of support we receive from Devon County Council and other funding partners through the Devon Strategic Partnership. We look forward to continuing our positive relationships with our funding partners in Devon.

A main aim for the forthcoming year is to continue to work together with our voluntary and community and statutory sector partners to improve access to Welfare Benefits across Devon and to further develop a new approach to the mainstreaming of benefits information, advice and advocacy services throughout Devon in a sustainable way through the Local Area Agreement (LAA) Priority "Work towards the economic inclusion and social integration of vulnerable populations"

The success of a number of LAA priorities is in part dependent upon the financial security of their target populations. The impact of poverty on health inequality, disadvantage amongst children and young people, fuel poverty, housing choices etc is clear and Devon's most disadvantaged communities experience low income and financial instability.

The success of income maximisation initiatives, including targeted benefits take-up projects and the provision of high quality benefits and tax credits training for demonstrate the importance of streamlining and aligning/integrating traditional approaches to encompass all vulnerable populations.

The proposed strategy will review successful elements of work to date and develop the methodology for mainstreaming. It will identify the contribution that each partner is making or might make and support them to engage with the project and consider review/change of service models to deliver the outcomes. It will co-ordinate specific projects on behalf of the DSP to meet need. The elements of the strategy include:

1. A long term campaign aimed at changing attitudes towards the income maximisation process and removing barriers to claiming Benefits and Tax Credits
2. Aligning and integrating, where possible, services designed to improve access to advice and information services across the county
3. A focus on key life event trigger points where the public might expect to come into contact with service providers.

We would like to express our gratitude and appreciation to all our partners, both in service delivery and funding and strategic development, without whom our achievements during this period would simply not have been possible.

We hope you will agree that during 2007 – 2008, Devon Welfare Rights Unit has succeeded in furthering our twin aims:

- To improve the availability and quality of welfare rights advice and social policy work in Devon, by delivering training, consultancy and support to organisations providing advice to the public
- To identify and act upon social security issues which have implications for social policy

If you would like any additional information on any of the activities described within the full report, please contact Devon Welfare Rights Unit on 01392 431616 or [dwru@citizensadvice.org.uk](mailto:dwru@citizensadvice.org.uk)

Nora Corkery,  
**Manager, Devon Welfare Rights Unit.**