

ANNUAL REPORT

2009 – 2010

DEVON WELFARE RIGHTS UNIT

**A CITIZENS ADVICE SPECIALIST 2ND TIER WELFARE
BENEFITS AND SOCIAL INCLUSION SERVICE**



**PROVIDING SPECIALIST SUPPORT TO
ORGANISATIONS IN DEVON SINCE 1989**

**citizens
advice
bureau**

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Devon
County Council 

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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

- ❖ **To identify and act upon social security and social care issues which have implications for social and financial inclusion.**

Section 1

DEVON WELFARE RIGHTS UNIT ANNUAL REPORT SUMMARY 2009-2010

This report outlines the main achievements, developments and challenges which Devon Welfare Rights Unit dealt with during the financial year 2009/10. The full report is available at www.dwru.org

2009/10 certainly proved to be a challenging, busy and productive year for the Unit and for our community at large as the impact of the economic downturn continued to have a significant impact from the outset. Devon Welfare Rights Unit also marked its 20th anniversary in November 2009 and celebrated with a key stakeholder event and social occasion.



Headline achievements

- **448** telephone & email benefits and tax credits enquiries received from VCS and statutory agencies in Devon
- Staff of **111 VCS & statutory agencies** in Devon assisted to develop their benefits casework /representation skills levels through **91 cases** in which DWRU specialist staff supported caseworkers in the field

- **Total of 566 cases** managed directly by DWRU

Including

46 cases managed as part of the Tackling the Impact of the Economic Downturn project resulting in additional income for people in small businesses in Devon damaged by the economic downturn (see section 6 of full report)

And

456 Quids 4 Special Kids cases (see section 4 of full report)

And

10 directly managed cases for 2gether pilot with Devon Children's Services (see section 8 of full report)

And

8 directly managed cases for Making Work Pay project through LAA Worklessness Task Group (see section 7 of full report)

- **1,397** participants trained from **131** VCS and statutory agencies
- **100** different training sessions and Learning events delivered across all districts of the county (see section 3 of full report)

- **£1,385,000 Q4K** value of additional benefit gain achieved in this financial year
- **£3,551,388.70** estimated additional benefit gain achieved for social care service users by the Joint Finance & Benefits Team process managed by DWRU (**£728,490.60** verified by The Pension Service to date – see section 5 of full report)
- **£206,200** verified additional income achieved for **85** households in Devon hit by the Economic Downturn (Projected total to date **£450,000** – see section 6 of full report)

In summary

Devon Welfare Rights Unit has continued to take on a lead partner agency role this year in relation to LAA 15(a) “ Working towards the economic inclusion and social integration of vulnerable populations”. Key elements of this strategy include the promotion of a “life events model”, building clear pathways to advice in Devon by working towards a “no door the wrong door” approach through the development of a strong partnership between the key third sector advice providing agencies in Devon based around the “Total Place” strategy for a whole area approach to the design and delivery of benefits and money advice and financial inclusion. This strategy is evolving from a traditional benefit take –up model to encompass a much broader agenda of debt and money advice provision as well as improved access to affordable financial services.

DWRU has continued to work in close partnership with the CAB service of Devon and this year has been involved in the emerging single Devon CAB Service Strategy. The Unit has also participated in the formative period of the development of a Devon Advice Network (Ask DAN) and the County Reducing

Child Poverty Task Group as well as contributing to the new Carers Strategy for Devon.

As we look ahead in the context of the current economic difficulties, it is helpful to keep our organisation's main aim at the heart of all we strive to achieve :

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

The key challenges facing the unit are the same as those facing all of our public sector partners, but we remain confident that we can continue to build upon the strong foundations of partnership working within the area of social and financial inclusion work in Devon. There are undoubtedly difficult times ahead and in so doing, the aspiration is that the Unit will be well positioned to make a vital contribution to the further development of this agenda and the renewed debates on welfare reform at both national and local levels as well as helping to ensure that the most vulnerable groups in our communities are protected as much as possible from the cuts in services and benefits which sadly are looming on the horizon.

As in previous years, we would like to express our gratitude and appreciation to Devon County Council, our primary funder, and all our partners, both in service delivery and funding and strategic development. In addition it is important to recognise the continued outstanding level of commitment and dedication demonstrated by the staff of Devon Welfare Rights Unit without whom our achievements during this period would simply not have been possible.

Let us hope that we continue into our third decade!

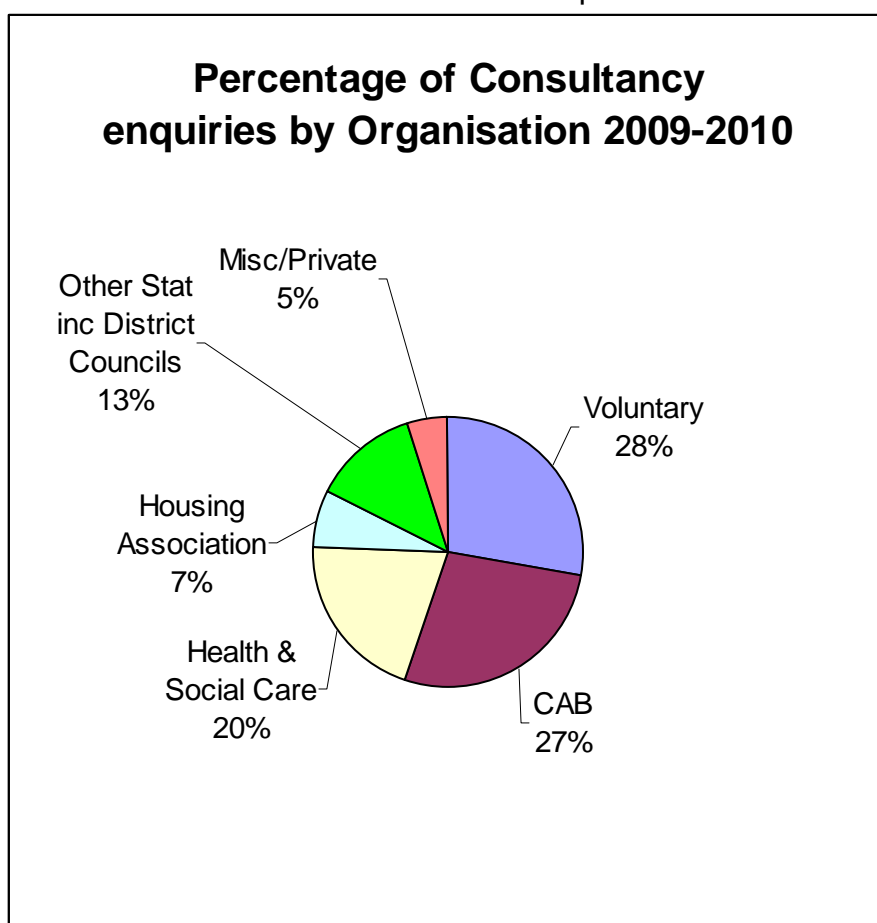
Nora Corkery
Manager, Devon Welfare Rights Unit
July 2010

Section 2

CONSULTANCY

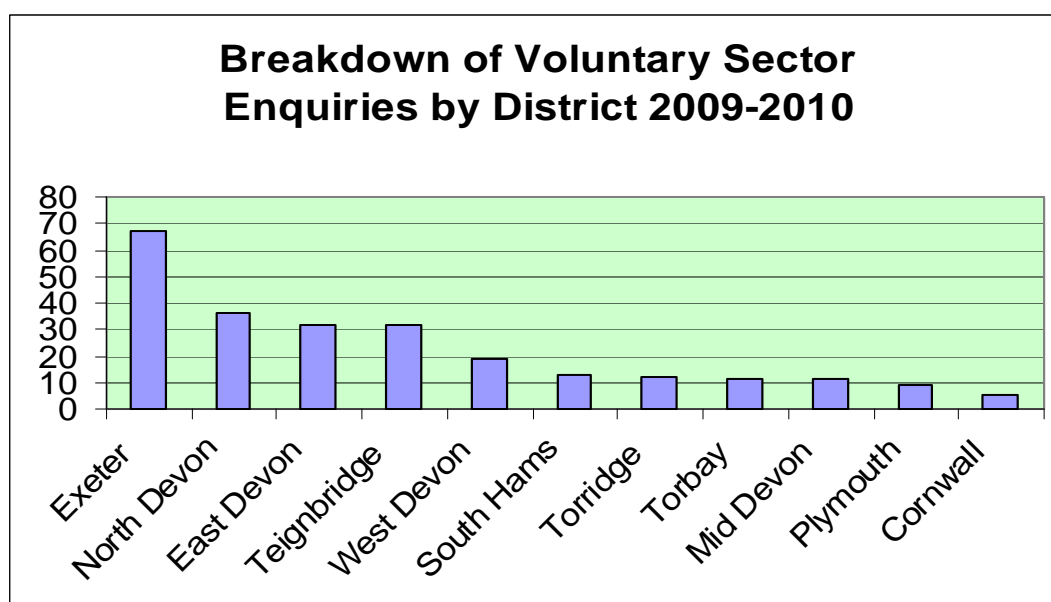
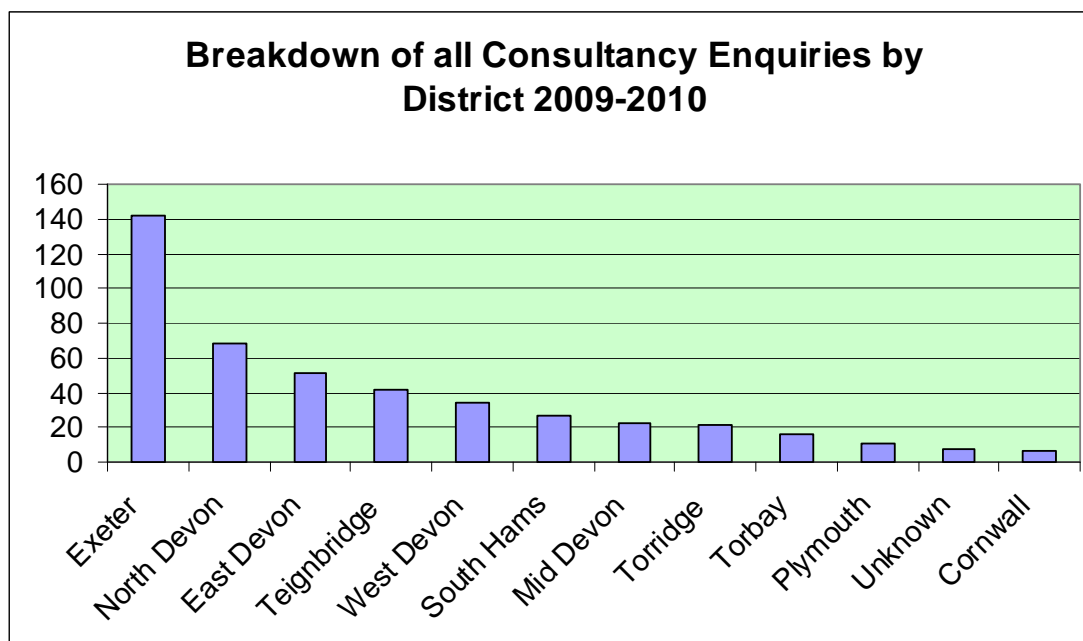
448 enquiries were dealt with during 2009/2010 compared to 467 during 2008/09. Of these 284 enquiries were made by phone, 161 were via e-mails and 3 were via fax. Of the 161 e-mail enquiries, 19 came to us via the consultancy and contact pages of our website.

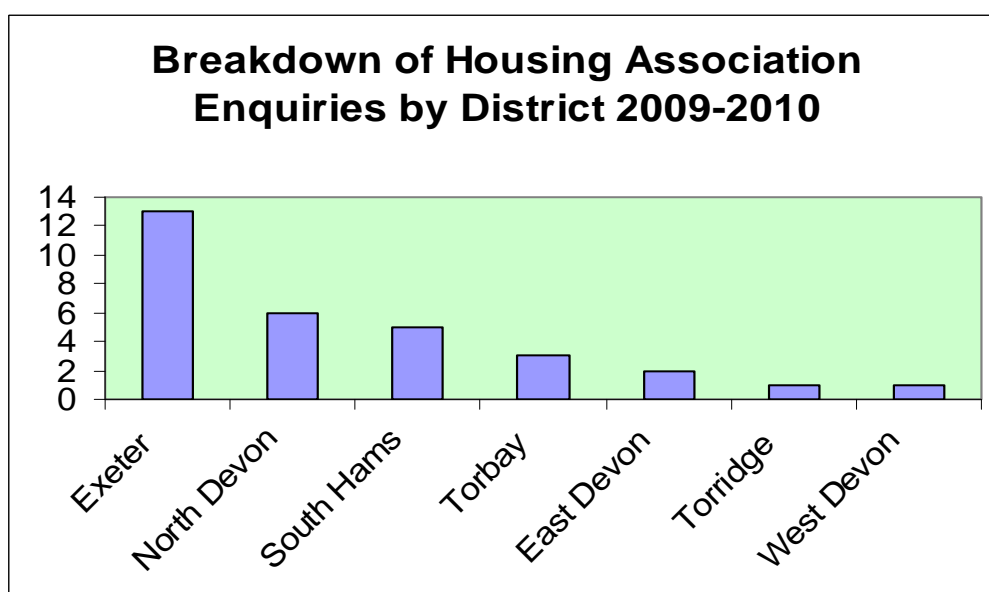
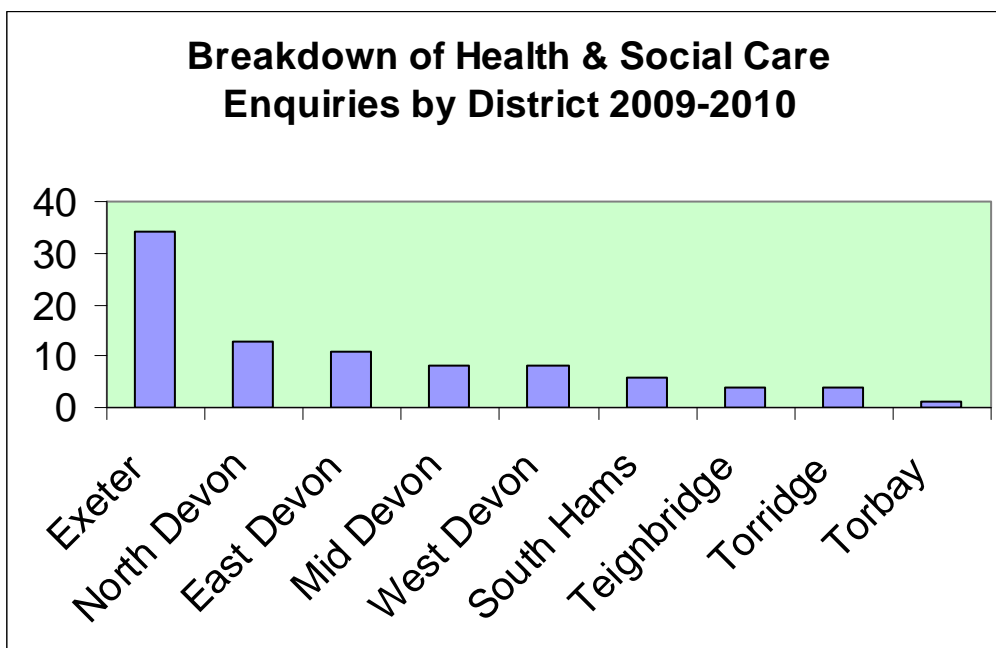
Chart 1 demonstrates the breakdown of consultancy enquiries dealt with by organisation and the table below shows the comparison to 2008/09.



2009-2010		2008-2009	
Voluntary	125	Voluntary	122
CAB	122	CAB	130
Health & Social Care	91	Health & Social Care	125
Other Stat inc District Councils of which 18 are County Council	58	Other Stat inc District Councils	50
Housing Associations	31	Housing Associations	30
Miscellaneous/Private	21		10

Detailed Breakdown of Consultancy Enquiries by District 2009-2010





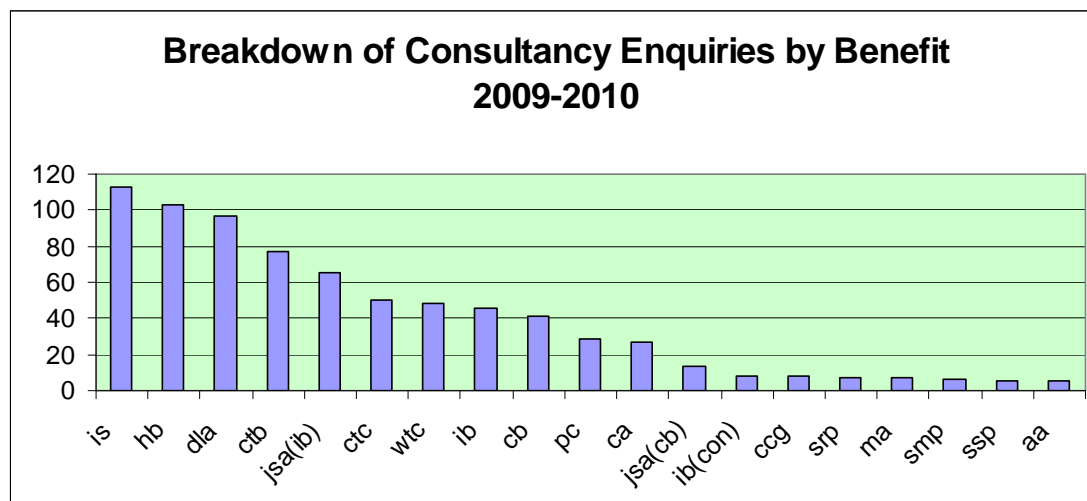


Table of Abbreviations

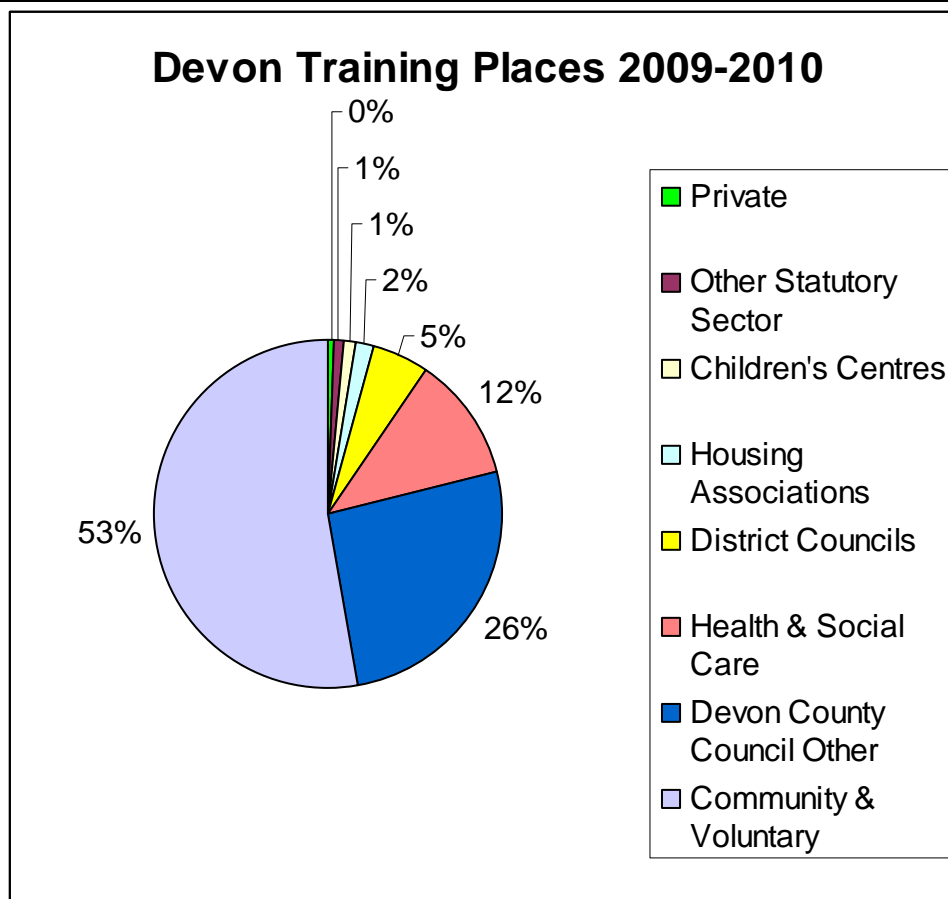
AA	Attendance Allowance	IDB	Industrial Injuries Disablement Benefit
CA	Carers Allowance	IS	Income Support
CCG	Community Care Grant	JSA	Job-Seekers Allowance
CTB	Council Tax Benefit	MA	Maternity Allowance
CTC	Child Tax Credit	PC	Pension Credit
DLA	Disability Living Allowance	SRP	State Retirement Pension
ESA	Employment Support Allowance	SSP	Statutory Sick Pay
HB	Housing Benefit	SMP	State Maternity Pay
IB	Incapacity Benefit	WTC	Working Tax Credit

Section 3

TRAINING

This year, we provided 100 training events and trained 1,397 participants from both the voluntary and statutory sector in Devon. This represents an increase of 18 events and 178 participants on last year's figures.

	2008/2009	2009/2010
Total number of training events	82	100
Total number of training places	1,219	1,397



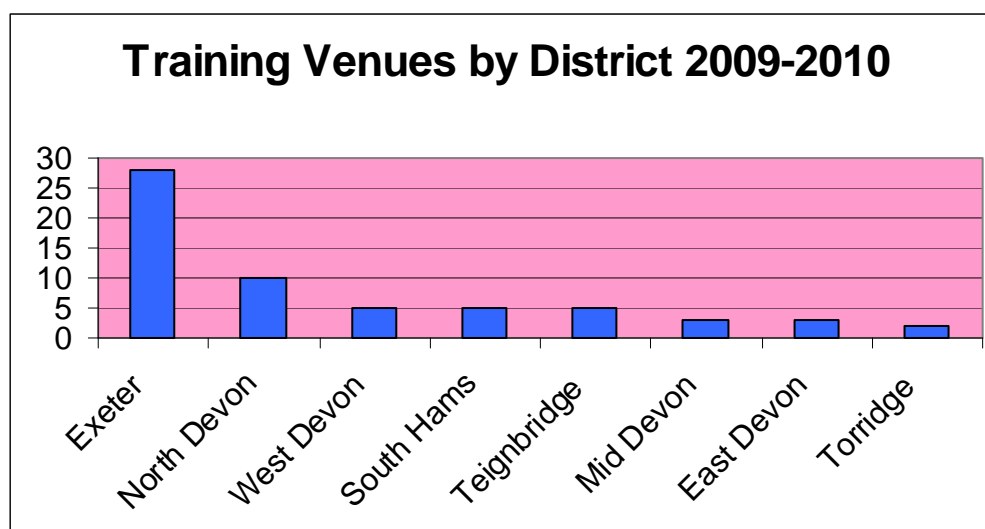
	Places	
	2008/09	2009/10
Community & Voluntary Sector*	898	736
Devon County Council Other	166	365
Health & Social Care	65	166
District Councils	51	72
Housing Associations	30	22
Children's Centres	-	17
Other Statutory Sector	6	13
Private	3	6

Includes 219 (08/09) and 312 (09/10) places taken up by Citizens Advice Bureaux

There were some interesting variations when comparing this year's take-up of places with the previous year:

- Last year, 74% of places were taken up by the Community and Voluntary Sector as compared with 53% this year. Given the increase in the number of places taken up by Citizens Advice Bureaux, the drop in overall take-up by the Voluntary and Community Sector probably reflects increased pressure on budgets for this sector.
- This year's increase in the overall total of places is largely explained by the numbers of statutory sector staff trained this year. They account for over 40% of places this year as opposed to about 25% of places in 2008/09. This increase reflects our partnership work with the statutory sector and, in particular, our work with Children and Young People's Services.

We have continued with our policy of providing training at venues in all districts of Devon in an attempt to make training as accessible as possible. Courses are categorised into varying levels of specialism, with fewer courses provided for more specialist advisers. We tend to run these courses centrally (in Exeter) and to provide more courses in Exeter generally because of population density.



On the basis of this year's increase in figures, there is no evidence of any diminution in the appetite amongst advisers in Devon for training on income-maximisation through the benefits and Tax Credits system. Devon Welfare Rights Unit will continue to strive to meet the demand for training as resources allow.



Some feedback received from Delegates attending Training Courses 2009-2010

“Vincent’s knowledge is amazing!”

“Good as it gets!”

“Tutor has practical and diverse experience with subject

matter which enhanced course content”

“The course proved the complexity of the benefit system. Therefore the need for their ‘expert’ service.”

“Found this very useful. Great to have handouts and information to read through in own time.”

“Good to do scenarios and to go away with the signpost booklet.”

“A most interesting and helpful course relevant to several clients I am currently working with. I have previously used things learnt on courses from DWRU to the benefit of clients, even managing to argue a case with a customer adviser with regard to ESA – I was right.”

“I found it very useful, especially the ABC Guide.”

“Really valuable.”

“Very helpful! I feel I have a much clearer understanding of benefit rights and the ABC Guide will be extremely useful in my work with families.”

“Easy to understand. Feel more informed. Now know where to signpost.”

“Excellent course. Good practical help.”

Section 4

QUIDS 4 SPECIAL KIDS



Phase two (2008-2011) of the benefits advice project for children and young people under 22 with additional needs is funded by Devon County Council under Local Area Agreement 15(a): Economic Inclusion and Social Integration of Vulnerable Populations.

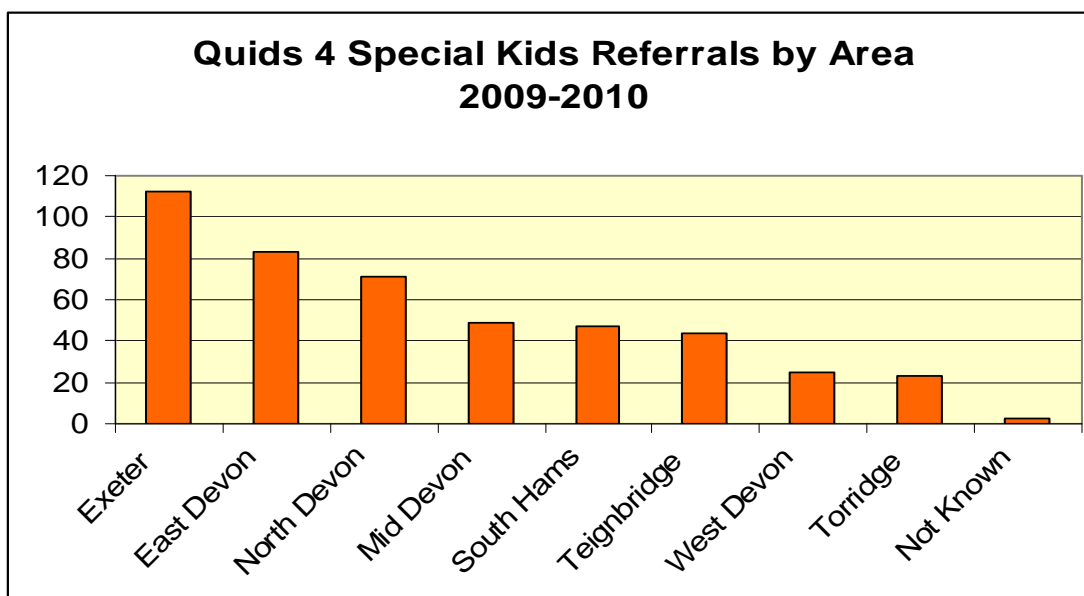
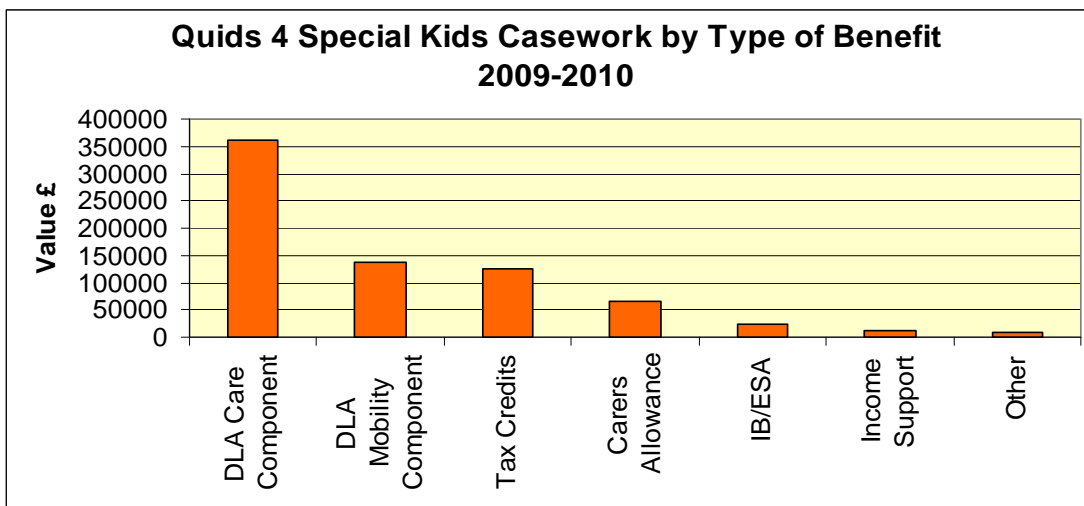
The service is managed, co-ordinated and part delivered by Devon Welfare Rights Unit, and involves the provision of comprehensive advice and assistance to households in Devon where there is a child or young person with additional needs or disabilities with a view to ensuring that they receive their full entitlement to benefit and tax credits. This is done by way of initial diagnostic contact from a welfare rights officer, followed where appropriate by face2face contact – usually home visits – to provide more in-depth specialist support. The service also provides representation to First and Upper Tier Tribunals in disputed decisions about entitlement.

The last year has continued to provide a challenging workload of new and repeat referrals from across the county. Amongst the highlights of the year were the establishment of two bureau-based caseworker posts: Ros Thomas was appointed by North Devon Citizens Advice Bureau and works from Barnstaple, covering Torridge, North and Mid Devon; later in the year Clara Cohen began work from Teignbridge Citizens Advice Bureau, visiting clients in Teignbridge, South Hams and West Devon. Their commitment and expertise has contributed significantly to the continuing success of the project.

There was a reasonable expectation that over time the number of families referred into the project would decline, as increasing numbers of eligible families would already have made use of the service. By contrast, the number of referrals has been consistent at approximately 500 annually. One explanation for this is the widespread use of short term awards of Disability Living Allowance, so that renewal claims for some children have been made twice or more since the project began in 2005. Another is that we are able to respond to families very early in a child's life, where appropriate, by way of referrals from paediatricians and specialist children's development centres. In this way the benefits advice service helps families by ensuring that their entitlements to benefits and tax credits are in place long before they are likely to be involved with multiple agencies, putting them in a stronger position in the early years of managing the complexities of raising a child with additional needs. Finally, the network of partners both statutory and third sector, local media coverage and the informal networks of parents and carers contribute significantly to raising awareness of the service.

Project outcomes have surpassed both targets and expectations: targets for the full three years of this stage of the project (to March 2011) have already been exceeded in terms of both numbers of households (currently 1055) and additional benefit and tax credit entitlements secured (over £5 million to date). Alongside those quantified results is the steady stream of feedback from families who have used the service: *“A fantastic service!!! ..It is challenging caring for a child with a disability and the great support given .. by Devon Welfare Rights Unit makes such an incredible difference.”* *“Not only will it be a tremendous help to me financially but also has opened doors to other help and support both financial and otherwise.”*

Since the initial success of the project it has been a shared objective to mainstream this service within Devon County Council's existing services to children and families. Consideration of the various mechanisms for doing so is ongoing, with cross party expressions of support within the County Council. However, final decisions are unlikely prior to the Government's Spending Review later in the year. The business case is starkly underpinned by a return on investment in the order of 30:1!



Jude Giddings
 Devon Welfare Rights Unit, July 2010

Section 5

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 Citizens Advice Bureau Finance and Benefits Team Visiting Officer contracts in Devon. Five Citizens Advice Bureaux are contracted by Devon Welfare Rights Unit to provide visiting officers, who complete financial assessments and full benefit checks for those who are receiving chargeable care services from Devon County Council. Since 2006 the team had been providing visits for residential service users, generally visiting third party representatives, sadly due to a dramatic increase in the number of referrals

and with no funding available to increase visiting officer capacity, it was decided that the majority of the financial assessments for residential services be done by post with visits provided only on request or in obviously complex cases, initially this was to be a temporary solution, however it now appears that Devon County Council will not be reintroducing this service. Throughout the period the Unit has also been represented on the Joint Team Strategic Management Board.

In 2009-2010, improvements were made to visiting officer Lone worker practices. The visiting officers all received Personal Safety Training accredited by the Suzy Lamplugh Trust. A call back monitoring service (LookOut Call) was also provided for all the CAB visiting officers. Visiting Officers use their mobile phone to provide regular spoken updates describing their latest location throughout the day. They also input the length of time their appointment will last. This causes a timed countdown to begin. The timed countdown is reset as lone workers update their status throughout the day. If a countdown expires, the system phones the lone worker to check they are safe. If the lone worker fails to answer the call, the system enters an alert mode. When an alert is triggered the system calls nominated colleagues and replays them the latest message left by the lone worker. The system also features an Emergency Panic Alert facility. This enables the lone worker to instantly request assistance. The system has worked extremely well, with all visiting officers using it regularly and reporting it as a simple and effective system which provides them with increased personal safety.

In May 2009 Swansea Pension Service, due to other commitments, stopped providing lists of outcomes to benefit claims made by clients of the Joint Team, in cases where authority forms had been provided. Instead they required individual letters be sent for each claimant requesting specific information with an authority form attached and provide feedback by letter separately on each individual case. With 1625 benefits claimed in 2009 -2010 this has created a lot of extra work in the process of verifying outcomes and currently we are still experiencing problems in getting responses to our requests having only received a response in 48% of cases.

Service user feedback provided by way of responses to a monitoring form given to each service user at the home visit has remained excellent, as the following selection of comments indicates:

"Visiting service was very helpful"

"Really helpful lady who checked I was getting all the benefits I was entitled to"

"The assessor was extremely informative and helpful. She was very efficient and made the process easy"

"Exceptionally helpful and pleasant and answered all our questions with clear information"

"Helpful and approachable"

"Everything was well explained"

"Personal service which avoided having to fill in forms unaided"

"Excellent Service"

“Clear, patient and interested in my situation - you need her cloned”

“The Visiting officer gave her undivided attention to my mothers case and could not have been more helpful”

“Pleasant, approachable and efficient”

“Instant decision, copy printed for me, most impressive”

“Knowledgeable, polite and helped a lot”

In 2009 -2010 The Devon Joint Team delivered a financial assessment and benefit check service to 3253 Social Services service users in their own homes. 77% (2514) of these were visited within 15 days of the referral being received. A total of 975 households have been assisted to make 1625 claims. The verified outcomes of 332 cases has yielded **£728,490.60**. If the remaining 1293 met with similar success the estimated total would be **£3,551,388.70**.

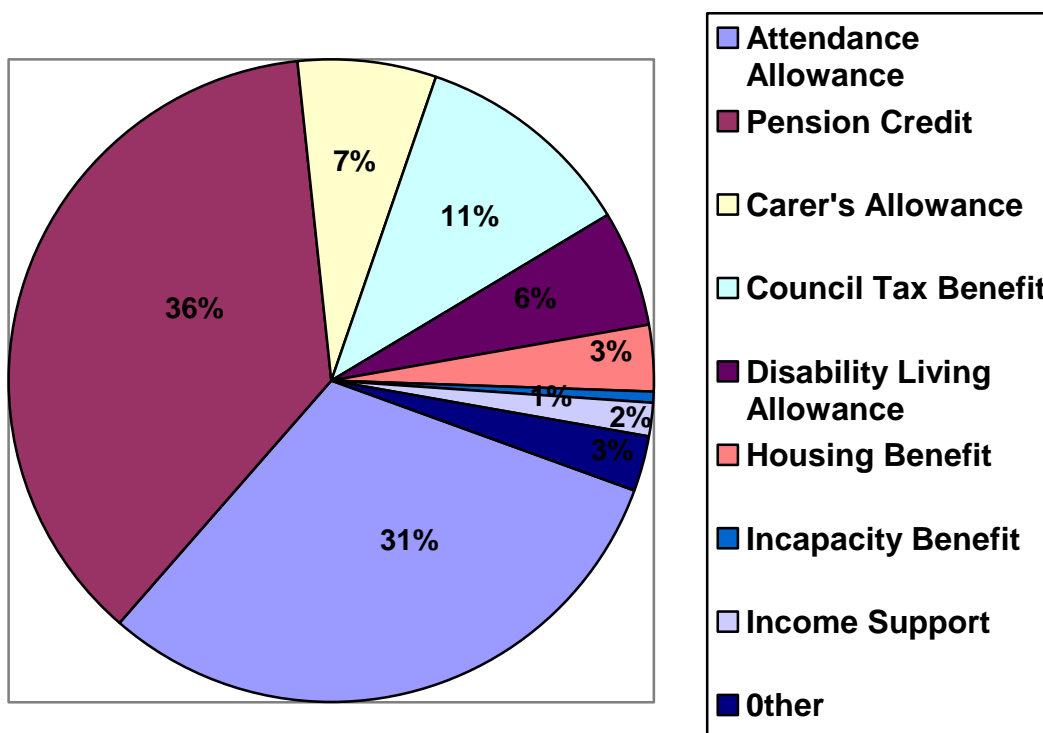
Finance and Benefits Joint Team Benefit Take-Up Analysis April 2009 - March 2010

In the 12 months April 09 - March 10 **1625** new or increased benefits were identified for **877** separate households.

Outcomes

Total	Outcome Not Known	Outcome Known	Benefit Awarded	No Award	No Claim	No Decision
1625	1293 (80%)	332 (20%)	200 (60%)	70 (21%)	23 (7%)	39 (12%)

Benefits Identified



Reasons Outcome Unknown

1293 cases do not have an outcome recorded:

736 = No result received

296 = No authority form signed

261 = Housing/Council Tax benefit claims

Benefit Awards

In 200 claims benefit was awarded:

Attendance Allowance: 111 claims (55.5%)

Pension Credit: 65 claims (32.5%)

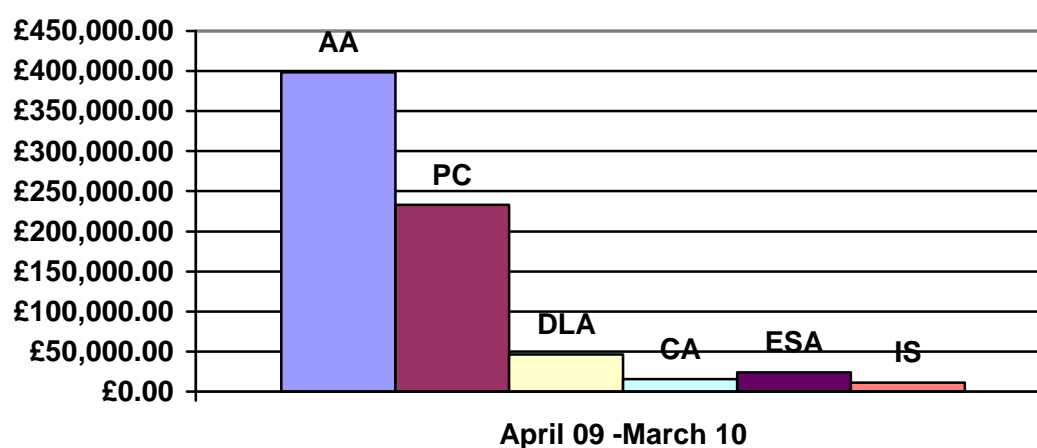
Carer's Allowance: 7 claims (3.5%)

Disability Living Allowance: 9 claims (4.5%)

Income Support: 4 claims (2%)

Employment Support Allowance: 4 claim (2%)

Benefit Award Totals



Benefit Type	Backdate Award	Weekly Award	Total Award (annualised)
Attendance Allowance	£133,265.70	£5,098.55	£398,390.30
Pension Credit	£90,573.02	£2,736.16	£232,853.34
Disability Living Allowance	£15,134.10	£604.20	£46,552.50
Carer's Allowance	£6,196.50	£183.23	£15,724.46
Employment Support Allowance	£7,364.80	£316.95	£23,846.20
Income Support	£3,433.00	£147.90	£11,123.80
Total All	£255,967.12	£9,086.99	£728,490.60

Section 6

TACKLING THE IMPACT OF THE ECONOMIC DOWNTURN 2009-2010

How to Boost your Income in Tough Times



Help for Businesses in Tough Times

In January 2009, due to the impact of the economic downturn, nationally, redundancies were being announced daily and there was some central government financial and other support for those sectors most affected. Where there were to be 20 or more redundancies in one company, the law required notification and Jobcentre Plus would then offer a range of services. In Devon, however, 99% of businesses employ fewer than 50 people. In North, East, Mid and West Devon the percentage of businesses with fewer than 4 employees is above both South West and national figures. The number of advice issues concerning Jobseekers Allowance and redundancy brought to Citizens Advice Bureaux in the South West rose by over 100% between April and December 2008.

The Weathering the Storm conference held by Devon County Council in February 2009 identified the need for financial advice for small businesses and their employees. With an economic downturn it was apparent that small businesses were under unprecedented pressure and in every case there was potential entitlement to help by way of new or revised Tax Credit and benefit entitlements, help with domestic rent and council tax charges for example. Devon Welfare Rights Unit was excellently situated to provide the entire target group with timely advice about entitlement to social security benefits and tax credits before decisions were made about the viability of a business or the feasibility for an employee to accept reduced hours or take voluntary redundancy.

In April 2010 Devon County Council made a decision to fund a 0.5 FTE Welfare Rights Officer post in Devon Welfare Rights Unit to enable a project to be set up for one year with the aim of providing a rapid response/specialist

support Income Maximisation service aimed at small business employees and employers as part of their response to the impact of the economic downturn. On results received by May 2010 an additional **£206,200** has been raised for individuals in Devon - of this, **£187,000** is sustainable long term annual income. This represented a return on the original investment of 6 to 1, a return which many small and medium size enterprises would like to emulate. In relation to the **92** clients from **85** households seen, **46** additional benefits were verified as secured through the campaign for **39%** of the clients. 56 clients were still awaiting decisions on claims, revisions or appeals for additional benefit or we have not been notified of the award.

The response to this campaign was largely from affected individuals, the majority of clients being self employed or employees facing reduction in working hours, redundancy and bankruptcy with very limited contact direct from small businesses.

more time than anticipated home visit service across rather than visits to groups businesses. The project, Task and Finish Group also with PLUSS providing 13 and Exeter to staff from



Financial Inclusion

Due to this, substantially was spent providing a Devon to see individuals of employees in small with agreement from the agreed to undertake work site visits in Barnstaple that organisation.

As well as service users, 20 local agencies (65 individuals) participated in basic benefits training delivered as part of the project.

The project provided evidence that strategically focused income maximisation campaigns have a valuable part to play in any anti poverty strategy, delivering sustainable benefits for individuals, the community and voluntary and statutory agencies involved. This would not have occurred to the extent it did in Devon without the provision of this initiative. There are valuable lessons learned in this initiative which can be used in discussion of a long-term strategy for income maximisation campaigns involving small businesses and self employed people that could deliver similar sustainable benefits to further individuals and communities across the whole of Devon.

The Tacking the Impact of Economic Downturn Project was successful in a variety of ways:

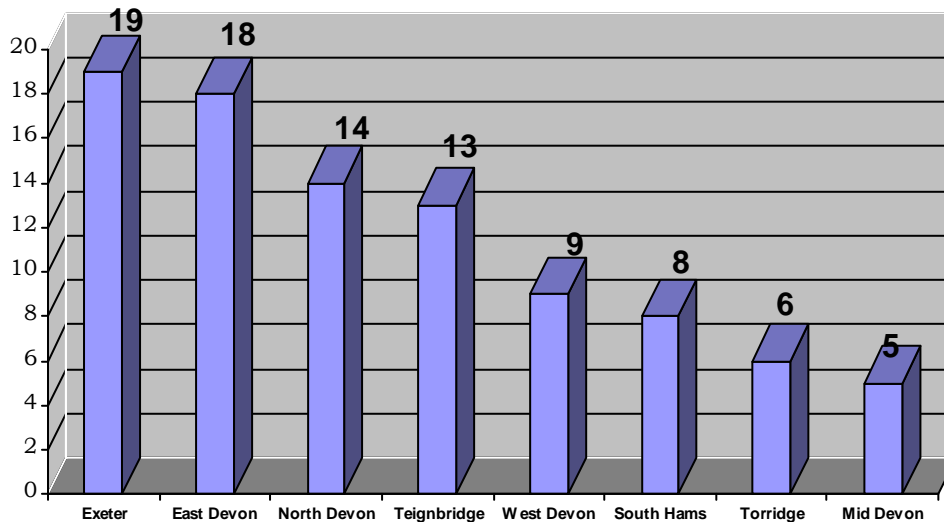
- The pre-campaign training was very well attended by workers from a wide range of local agencies.
- A higher than expected amount of benefit income was generated.
- Clients were appreciative of the service provided and it had a significant impact on their lives (see Appendix 4).

The experience of the Project also leads to the conclusions that:

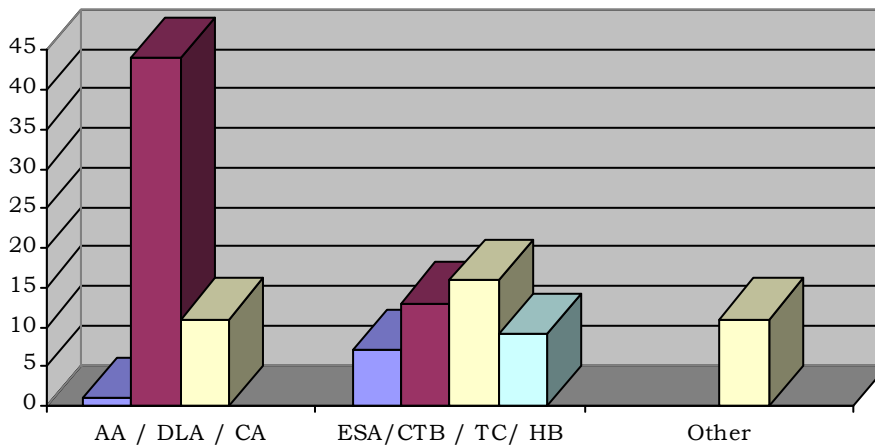
- A partnership or multi-agency approach is essential in order to facilitate access to free, independent welfare rights advice and assistance, especially when targeting new groups.

- The DWP should remove existing barriers to third sector intermediaries which currently impede an effective and timely resolution to many cases.
- Providing a variety of options for appointments (i.e. home visits or in the work place) enables access to the service for those who are most likely to need assistance in claiming benefits.
- The opportunities afforded by this project facilitated the beginnings of a useful dialog between advice provision organisations and employers in Devon. There are opportunities for further development in this area of work.
- In the light of predicted continuing economic difficulties it is important to demonstrate a commitment to supporting the sustainability of small business in Devon and the people who work in them. This project is an example of how that might be achieved.

Tackling the Economic Downturn Referrals by District 2009-2010



Tackling the Economic Downturn Casework by Type of Benefit 2009-2010



Section 7

MAKING WORK PAY

This project is funded through a Public Service Agreement and is a partnership initiative with Devon County Council and others. It is part of the Government's initiative to ensure that as many people as possible have the opportunity to work, including people with Learning Disabilities.

Devon Welfare Rights Unit's role within this project is to offer an independent, impartial and confidential benefits advice for customers and their families registered with Adult Community Services who have a Learning Disability and are aged between 18-30 years. The service is provided when work is being considered or offered, or at the annual review which ever comes soonest. Clients are referred to the Unit by Community Care or Specialist Employment Support Workers.

The advice service is based on maximising current entitlement and providing information on how income is affected by working. The adviser usually provides calculations for at least 3 different working scenarios to enable people to make informed choices about taking work. One of the purposes of the project is to counter one of the myths about people with Learning Disabilities taking work: that they can only ever be £20 per week better off.

The target for the project is that the Unit will have provided this service to 150 people within the target group by the end of March 2011. The work on the project began with 3 briefing sessions provided to Employment Support Workers across the county and we began taking referrals from February 2010. By the end of March 2010, the Unit had undertaken benefit checks for 8 clients. Potential additional entitlement was identified in 2 cases and all calculations provided showed that customers would be financially better off in work.

The Unit is looking forward to continuing with this project during 2010/2011.

Section 8

2GETHER PROJECT

Devon Welfare Rights Unit was commissioned by Early Years & Childcare Service (“EYCS” - Devon County Council) to work with them in relation to income maximisation amongst families in Devon and in particular in relation to the take up of Working Tax Credit and the childcare element within Working Tax Credit (NI 118).

It was agreed that Devon Welfare Rights Unit would

- a. provide benefits awareness training for 80 front line children’s centre staff and 12 EYCS staff, with a view to increasing staff confidence and capacity to support and signpost parents effectively
- b. produce publicity materials by way of a leaflet and poster promoting take up of Working Tax Credit, and a written article for media use
- c. present a briefing at 10 of the provider network meetings across the county
- d. provide face to face information, advice and support to 100 families referred by EYCS as part of the two-year old project (the “2gether Project” - a pilot providing childcare and other support for the families of two year olds in specified areas – children’s centres in Exeter, Barnstaple, Bideford, Ilfracombe and Newton Abbot)

All of the above activities were timetabled to be carried out between January and March of 2010 and, with the exception of referrals under d. above were completed within that timescale. In the event the number of referrals received during the period was lower than anticipated and that strand of the agreement was extended beyond the year end. At the time of writing the evaluation and assessment of outcomes for this work has not been completed.

Notwithstanding, the exercise clearly demonstrated the potential for benefits and tax credits advice within children’s centres to maximise the employment prospects of families even with young children, and further underlined Devon’s commitment to and recognition of the value of partnership working across sectors.