

Role of the Welfare Benefits Unit

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

Our specialist second-tier provision underpins the North Yorkshire and York advice sector ensuring that local residents are supported to navigate the complex welfare system, helping to maximise their income and reduce the impact of poverty, often at difficult points in their lives.

Our experienced advisers provide independent support through our:

- ✓ advice line
- ✓ publications
- ✓ training
- ✓ consultancy
- ✓ projects

Support with complex decisions to enable positive change

The welfare system can seem bewildering.

Even with the introduction of Universal Credit it can seem like there are a myriad of options, and indeed, the ongoing managed migration process often necessitates comparisons between entitlement to Universal Credit and the legacy system it replaces. Benefit claims are made for many different reasons, from relationship or health changes, the arrival of a child or simply checking to see what might be available when current income does not stretch far enough. Access to expert advice at key points ensures that clients can make informed choices.

Working in partnership with local organisations, our independent support – provided through our advice line, training, publications, consultancy and projects – brings expert advice and improved outcomes to clients and builds the confidence, skills and knowledge of local advisers.

“There was a Universal Credit case recently where you met with our advocate and wrote a great submission. I accompanied the client to the tribunal which was successful and he was delighted.”

CASE STUDIES

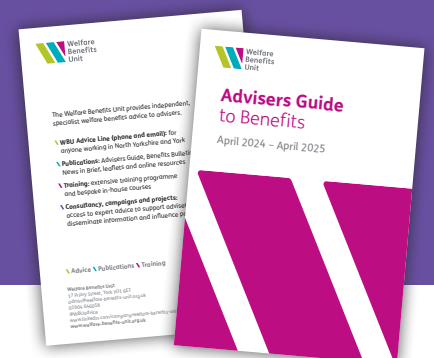
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advice line hours – accessed by more than 284 advisers across 72 organisations.
“Just to say that I couldn’t have done this job without you. You do an amazing job. I recently read a quote that fits what you do. ‘You are not a drop in the ocean, you are the ocean in a drop.’”



Training:
“As always, the course was excellently delivered and the facilitators knowledgeable and engaging.”

Advisers Guide:
“The advisers guide is indispensable especially when doing outreach work”



Foreword from the Chair

Welcome to our latest Annual Review.

The last year has seen the continued compound impact of the relatively high cost of living and many individuals and families still needing support to navigate through complexity of the welfare system, many for the first time. There was confirmation of the end of the Cost of Living Payments and the closure of tax credits by April 2025. The timetable for managed migration to Universal Credit continued to change, with WBU sharing updates with frontline partners. As we look forward to the year ahead, there will likely be further welfare measures brought by the new government.

As you'll see within this report, WBU has advised on nearly 1,200 cases through our Advice Line service, supporting over 2,300 benefit issues. Through our training programme we've reached advisors new and old locally and, increasingly so, from across the country, continuing to play a valued role in their professional development and ensuring they have access to the resources and knowledge they need. Our publications similarly have wide reach across the country and I'm proud that the team were able to support some national charities to ensure the accuracy of their own published advice for their communities.

I'm thankful to the staff and trustee team within the Welfare Benefits Unit in continuing to use their combined skills and significant expertise so energetically to sustain our work to support frontline client-facing advisors across the community and ensure that accurate advice and guidance is available to those eligible for welfare benefits.

Our long-term partnership with North Yorkshire Council was extended for another year and we look forward to engaging with them in a tender process to sustain this relationship and local services. We are grateful to the Lloyds Bank Foundation for England & Wales for investing in our exciting new project with the University of York, City of York Council, Citizens Advice York, Peasholme Charity, Age UK York and York Foodbank for forthcoming work and research in the 2024/25 financial year and to Two Ridings Community Foundation and the Cranfield Trust in supporting our organisational development. We continue to work closely with City of York Council in delivering our core service for York and were grateful to have additional grant funding from them to continue our AdviceExtra project.

This year we also said goodbye to our former Chief Executive, Liz Wilson, who moved back to frontline advice. We were pleased to welcome our new Chief Executive Tom Meares, and Alison Hodgson who joins us in a new advice and training role in the team.

We look forward to the year ahead as we continue to support and underpin frontline advice and so reduce household poverty and promote income maximisation throughout our activities.



Paul Murphy
Chair of the Trustee Board

Our Services

Our expert advisers provide navigation through a complex benefits system.

“Such a useful and informative service.”

Welfare Benefits Unit provides:

- ✓ Accurate advice, training and publications about an increasingly complex benefit system.
- ✓ A professional and quality assured service to ensure that specialist advice can be accessed through local support agencies and cascaded to a wide number of individuals.
- ✓ Information to promote the take-up of benefits and awareness of entitlement.
- ✓ A focal point for welfare rights work across North Yorkshire and York offering networking opportunities, updating and information.
- ✓ Social policy action to influence local and national decision-making, working with partners to promote claimants' rights.

“I always receive good advice, everyone is friendly and helpful, it's great to have access to such a great service. WBU training is also really useful and always well presented by knowledgeable workers.”

Advice Line

We work in partnership with organisations to ensure that they can offer in-depth, knowledgeable support, enabling clients to make informed choices to sustain or improve their financial security and mitigate the impact of poverty. Access to advice, often at times of unexpected change, distress and uncertainty, ensures that positive choices can be made.

Further, when answering queries on the Advice Line, our advisers regularly identify missing entitlement and incorrect assessments. The specialist advice we provide ensures that when a challenge to a benefit decision is needed, both clients and their frontline advisers are supported to provide effective arguments; utilising legislation, guidance and case law as appropriate.

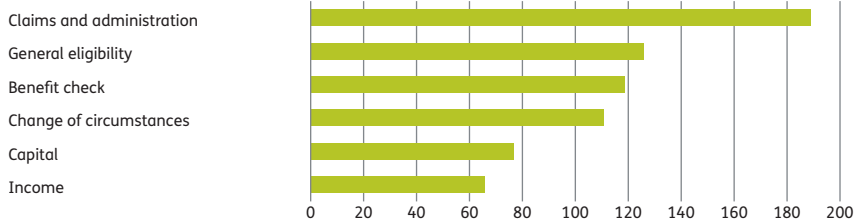
Over half of queries included Universal Credit and we expect this to continue to increase as the government moves forward with migration from legacy benefits. Nearly one-fifth of queries were for families with children and seven in ten related to households with at least one disabled person.

“Thank you so much for this. It’s a wonderful service you provide! What you say makes perfect sense and I shall use the references in my write-up.”

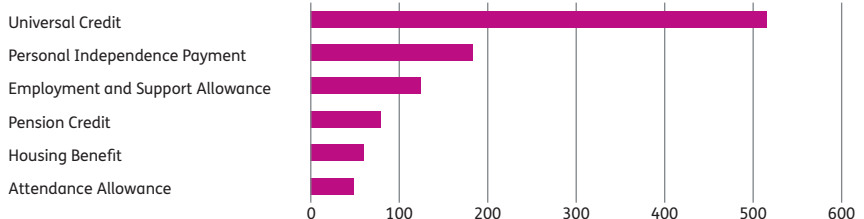
WBU continued to receive funding from Improving Finance, Improving Lives (CYC Financial Inclusion Steering Group) to run the AdviceExtra project. This had two main strands: follow-up and in-depth advice provision and briefings on Universal Credit migration. This funding, continuing in 2024/25, allows us to build on our core service and provide a broader range of support to York advisers and agencies.



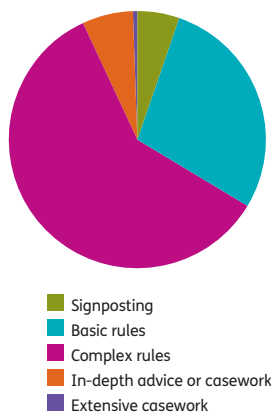
Top six issues



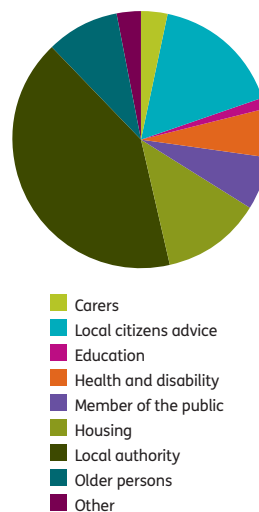
Top six benefits



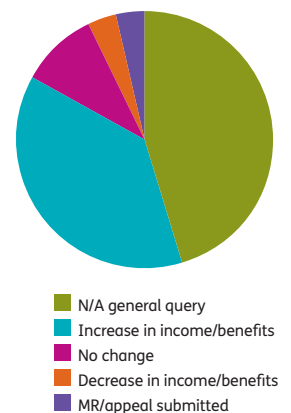
Complexity



Organisation



Outcomes





Publications

The WBU Advisers Guide to Benefits is a concise annual publication which provides an overview of welfare benefits, including eligibility and calculation. It is written for people who give information and advice, with its clear format ideal for accuracy and quick reference. It is an invaluable resource, currently used across a wide range of statutory and voluntary organisations, including advice, community, health, housing and probation services. It is supplemented by our Rates Card and disability and State Pension age leaflets for use with members of the public. In 2023/24 we sent out over 5,600 items to over 350 organisations and individuals.

“Information is accurate and informative and easy to understand.”

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

“The advisers guide is indispensable especially when doing outreach work, it is very portable yet contains all the basic rules and rates which I can then easily refer to when meeting clients.”

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



Training

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

“This course was amazing and the trainer was fantastic. There was so much information, useful activities and real life examples. Highly recommend it to everyone I speak to!”

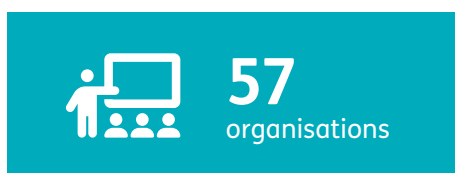
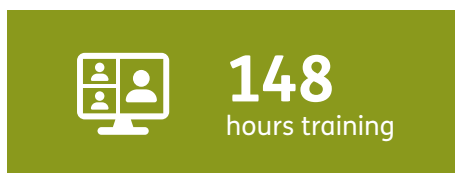
Our training programme provides for advisers at all stages of advice-giving, from introductory courses for those just starting out to experienced level ones for those looking to expand or refresh their knowledge. Our trainers are all qualified, experienced and dedicated to high quality provision, responding to high demand and ongoing benefit changes.

Online provision attracts attendees from a wide geographical area.

“It is well organised and a good amount of information provided. The trainer explained well and was approachable for you to ask questions.”

Our Courses

- \ Introduction to benefits
- \ Universal Credit
 - \ Housing costs
 - \ Introduction
 - \ Migration
 - \ Work
- \ Benefits Overview
- \ Benefits for Families with Children
- \ Benefits for People with Mental Health Difficulties
- \ How Work Affects Sickness and Disability Benefits



Forum meetings, social policy and collaborative working

The Welfare Benefits Unit supports partnership working, putting advisers in touch with each other and relevant organisations through events such as our Forum meetings.

“[It is] good to hear other people’s views. Updates are always great clear and relatable.”

Response to consultations enables us to present the experience of claimants based on the cases we receive and our specialist knowledge of the benefit system. We submitted a response to the Work Capability Assessment activities and descriptors consultation, responded to the Administrative Justice Council’s call for evidence about the impact of accessing justice on those with mental ill health and then participated in their focus group on the same issue. WBU’s training lead was also interviewed on behalf of the Money and Pensions Service as part of the Money Guidance Training and Qualification Landscape Research project.


WBU collaborates with a number of consultancy clients, supporting organisations with copy and technical writing, recruitment, training and supervision of staff and through file review, supporting quality assurance.

“The WBU team have been crucial in supporting us to deliver our Advice Service, we would not have been able to run our service with confidence without them. ... Having such an experienced, patient, impartial voice in dedicated 1 on 1 time has been invaluable.”

WBU experience also informs the work we do within regional networks and involvement in national forums, such as the Selby Poverty Action meeting and sector conferences.


Biannual forum meetings

- \ Specialist briefings: Public Law Project
- \ Budget and benefits updating
- \ Information sharing
- \ 2 meetings
- \ 46 attendees



A disabled claimant had been found to have limited capability for work only and had an upcoming appeal to challenge the decision.

WBU’s detailed notes, prepared at short notice for the advocate led to the claimant successfully being found to have both limited capability for work and work-related activity. This meant that they were no longer required to participate in work-related activity and had an additional element added to their Universal Credit award.



A pensioner who was the victim of a scammer sold their house to provide money to the scammer.

The enquirer was concerned that the client could be caught by the deprivation of capital rules and therefore be unable to claim means-tested benefits. We advised that as much information as possible should be provided alongside the application for Pension Credit, and that given that the client has been groomed, and the police were involved, it was very unlikely that they would be found to have deprived themselves of capital. The enquirer explained the situation to the Pension Service, who outlined the procedure to expedite the claim on the grounds of financial hardship.

Finances

The Welfare Benefits Unit is supported by North Yorkshire Council and City of York Council. Additional revenue raised through training, publication sales, and consultancy services are essential to ensure continued, quality assured service provision.

Specialist benefits advice supports the work of staff and volunteers in the statutory and voluntary sector, enhancing the lives of clients. Funding recognises the importance of supporting people to make informed decisions, ensuring financial stability and promoting wellbeing.

Additional funding enables us to enhance our service offer.

We received funding from City of York's Financial Inclusion Steering Group to fund Advice Extra, offering in-depth support and Universal Credit briefings. We also received essential funding from JRHT York Committee supporting adviser costs and IT changes.

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


Trustee Board & Staff 2023–24

Trustee Board

Paul Murphy: Chair
Richard Bridge: Treasurer
Prof Peter Ball
Helen Edwards
Prof Charlotte O'Brien
Dr Katie Pybus
Mark Taylor
Nicola Welch


Staff

Liz Wilson: Chief Executive (until June 2023)
Tom Meares: Chief Executive (from July 2023)
Jules Dymond: Advice Service Manager
Kathryn Ayres: Office Coordinator
Andrew Davies: Welfare Rights Adviser
Kate Fincham: Welfare Rights Adviser
Alison Hodgson: Welfare Rights Adviser (from September 2023)
Jenny Shaw: Welfare Rights Adviser
Kathryn Wordsworth: Welfare Rights Adviser



A disabled client had the offer of work and wanted to understand how his Universal Credit would be impacted if he took the job. We were able to calculate the impact of the client's potential work on their Universal Credit award so that they could make an informed decision about whether to take up the offer. We then identified that the client's new earnings were not being taken into account in his Universal

Credit award and he was accruing an overpayment which was causing the client some anxiety. We advised on steps to remedy this and were also able to give advance notice that there would be two months each year where he would receive five weeks' pay instead of four and Universal Credit would be reduced. The client was able to plan ahead and budget accordingly.



A bereaved client with twins in education became eligible for Widowed Parent's Allowance following a change in the regulations. While considering making the claim, they also received their migration notice to move from tax credits to Universal Credit. Our advice utilised the regulations and DWP's decision maker's guide to identify a path to maximise income on an ongoing basis by timing each claim and ensuring all deadlines would be met.

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