

Chief Executive's Report

Demand for our service has always been consistently high, but this year has seen a huge increase in our workload. We received 552 referrals for Tribunal representation alone in this year, which is just in excess of a 21% increase when compared to 2008/09.

The introduction of Employment and Support Allowance (ESA) and a tougher benefits regime for people who are incapable of work has had a direct effect on the number of appeals that we have had referred to us. Citizens Advice Bureaux and other front line agencies have also reported a huge increase in demand from clients seeking advice about benefit entitlement when their claims have been refused.

Due to the impact of the recession, more people are claiming benefits and consequently there are more appeals to deal with, coupled with a continual tightening of the criteria related to the welfare to work scheme. Our countywide representation and appeals service is the only such service of its type in Warwickshire and as such has faced considerable pressure this year due to the volume of work received.

Our benefits take-up work continues to focus on deprived areas of the county and in particular our work in Children's Centres in Nuneaton and Bedworth is helping to contribute to key Local Area Agreement Indicators and the Narrowing the Gap agenda. By improving the take-up of in-work benefits, particularly Tax Credits (18% of total take-up enquiries) and Housing Benefit and Council Tax Benefits (over 20% of all take-up enquiries) we are helping to contribute to LAA targets by helping to reduce the number of people on out of work benefits and the proportion of children who live in families in receipt of out of work benefits. Indirectly our training, publications, advice line and information services also help to contribute to these targets by building capacity and knowledge amongst front line organisations.

There will inevitably continue to be an increased demand for WWRAS services due to the Government's ambitious aims of cutting the welfare state bill and this highlights the vital role that our service will continue to play in Warwickshire going forward in the years ahead. The benefits system has become even more complex and draconian in parts and coupled with the biggest financial recession since the 1930's has meant that WWRAS together with our partners in the advice sector will have a bigger role than ever to play in delivering both specialist and generalist advice services to the most vulnerable in society across the county.

The new coalition Government has also recently announced several key changes to the welfare state, with a more unified simplified benefits system proposed and an increased emphasis on a revised welfare to work programme. In addition, the migration of claimants in receipt of Incapacity Benefit onto ESA and the proposal to subject Disability Living Allowance claimants to stricter medical tests from 2013/14 will add to the increasing workload of all front line advice agencies in Warwickshire and will undoubtedly increase our workload as we expect to see more clients having their benefits stopped or initial claims refused. The revised test for DLA claimants will be similar to the points based Work Capability Assessment for ESA and the DWP expect a 20% reduction in caseload and expenditure after the three year roll out period. We can therefore expect a significant proportion of those claimants who become disentitled to appeal against these decisions, which will in turn increase demand for our service.

It is in this context that we face our biggest funding challenges in recent years, with public sector spending cuts looming and this could have dire consequences for advice agencies through funding and service reductions, as we continue to try and serve the most vulnerable in society; the very people who will be worst hit by the Government's budget cuts. We continue to enjoy a strong and supportive relationship with our main funders Warwickshire County Council and we are part of an effective network of advice providers through Legal Advice Warwickshire (LAW). Partnership work will continue to be of vital importance to WWRAS in order to develop strong links at the right level that will enable the organisation to sustain existing services and take advantage of funding opportunities when they arise.

We firmly believe and indeed have demonstrated over the past 24 years that we provide vital, cost effective services to the benefit of the poorest members of our society. Whilst apprehensive about future funding, we also remain confident that by working with our funders and other stakeholders we can continue to shape and design methods of service delivery that will meet the challenges that lie ahead in order that we can still provide a range of services that are high quality, value for money and with a core aim of combating poverty in Warwickshire.

WWRAS's income rose by just over 7% in 2009/10 to £400,040 and a healthy surplus was generated at the end of the financial year. This surplus was transferred into our designated fund to cover ongoing liabilities to the Local Government Pension scheme, which some staff are members of. Our core funding from WCC has been awarded until 31/3/2012 without any inflationary increase being applied. However, as is the case with all voluntary sector agencies we are conscious of the challenges that lie ahead and in addition Warwickshire County Council plans to commission a

single advice services contract and this will bring challenges to all advice agencies trying to deliver more for less. It will clearly be important to expand and diversify our funding sources in order to protect against the impending restrictions in Local Authority spending. A copy of WWRAS' full accounts for 2009/10 is available on request.

I would like to thank our funders, for their continued support, encouragement and financial investment which has enabled us to continue delivering a high quality service to the residents of Warwickshire. WWRAS is funded to increase awareness of Social Security benefits amongst staff working for WCC and related agencies and to raise the level of benefits claimed in Warwickshire. We have successfully done this to the tune of just over £2.3 million in 2009/10 financial year. This means that for every £1 of funding that we receive we raise nearly 8 times this amount in benefits for clients, which in turn is spent in the local economy and helps to reduce the strain on other statutory services.

Finally, but certainly not last in rank of importance, I would like to thank all staff and Trustees for the invaluable work that you continue to undertake on behalf of the organisation, which has yielded such impressive results for clients and which contributes significantly to making this organisation a hugely effective player in helping to tackle poverty in all its forms across Warwickshire.

**Mark Stanyer,
Chief Executive, WWRAS**

October 2010

HEADLINE STATISTICS 2009/10

*Over 2200 claimants advised/represented
Over £2.3 million in benefits raised for clients*

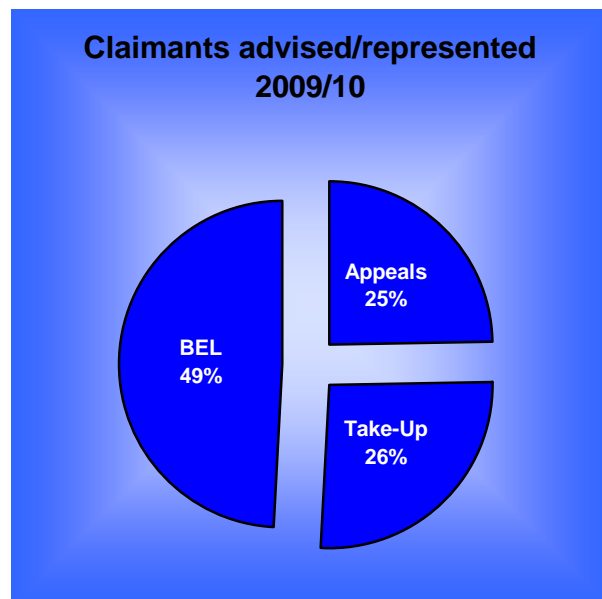
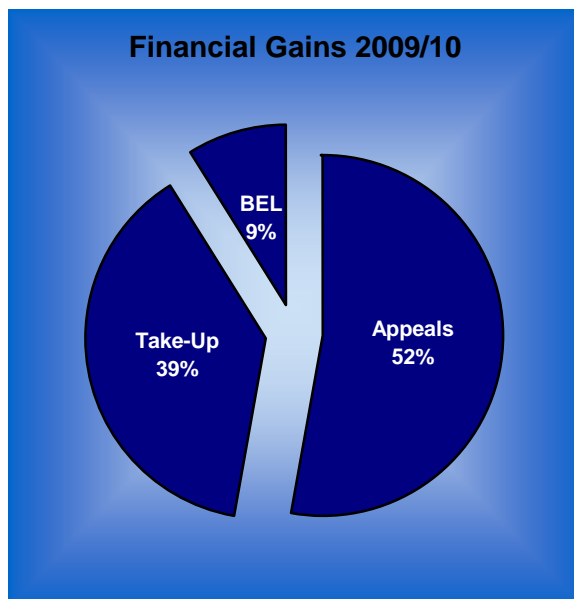
Financial Gains:

| | |
|---------------|-------------------------|
| | £ |
| Appeals: | 1,240,000 |
| Take-Up: | 907,559 |
| BEL: | <u>207,000</u> |
| TOTAL: | <u>2,354,559</u> |

Clients advised/represented:

| | |
|---------------|--------------------|
| Appeals: | 552 |
| Take Up: | 581 |
| BEL: | <u>1100</u> |
| TOTAL: | <u>2233</u> |

Breakdown of Income



BENEFITS ENQUIRY LINE

This is our telephone helpline for WCC staff and staff in other statutory and voluntary agencies across the county. We offer expert advice to help front line staff who are not benefit experts, to identify extra entitlements for their clients, and to advise on often complex issues.

15 hours per week availability

We have maintained the helpline between 10am and 1pm each weekday morning as well as recording additional queries which come in through the main switchboard, re-directing callers to the BEL or other agencies as appropriate. Calls are fairly evenly spread across each day of the week, with slightly higher volumes on Tuesdays and Thursdays.

Number of enquiries per year

We dealt with 1,100 enquiries a modest 4% increase when compared with the previous year, with calls from a wide variety of agencies. Our database records all caller agencies and this is analysed to see if further awareness raising and promotion of the service is required.

There is a varied range of calls from the different parts of the county. Warwick District agencies as ever, make significant use of this service (27% of calls) as does Nuneaton & Bedworth (22%). North Warwickshire as the smallest area makes up the least at 8.5% with Rugby at 17% and Stratford 15%. Only 1.5% of calls were from outside Warwickshire and 2% were uncategorised. The calls breakdown from each District is broadly similar to that of last year.

Breakdown of users

26.5% of calls come from WCC staff and their Adult Health colleagues. Two thirds of these are Adult (as opposed to Children's) Services. These figures are similar to last year, although here has been a slight drop in calls from WCC staff.

Nearly 31% of all calls to the Enquiry Line come from CABx, which represents a 10% increase compared to last year and 33.5% are from other (mainly voluntary sector agencies) most of which are funded by WCC. The number of calls from members of the public directly accessing our helpline (8%) has almost halved compared to last year and this shows that the work we have done with colleagues around the county informing them how to access our service has been paying off.

Type of enquiry

We record the type of client being advised by broad category. 6.5% were pensioners, 11% children and young people, 54% were young disabled people (with a preponderance of physical disability in the ratio of 3:2). The remainder of calls related to non-disabled clients including low income families.

The calls often involve complex legal issues, including the interaction between social security legislation and that binding the County Council.

Gains for clients

The majority of calls still relate to disability and ill-health benefits and the associated means tested benefits which clients can claim. Of particular note last year was the number of calls about the replacement for Incapacity Benefit, Employment and Support Allowance, making up 15% of all benefit

enquiries. This, together with Disability Living Allowance enquiries make up the most frequently asked about benefits. We record all cases where we have helped to identify and advise on additional benefit claims and our work has helped to identify £207,000 in unclaimed benefits which callers have been able to pursue.

User feedback

We send out Agency User Feedback surveys at various intervals throughout the year. Of those responding, 96% had heard of the BEL and 79% had used it. The remainder all said they would use it in the future. 68% of those whom had used the service found it very useful with the remainder finding it useful. No one responding said that they had not found the enquiry line to be useful

TRAINING REPORT

Our training function is split into two broad areas: a fixed annual Training Programme and a series of training sessions arranged as requested during the year, which we refer to as 'Training in the Community'.

Main Training Programme

25 training sessions were promoted in this period, with two not going ahead due to insufficient numbers. Demand for certain training courses was so high that they were presented to individual organisations on 5 occasions.

Always keen to show innovation, we introduced a different sort of training event this year, which we branded as '*Morning Tasters*'. These were short sessions, focussing on a single subject, combining a 'special interest' topic without the need to be out of the office for a whole day, or half a day.

We did such sessions on: 'Temporary and Respite Care'; 'Council Tax Discounts and Disability Reductions', and 'Pregnancy and Benefits'.

We also transplanted and updated a course developed for the 'Respect Yourself' campaign onto our main Training Programme: 'Young Parents and Benefits'

Huge Range of Courses

Our Training Programme demonstrates the diversity of courses which we can provide; in this year alone we covered 19 separate topics.

The full list of courses provided is as follows:

TRAINING PROGRAMME

| | | |
|-------|----|--|
| April | 23 | THE BENEFITS SYSTEM & HOW IT WORKS |
| | 30 | GRANTS AND LOANS: TACKLING THE SOCIAL FUND |
| May | 14 | THE BENEFITS SYSTEM & HOW IT WORKS |
| | 14 | UPDATING |
| | 14 | THE BENEFITS SYSTEM & HOW IT WORKS |
| | 20 | UPDATING |
| | 21 | UPDATING |
| | 21 | UPDATING SEMINAR (am & pm) [2] |
| June | 11 | PENSION <i>PLUS</i> |
| | 18 | TOP-UPS FOR UNDER 60'S |
| | 25 | HOUSING BENEFIT |
| July | 09 | IN WORK BENEFITS FOR THE DISABLED |
| | 16 | YOUNG PARENTS AND BENEFITS |
| Sept | 10 | LEARNING DISABILITY AND BENEFITS |
| | 17 | BENEFITS & MENTAL HEALTH |
| | 24 | BENEFITS FOR CHILDREN WITH A DISABILITY |
| Oct | 08 | THE BENEFIT SYSTEM AND HOW IT WORKS |
| | 22 | DISABLED, CARERS AND BENEFITS [BASIC] |
| Nov | 12 | DLA (CARE) FORM FILLING FOR ADULTS |
| | 26 | INCAPACITY FOR WORK AND BENEFITS |
| Feb | 25 | PENSION CREDIT – THE BASICS |
| Mar | 04 | TEMPORARY AND RESPITE CARE |
| | 09 | CT DISCOUNTS AND DISABILITY REDUCTIONS |
| | 25 | PREGNANCY AND BENEFITS |

WWRAS Training in the Community

WWRAS went 'out and about' to give 23 of these locally-based presentations, to 14 different organisations and in a myriad of locations.

The sessions varied from short one hour talks, to four day courses covering the full gamut of benefits for a particular client group, which amply illustrates the great flexibility of Warwickshire Welfare Rights Advice Service to meet a much varied demand.

As ever, such presentations often act as a 'testing ground' for subjects that can be transferred to a wider audience on our main training programme.

In addition, this year's sessions generated several new publications which have been added to our library of materials freely available on our website, and include leaflets that the general public can access, plus more detailed guidance for advisers.

Bookings

Increasingly, bookings are made via our website, and demand remains healthy. A total of 586 people attended our training, with an overall attendance rate for WCC staff of 52%, exceeding our service level agreement requirements.

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.

The 'on the day' evaluation asks about the venue, the course materials, joining instructions, and most importantly the effectiveness of the presentation. Universally feedback is positive, with an 87% 'satisfaction score' for the quality of presentation, and 96% of attendees feeling the course was pitched at the right level for their needs. 99% found the joining instructions clear and helpful, and 98% characterised the venue as good. When separate comments were made on the forms, 77% of these comments were positive about the training or the venue.

In addition a survey of all our services carried out with agencies found that 72% had attended WWRAS training with a high level of satisfaction.

INFORMATION

Benefits Bulletin and Benefit Rates items

Our annual Benefit Rates posters and leaflets are still popular and these are one of the items most downloaded from our website, and they are sent to all WCC teams as well as many other local agencies.

4 issues of the Bulletin have been produced and distributed to raise awareness of topical benefit issues and, highlight recent and upcoming changes. Just over 7,500 copies of the Bulletins were widely distributed during the last year, to all WCC teams and others, thus also promoting our services.

Publications regularly updated

All of our current publications were checked for accuracy and up to date content for the start of the financial year and there is a rolling programme of updating these throughout the year. There was a significant update in March 2010 to all leaflets and publications to reflect the change to pension age from 60-65 for women between 2010-2020. This has meant that every publication had to be reviewed, and many required changes as did most training packs. It is essential that items are maintained regularly as they are kept on the website and very widely used and this is an ongoing priority.

Number of new items

In addition to the updating of all publications in October and March, and in response to a request from the Family Information Service (FIS), we produced two new benefit leaflets: for under 16's who are pregnant or had just given birth; and a Pregnancy, Young Parents and Benefits Guide (a third version, combining the two, was printed under a joint logo with FIS). Both are now on our Publications List.

In addition, at the request of Warwickshire County Council Adult Services Department, we produced a "Continuing Healthcare and Benefits" leaflet. Other new leaflets produced during the year were "tariff income and benefits" and a leaflet advising people of their appeal rights if refused Employment and Support Allowance.

Website Use More Popular Than Ever

Our website has proved extremely popular this year and we have had a record number of visitors. There were 34,541 visits to the site which represents a massive 287% increase compared with last year's visits and users looked at 75,419 pages, which is a similarly impressive increase of 262% compared with last year's figures! The site was particularly well used across the year, especially in the last six months of the year when we produced new leaflets and added these to the site.

Users of our website have downloaded 13,999 of our information items, with our benefit rates items, publications lists, local contacts and residential care leaflets still being the most frequently used. Users also downloaded

other WWRAS documents, for example our annual report, training and referral forms.

Information Leaflets and Factsheets

As well as those items downloaded via our website, we have also distributed 11,401 leaflets and factsheets this year. This figure is a combination of our quarterly bulletin mail out and orders for specific publications. Leaflets are also used at promotional events. We also mailed out copies of our Training Programme as well as advertising it on our website.

User feedback

Our survey of agency users showed that 93% of respondents knew about our publications and 72% had used them. 71% of agencies surveyed, were aware of our website and 46% of them had used it, compared with 31% in the previous year, which does correspond with the massive spike in our website use this year. Nobody surveyed said that they had not found our information to be of use.

APPEALS CASEWORK

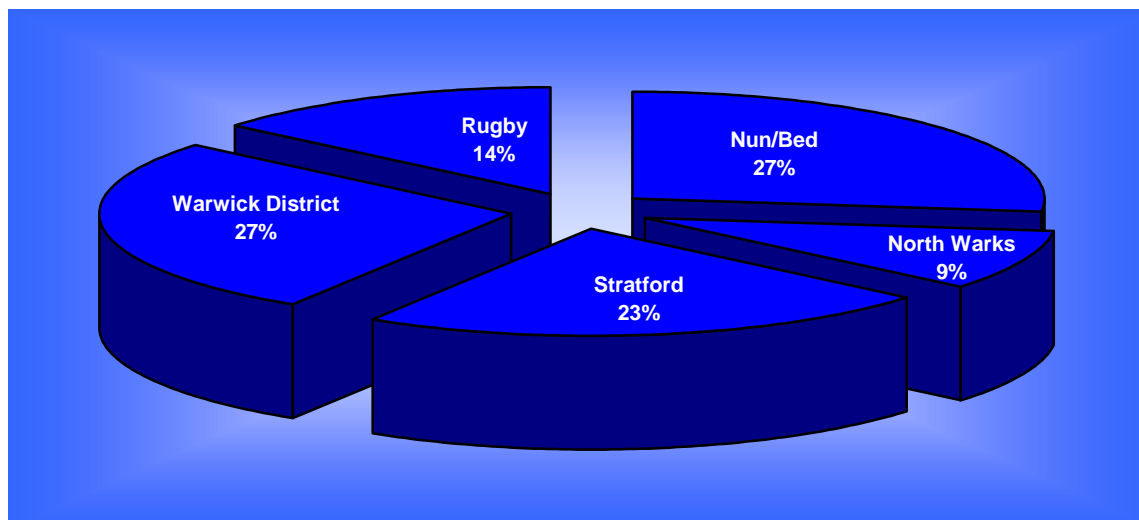
A Vital Service for Warwickshire

Demand for this service has been excessively high during the past year. We have taken 552 referrals which is significantly higher than last year. It has to be said that this number of referrals is unsustainable in the longer term, as we have had to re-direct resources from some other areas of our service in order to manage this. The introduction of Employment and Support Allowance and a tougher benefits regime for people who are incapable of work has started to have a direct effect on the number of appeals that we have had referred to us. In addition, due to the impact of the recession, more people are claiming benefits and consequently there are more appeals to deal with.

As the Appeals Service have experienced significant delays in listing cases this has meant that to an extent we have managed to take on these referrals but once the cases in our system start to be listed at quicker speeds we will need to reduce the number of referrals that we take on to more manageable levels in order to be able to deal with these cases. We have introduced a different system and methods of managing appeal referrals, which hopefully will enable us to deal with more manageable levels of cases.

We need to provide safe working levels for staff and the WWRAS management team, together with the Trustee Board are committed to ensuring safe caseload levels for staff, whilst also conscious of the need to provide, this service, (which is the only one of its kind in the county) to the most deprived residents in Warwickshire.

The spread of referrals coming from each area was:



52% came from CABx, 14% were self-referrals, 6% from WCC staff and 28% from other agencies in particular disability groups and social housing organisations.

Tribunal Success Rate Increases

In 2009/10, 481 appeal cases were closed, which is a 15% increase in our clearance rate compared to the previous year.

- 21% of these cases were successfully revised before hearing.
- 199 cases went to a full hearing and of these 70% were successful, which is an increase of 9% when compared to last year.
- A further 172 appeals were withdrawn on our advice or because the client chose not to pursue their appeal.

We have done a lot of work with local agencies over the past year and have changed our referral forms to try and ensure a better quality of referral. Despite the high percentage of appeals that were withdrawn, or which the client decided not to pursue, this is still a very useful and highly valued part of our service and many clients appreciate the impartial advice to help them decide whether or not to proceed with their appeal.

Amount of benefits raised

Financial gains for clients from appeal referrals this year, amount to **£1,240,000**. We attended more Tribunal hearings than last year and our success rate increased by just over 9%. This figure actually exceeds last year's amount by just over £142,500. Unfortunately last year's financial gain figure for appeals work was incorrect and the total gains should have read £1,097,427.40 instead of the quoted £2,347,927.

It is important to note, however, that all results quoted are a significant underestimate of actual gains.

Feedback from users

We sent out 83 client feedback forms this year. Of 35 respondents, 28 found our advice to be very clear and either very easy or easy to understand. Only 4 respondents did not find it easy to understand our advice.

28 respondents said that we kept them well informed of progress on their case, with 4 saying that we did not. 29 respondents were either very satisfied or satisfied with the overall level of service with 4 not being satisfied.

We monitor feedback carefully for levels of satisfaction and if clients are not happy with the service received they will be contacted and invited to use our complaints procedure if the matter cannot be dealt with informally. We only received 3 complaints from clients last year, none of which were upheld when investigated fully.

CASE STUDY

In August 2009 a woman was referred to us for assistance, having been declared fit for work by the DWP. She had suffered a breakdown of her mental health early in 2009 following an unexpected and traumatic separation from her long-time partner. She was experiencing severe depression and anxiety, and was unable to cope with daily life.

She had initially been awarded Employment and Support Allowance (ESA) by the Department for Work and Pensions (DWP) on the basis of her medical certificates provided by her own GP, which stated that she was not fit for work due to depression and anxiety. However, in July 2009 she had been called for assessment by the DWP's medical services. This was to check if the claimant's difficulties did indeed render her unable to work. The assessment would look at the difficulties her mental illness caused in areas such as concentration, motivation, coping with changes to routine etc. Points would be awarded depending on the degree of difficulty the claimant had and she needed to score at least 15 points to be accepted as unable to work and thereby continue to receive ESA.

The assessment was carried out in July 2009 by a Registered Nurse on behalf of the DWP. The assessment lasted 15 minutes, and the resulting report stated that the claimant had 'no problems' in any of the mental health areas being assessed. The claimant was notified that her benefit was to stop and she appealed, supported by continuing medical certificates from her GP. It was at this point that the appellant was referred to WWRAS.

We reviewed all the evidence, talked at length to the appellant and obtained evidence from Mental Health Services and from the appellant's friend, to confirm the difficulties the appellant had. We then prepared a written submission for the appeal Tribunal. The appeal was heard some 11 months later by the independent Appeal Tribunal, consisting of a legally qualified Judge and a doctor.

The Tribunal awarded the appellant 33 points, recognising the difficulty she had in 5 different areas including inability to go out unaccompanied due to anxiety, inability to cope with changes to her routine due to anxiety, and inability to manage daily tasks due to poor motivation and concentration.

The appellant's ESA was therefore reinstated and arrears of £1,100 paid.

Rachel Wilcox (Appeals Worker)

TAKE-UP

Number of campaigns done

1. Work with Fairer Charging clients

The AHCS Fairer Charging team offer advice to clients on entitlement to benefits as part of the assessment process. They can also help with claims. However where the client wishes to apply for a higher rate of benefit there is a risk involved and we have an agreement that these cases can be referred to our specialist staff for advice.

This year we had 74 referrals with 50 cases resolved and benefit gains of **£157,688** for clients. Three clients died or chose not to pursue applications and 25 were advised that an application would not be appropriate whilst 45 received extra benefits. We also helped three clients to appeal against adverse benefits decisions.

Much of this extra benefits income adds to the chargeable income available to the client so that they can purchase essential care and support services.

2 Benefit checks for Deaf Service users

We dealt with 10 referrals for help with benefit claims this year from the Deaf Services team. The work is mainly with BSL users who cannot easily access advice elsewhere and we work through a BSL interpreter to advise and help with claims.

Obtaining outcomes for these cases tends to take more time due to communication difficulties, but of the cases resolved 3 clients saw gains that would enable them to either purchase key services or help to manage their finances more effectively. 6 clients either did not respond or were not entitled to any further benefits and one client's request for an increase in benefits did not lead to any change in entitlement. Total gains in 2009/10 for this client group were **£17,620**.

User feedback

We do not advertise this take-up service but instead target particular benefits, client groups or areas upon referral from (a) Finance Assessments and Benefits Advice and (b) the Deaf Services Team. Despite this, over half of the 96 respondents knew of this service and 8 had worked with us on campaigns. 32 were keen to do so in future!

OTHER WORK UNDERTAKEN IN 2009/10

- We continue to be actively involved in the Voluntary Sector forums for both Older People's services and Children, Young People and Families.
- I attend the Voluntary Sector Older Peoples Network and represent them on the Healthier communities and Older People's Board.
- I also sit on the Child Poverty Strategy Implementation Group on behalf of the Warwickshire Children's Trust VCS network and am an active contributor to this as income generation is a key anti-poverty measure.
- WWRAS is planning take-up work for the next financial year which will directly support the above strategy and tackle child and family poverty through our involvement in the Warwickshire Financial Inclusion Partnership (FIP). We were successful as a partnership in being awarded £792,000 over two years from LPSA2 money to provide a package of support to financially excluded clients in Warwickshire. WWRAS is planning to carry out benefits take-up work across the county in line with a county financial inclusion strategy. Unfortunately, due to a 50% claw back of this funding from central Government in June 2010 the partnership's activity may need to be scaled down. The FIP is a strategically important partnership in helping to meet Local Area Agreement targets and as a front line response to financial exclusion in the county and all partners are keen for this work to continue.
- I continue to sit on the LAW (Legal Advice Warwickshire) Steering Group. I also continue to sit on the LAW Specialist Services Sub Group, and although this is primarily for agencies holding Legal Aid contracts, it is important that we have an input into this group as a specialist agency and also to monitor opportunities in the area of future Legal Aid funding. The LAW Partnership had its formal launch on 26th February 2010 and subsequently launched its website with the aim of providing a seamless network of referrals between all advice agencies in the county.
- We have been working with all District and Borough Councils on financial inclusion type work and are looking to devise a county-wide benefits take-up strategy which we are hoping all Councils will sign up to.
- We have also worked closely with Stratford District Council in identifying key areas of deprivation in the district, particularly as there are often hidden pockets of deprivation in generally assumed affluent

areas. The local Council has decided, based on independent research that they commissioned, to target areas in Southam that have been identified as being in fuel poverty. WWRAS has been granted a small amount of funding to undertake benefit take-up work for these clients in the next financial year and the Council is also putting together a package of support with the overall aim of alleviating fuel poverty in this area.

NON-WCC FUNDED WORK

We have continued to bring in additional funds from other sources to promote take-up of benefits amongst clients who do not traditionally access advice services. This year we have secured **£97,000** in extra funding and brought in benefit gains of **£732,251** through this extra work which complements our WCC funded services and helps to promote benefits more widely.

Targeted Take-up work with Children's Centres in Nuneaton and Bedworth

We have been funded for two years (2009-2011) by Nuneaton and Bedworth Area Committee to carry out benefits take-up work in Children's Centres. This work has been extremely successful and allows us to employ one worker for two days per week dedicated to this project.

Last year we advised 164 clients and raised just under **£231,593** in additional benefits for this client group.

We were awarded an additional £15,000 at the end of the financial year to expand this successful project to four days per week in 2010/11, due to the huge demand that our service had generated. We are extremely grateful for the continued support of Nuneaton and Bedworth Area Committee in funding this important work.

Interpreter supported work in Warwick District with the Sikh Community

This is provided using WDC funding and interpreter support provided by WCC. It targets those who cannot access the benefits system due to language barriers.

We had 178 client access the service in 2009/10. The number of male and female clients is proportionally the same and the service continues to be predominantly used by those over 50 with a high proportion in their 50s and 40% being 60 or over.

We advise on a wide range of benefits involving a mixture of claims, appeals and more general better off advice. The money gains to these clients for this year amount to just over **£136,500**, an increase of almost £50,000 when compared to last year. This is mainly for disability and ill health benefits

Carers Take-up in Nuneaton and Bedworth

We are also funded by Nuneaton and Bedworth Area Committee to provide benefit take-up work to carers in the Nuneaton and Bedworth Area. We have worked on referral from carers' organisations, self-referral and through using targeted mail shots using local Council data.

200 mailshots were sent out by Nuneaton and Bedworth Revenue and Benefits Team using data from their own records to identify potential carers who were not in receipt of benefit and 69 carers have responded. Of these 32 were helped to make claims, 25 were advised but no further action taken and 12 were referred to other agencies including carer's support organisations. Gains for this year amount to an impressive **£144,824**.

Housing and Council Tax Benefits

We continued to work with Local Council's in Warwickshire to target potential Housing Benefit and Council Tax Benefit claimants through use of mail shots, promotional material and by attending promotional events (although these have been infrequent). The funding was interim funding provided through LPSA2 money and we are extremely pleased that this work has led to us being included in a successful Warwickshire Financial Inclusion Partnership bid for LPSA2 Reward Money. This means that we will be funded to employ two full-time benefits take-up workers for two years from April 2010.

The claims which we have generated though our targeted mail shots have been more modest in this year and we have struggled to secure proper engagement from local Councils due to lack of resources in Local Authorities and restructuring of some authorities which has removed lead personnel who were working with us on this project. Nevertheless, we have still managed to generate an extra **£138,288**, which still highlights the strengths of using the Local Authority's own data to target under-claiming of benefits.

Tax Credits Take-Up

We also secured funding from Her Majesty's Revenue and Customs (HMRC) to carry out take-up and promotional talks across the county to health outlets and community groups. This funding is for two years and expires at the end of March 2011. Due to staff shortages we had a slow start to this campaign, We have agreed with HMRC that we will focus our efforts on Children's Centres across the county following our successful campaign in the Nuneaton and Bedworth Children's Centres.

We advised 86 clients, delivered 14 talks to Children's Centres and health outlets and sent out 850 fliers advertising our service, inviting people to contact us for advice on Tax Credit enquiries. We secured **£42,129** in increased benefits for clients on this project during the past year.

Policy for Older People (POP) Take-Up

This project has not been active in the last financial year, but we have still been collecting results from cases started in the previous year and advising clients on whether their entitlement is correct.

Additional Take-up gains 2009/10

| Campaign | Amount raised | Funding secured |
|-------------------------------|-----------------|-----------------|
| HB/CTB | £138,288 | £29,581 |
| Children's Centre (Nun & Bed) | £231,593 | £16,092 |
| Sikh Centre | £136,500 | £12,700 |
| Carers (Nun & Bed) | £144,824 | £16,093 |
| Tax Credit Take Up | £38,917 | £22,616 |
| POP Take Up | £42,129 | N/A |
| Total | £732,251 | £97,082 |

This represents a 7.5 fold return on the money invested and an enormous boost to both individuals and the local economy.

CASE STUDY

Mrs H first visited the Sikh Community Centre for advice in October 2009. Her mother (Mrs S) was 83, a widow and had dementia, depression and had also had a stroke. Although Mrs S lived on her own, Mrs H was spending a lot of time caring for her. Mrs S could not speak English at all and Mrs H also needed a Panjabi translator. Mrs H also suffered from mental health problems.

I checked Mrs H's benefits and established that she was getting the correct amounts. I then looked at Mrs S's benefits and advised Mrs H to make a claim for Attendance Allowance on her behalf. I helped her to complete the claim form. When the form was submitted, the Disability & Carers Service requested that Mrs S's passport be sent to them. Mrs H was not happy about sending this by post. I spoke to them and they agreed that the passport could be taken to the local Jobcentre Plus and checked there instead. In March 2010, Mrs S was awarded the lower rate of Attendance Allowance of £47.10 per week and arrears of £800.70.

I then re-checked Mrs S's benefits and advised her to claim the extra Pension Credit she was now entitled to. I spoke to the Pension Service on her behalf to request the extra Pension Credit was paid and helped her to complete the request for further information. There was a series of administrative delays and I continued to chase the Pension Service until the Pension Credit was awarded. In July 2010, she was awarded an extra £53.65 per week and this was backdated to the start of the Attendance Allowance award – a total of £1,754.45.

Ian Sidwell (Take-Up Worker)

STAFF as at 18th October 2010

| | |
|--------------------------|---|
| Chief Executive | Mark Stanyer (<i>started May 2009</i>) |
| Service Manager | Lynn Webster (<i>left May 2009</i>) |
| Operations Manager | Stephen Watkins |
| Appeals Workers | Rachel Wilcox Jill Wood John Harbinson Mary Williams Caroline Graham (<i>started May 2010</i>) |
| Information and Training | Sandra Corner |
| Take-Up Workers | Jason Duffey (<i>left October 2009</i>) Paul Turnbull (<i>left June 2010</i>) Ian Sidwell Karen Mitchell (<i>left July 2010</i>) Bal Sandhu (<i>started October 2010</i>) |
| Administrator | Dawn McGuinness (<i>retired April 2009</i>) |
| Admin Assistants | Sam Morgan Denise Peach Kawser Khalifa (<i>started November 2009</i>) |

TRUSTEE BOARD

| | |
|-------------------|--|
| Chair | Paul Tolley |
| Treasurer | Roy Smith |
| Company Secretary | Mark Stanyer |
| Directors | Sarah Fox (<i>retired December 2009</i>) Ramby De Mello Peter Eaves Barbara Farndon (<i>retired December 2009</i>) David Booth (<i>retired June 2009</i>) Christine Mavarakis (<i>joined December 2009</i>) Katherine King (<i>joined December 2009</i>) Steve Lloyd (<i>joined December 2009</i>) Greg Gavin (<i>joined December 2009</i>) Cllr Martyn Ashford (<i>joined December 2009</i>) |

CONTACT BOX

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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 to Friday

[Advisers only – not for members of the public]

OR

(for all of the above)

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