

**Warwick District
Survey of Welfare Rights
and Related Provision
2003-2004**

Executive Summary

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by
Paul Field

with
Rachel Field and Carole Flanagan

UK Research Partnership Ltd

UK Research Partnership Ltd
19 Shaftesbury Road
Earlsdon
Coventry
CV5 6FL

Tel: 024 7671 7123
Email: paulfield@ukrp.co.uk

Executive summary: main findings, conclusions and action points

- This research was commissioned by the Warwick District Welfare Rights Group in the autumn of 2003 (on behalf of a large number of local voluntary, community and statutory organisations), following a decision to withdraw the open door welfare rights service previously available at Bath Place Community Venture in Leamington Spa.
- In 2001-2002 a welfare rights worker visited Bath Place for three sessions a week, and in so doing helped 300 people obtain more than £380,000 in unclaimed welfare entitlements, much of which would have been spent locally.¹ But what will Warwick District lose now that this service is being withdrawn? How much more money would be brought into the pockets of residents, and into the local economy, if more workers could regularly do more sessions over a longer period in several easily accessible venues such as health centres, childcare facilities and church halls in Warwick District? Moreover, what would the impact on the quality of local people's lives be if access to independent welfare rights (WR) and related services was cut back or, in some areas, lost altogether?
- These questions form the core of this research. The study provides a district-wide needs analysis and audit of welfare rights provision, including information, advice, form-filling and advocacy services across the Warwick District area.
- Significant pockets of poverty and disadvantage persist in Warwick District alongside some of the most affluent communities in Warwickshire and the West Midlands. But the nature of need is changing. Personal and household poverty are increasingly linked to demographic factors, such as age and ill-health. This is reflected in the scope and nature of welfare rights claims and appeals made in Warwick District in recent years.

Case studies

- Local case studies illustrate a number of important issues and themes. The poorest and most vulnerable people in our community commonly experience their lives in complex and chaotic ways, and the benefits system that is designed to support them can make them feel even more lost and frightened. Advisers working in statutory services are often so focused on 'their bit' of the welfare rights jigsaw puzzle that they simply do not have the resources (time or expertise) to see clients' problems in the round. This can lead to confusion, poor communications, loss of potential income for clients and growing insecurity amongst some of our most vulnerable people.

Postal survey

- A postal survey was sent to 337 organisations and individuals that were either known or thought to be active in welfare rights or related issues within the Warwick District Council area. We received 93 analysable responses, plus eight others that could not be used (either at all or in their entirety) because they arrived too late, or were incomplete, unanswered or anonymous. This adds up to a total of 101 responses to the survey overall, yielding a response rate of 30%.
- The largest clusters of organisations in the sample (by type) – accounting for about 60% of all responses – work with or represent people with ill-health or disabilities, constituents/local electorates, disadvantaged communities and older people. Other types of people represented include minority ethnic communities, children, women, young people, homeless people, benefit claimants, faith groups, students, and so on.

¹ Warwickshire Welfare Rights Advice Service (WWRAS) figures for 2002-2003 show that, for every £1 spent on supporting their service, £9 is generated from new benefit claims and appeals. Bath Place and the Sikh Centre alone generated £455,000 in additional income for local people in 2002-2003. The Social Services Department's Financial Assessment Visiting Team estimate that they will have generated c.£2m in claims for Warwickshire clients by the end of 2003-2004. A pro rata calculation suggests that WWRAS and this single Social Services team alone generate around £1m a year from benefit claims for Warwick District residents. This excludes the claims supported directly by the CAB, Age Concern, the Young Housing project, MIND, CDP and numerous other voluntary and self-help groups in the area.

- Voluntary sector bodies in the sample (who make up 59% of all those who responded) are much more concerned with health and disability issues and with older people than the statutory sector, and they account for almost all of the activity in the sample that is focused on disadvantaged communities.
- Just over half of those responding report that welfare rights and related help is only an incidental aspect of their activities. Almost 40% describe it as a secondary but complementary service, but the help they give with welfare rights and related issues is an indispensable adjunct to their main activity. This means that around half of all those who offer any kind of welfare rights and related help are likely to see this aspect of their work as essential.
- Seventy organisations are offering a signposting service of some sort, but significant numbers are also supplying direct, hands-on help with such things as making specific claims (almost 50), providing information about entitlements (around 50) and following up claims made but not yet decided (about 30).
- **There is therefore a large, very active welfare rights (WR) and related service network operating in and around the Warwick District (for the most part, though not exclusively, in the voluntary and community sector). This network is providing information, advice and direct help to a wide range of client groups and members.**
- The agencies for whom WR is only an occasional or incidental aspect of their activities make up just over half of all those in the sample who said they offered any kind of WR help. In very many cases, these groups act as first points of contact for people in need in the community. They form a wide cone at the mouth of a funnel which should be capturing and directing enquiries about benefit and other WR needs for other, more specialised, agencies and individuals to deal with. Their role in the WR 'supply chain' and their capacity to pick up on needs in an effective way is therefore critical to the successful delivery of benefits to those who need them most.
- **A significant minority (46%) of all those who responded (not just those who provide some kind of WR help) believe that their members/clients are facing more WR related problems in their lives now compared with two years ago.** Another 26% argue that the level of need is about the same, and only three say there are fewer people with these problems now. Over a fifth could not comment.
- **Those in the secondary and incidental groups are more likely to suggest that the problem has grown – that is, agencies dealing with or witnessing a wider range of client/member needs in the community.** Almost two-thirds of all secondary group respondents suggest that these problems are more pronounced now. And exactly the same proportion (63%) of all voluntary sector respondents bodies are arguing this as well, compared with only 35% of statutory agencies and individuals. Warwick District focused organisations are also much more likely to see a growth in these problems recently (local bodies are almost three times more likely to report this trend than those operating across a wider geographical patch).
- **The biggest growth has been in people needing help with benefit claims and disputes – 77% of all those reporting a growing trend say this is one area that has greatly increased.** Debt management problems come some way behind this, but still account for almost 30% of all WR areas that are thought to have increased in the last two years.
- **A notable minority amongst those who believe need has increased over the last two years (42%) argue that the level of need is now much higher than before. Another 21% say they cannot estimate the scale of growth “because there’s always more demand than we can meet”.**
- Locally focused organisations in the voluntary sector that are providing WR related help as either a secondary or incidental aspect of their service are measurably more likely to suggest that the scale of need is much greater now.
- **Asked why this need had grown, most respondents suggest that the benefits system is more complicated now, that WR advice is harder to come by locally, that the benefits system is harsher, that people have more pressing needs now, including**

more debt and greater poverty, and that the groups facing WR related problems have grown in size (e.g. there are more homeless young people, older people, etc. now).

- As for future trends, those who feel able to comment expect to see much higher levels of need for help with benefit claims and disputes, Tax Credits and debt management over the next two years. Only the demand for help with energy efficiency grants is expected to show any marked decline (but by just six respondents).
- **Voluntary sector bodies are much more likely to forecast higher need in future in relation to benefit claims, disputes and Tax Credits. But statutory bodies are equally pessimistic about the likely growth in demand for debt management services. It is also clear that locally-focused agencies and individuals are far more likely to see growing problems ahead in all areas of need than those with a wider geographical remit.**
- The area of specialist WR related knowledge to have most trained staff is benefit entitlements (190 staff), the vast majority of whom work in Warwick District. However, almost 70% of these Warwick-focused staff are employed by just one statutory body – Jobcentre Plus. The next best supplied area of specialist staff knowledge is Tax Credits (69 trained staff, 59 of whom work for Warwick-focused organisations).
- There are almost twice as many volunteers as staff in ‘main group’ organisations who have debt management training. The best supplied areas of special staff knowledge in secondary and incidental group organisations are benefit entitlements and financial support for students.
- Most staff expertise in giving hands-on help is concentrated in the provision of information about entitlements (191) and making specific claims (117). Most trained information-giving staff are based in Warwick District, primarily focused on JSA and related entitlements in the statutory sector (70% of all such staff are working at Jobcentre Plus). **This implies that the numbers of people working in the independent sector (as paid staff or volunteers) and who are trained to give information on a fuller range of benefit entitlements is quite small (86 in all, of whom only two-thirds are paid staff).**
- The Connexions Service, Jobcentre Plus and the Pensions Service account for 60% of all trained staff working with clients on specific claims, with most of the rest being employed by Warwick District CAB, WWRAS and the Young Housing Project. Although Connexions are part of a statutory service, they are professionally bound to provide an impartial service to their clients. **On balance, therefore, this would suggest that (trained) staff resources in relation to helping people make specific claims are weighted towards the ‘independent’ sector.**
- The numbers (of staff and volunteers) trained to signpost Warwick District residents within the independent sector remain high (at around 150) relative to those in the statutory sector with similar training (at about 65). **So there are twice as many trained personnel signposting in the independent sector.**
- **The question remains, though, as to whether the agencies to whom clients are being signposted in this way have the capacity to respond to the forecast growth in demand.**
- **A picture is emerging of an independent sector that is limited in its capacity to meet growing demand for more in-depth WR related services and, indeed, faces cut-backs in existing service levels because of financial and other constraints (e.g. Bath Place, Warwick District CAB, the Council of Disabled People and MIND).**
- Voluntary sector agencies working to a Warwick District brief, especially those for whom WR is a secondary but complementary aspect of their activities, are much more likely (in some cases three times as likely) to argue that getting help with WR related problems is difficult at the moment.
- **The more hands-on and detailed the support needed, the harder it is to get it free from independent providers. And it is precisely at this level – where claims are most likely to be contentious – that access to independent advice and help is most important.**

- The concluding sections of the questionnaire asked respondents to make suggestions about possible solutions to the sorts of blockages and barriers they see in the provision of a better WR service in Warwick District.
- **Clients are thought to benefit most from a personal service delivered flexibly close to home. The importance of training and of fostering links between agencies is also stressed.** There is explicit praise, too, for the open door service formerly available from WWRAS at Bath Place, and also the CAB's current service. In particular, the Bath Place service was appreciated for being friendly, with clients not feeling stigmatised there "*because people go there for so many reasons*".
- What makes it harder for people to get welfare rights advice? The lack of trained welfare rights advisers is seen as the key difficulty, along with long waiting times, especially at the CAB. Distance and lack of transport are also highlighted as significant problems, particularly for organisations serving people in the outlying villages or for clients with mobility problems, such as older people or those with particular medical diagnoses. The reduction in welfare rights services at Bath Place is seen as particularly detrimental.
- What would respondents do if they found the need for independent WR services increasing significantly during the next two years? **Around 75% of the sample would refer more people to specialist agencies that are able to provide an expert WR service. But very few are in a position to recruit or train more staff or volunteers to do WR work directly with clients or members, and those that might do this would have to appeal for additional resources to help them cope.**
- **There is therefore widespread concern that front-line capacity to deliver reliable, independent WR and related services in Warwick District is inadequate.** There is also a clear preference amongst the large majority of respondents to respond to growing demand by referring more clients to expert WR services. We have seen that most respondents play a secondary or incidental WR role. Moreover, they neither have nor want to acquire the expertise needed to provide a full-blown WR advice service. Many see their function, at best, as providing a reliable signposting service. **But the critical question is whether the front-line capacity to respond to such signposted 'traffic' actually exists in Warwick District in a form that is known to work well for clients. This survey suggests that confidence in future front-line capacity is low.**
- So what should be put in place to increase the provision of independent welfare rights advice in the area?
- The overwhelming view is that the priority should be to provide more open door sessions at local and accessible venues. What is required is more of an expert, one-to-one, personal service (accounting for around 70% of all the priorities suggested). Clearly, this can only be delivered if the capacity is there – most notably, trained advisers in the field.

In-depth interviews

- Interviews were held with 16 people from 15 different organisations (or departments within organisations) in the voluntary and statutory sectors that have a direct local interest in WR related issues – either as providers of WR services or as representatives of client groups with WR related needs. The interviews were conducted with service managers, fieldworkers or volunteers who had relevant 'front-line' and/or policy experience.
- The WR related services provided by the organisations interviewed reflect the full scope of the local WR 'supply chain'. They include everything from central government/DWP checks on entitlements to (and payment of) specific benefits, local authority assessments of people's ability to pay for social services care and help with making housing and council tax benefit claims, through to independent WR advice and advocacy.
- There is a rough divide between those for whom the WR aspect of their service is focused on achieving wider public policy goals – e.g. 'welfare to work' for Jobcentre Plus, or 'fairer charging' for the Social Services Department – and WR seen as an end in itself, as a way of maximising people's incomes and securing welfare rights – e.g. by WWRAS and the CAB.

- Between these two positions is a group of agencies for whom access to WR advice is an essential preventative service, helping to head off personal crises, mental ill-health, deepening poverty and isolation – for older people or their carers, for example, or amongst young people whose lifestyles are so chaotic that they constantly teeter on the edge of crisis.
- **Welfare rights organisations are more likely to take what they describe as a ‘holistic’ approach to clients’ problems. They often report dealing with “carrier bags full of papers and problems” when people first arrive asking for help. These take time and require access to a broad base of WR knowledge and skills to respond to adequately.**
- Statutory agencies are equally likely to refer people to independent WR advice providers as voluntary organisations. Indeed, WWRAS and the CAB are acknowledged as playing a crucial role in assisting with client enquiries that fall outside the scope or competence of individual organisations, irrespective of whether these bodies are part of a central or local government service, or self-help groups working with particular community, social or health care issues. **The independent WR advice sector is widely seen as an essential link for clients in the local WR supply chain.**
- Formal referral links between local agencies are quite weak. Many independent WR providers say that the bulk of their enquiries result from ‘word of mouth’ – from informal referrals channelled through particular community networks. This may be the best way in future to build awareness and take-up in communities that, hitherto, have languished in ‘advice deserts’, beyond the reach of the established network of WR advice providers.

Action point 1: One of the challenges stemming from this research is to strengthen that network of WR advice in Warwick District and to extend its reach into excluded communities.

- A picture is emerging of a rich mix of both specialised and generalist WR information sources accessible to a local network of providers. But the links between some of these sources may be under-exploited.

Action point 2: A WR information partnership or consortium may need to be developed to make better use of all the information resources that are currently available.

- Access to accurate and up-to-date information is critical to the delivery of a reliable and high quality WR service. A number of the smaller self-help agencies contacted for this study report having inadequate or outdated WR related information. **This represents a critical weakness in the fabric of WR advice across the Warwick District area.**
- The other key to quality is the staff training needed to maintain WR related knowledge and skills. **The high quality of WWRAS training is widely acknowledged and represents an absolutely essential local asset.**
- The WWRAS information service is also highly regarded by those who use it. But the knowledge WWRAS provides and the skills they are nurturing to deliver a reliable WR service out in the field are not widespread enough. **The capacity and capabilities of ‘front-line’ agencies in the voluntary sector to recognise and deal with clients’ WR needs (beyond initial signposting) are far less developed than some may have assumed. The sector is simply not equipped to cope with demand.**
- Almost every organisation interviewed, irrespective of size, sector or service, argues that they are working either close to or over full capacity in relation to meeting clients’ and members’ WR needs. **Demand for WR related advice and hands-on help is invariably greater than these agencies’ capacity to meet it: “If we doubled capacity we’d double the numbers getting help”.**
- **The main need in future is either to recruit more trained staff and thereby expand in-house services and/or to build up the capacity of organisations like WWRAS to provide more back-office support and more WR experts in the field.** This expert personal service should also be delivered as close to home as possible in non-threatening environments.

- There is growing appreciation within the voluntary sector that central and local government services are trying to ease client access to certain benefits, encourage higher take-up in some quarters (e.g. amongst the elderly) and are 'softening' their approach to claimant queries. But there remains a suspicion that government agencies are constrained by financial, performance or policy targets to focus on vetting rather than widening benefit claims.

Action point 3: The clear implication of these different sectoral perspectives is that some kind of strategic WR forum should be created – probably at a County level – to manage the information flows and sharing, cross-referrals and joint planning that local agencies believe is required.

- The view is that the public sector should be funding more independent WR provision and that the service as it stands is inadequate, particularly in relation to pockets of unmet need in isolated communities. There is support voiced, too, for the local authorities to be joining together to take a strategic view of WR advice needs in the context of long-term, preventative, anti-poverty policies.
- There is widespread concern that recent (and any further) cuts in independent WR provision will be very damaging to local interests from a number of points of view. The impacts – economic, personal and social – add up to a measure of the return on investment that can be derived from spending on WR and related provision in Warwick District. **Not only does WR advice produce additional income from new benefit claims and appeals (amounting to millions of pounds a year), but the quality of people's lives is also measurably improved.**
- Views on what is needed in future to meet demand fall roughly into two camps – the pragmatic and the strategic. The 'pragmatists' want all recent cuts in services to be reinstated immediately. Those who take a more strategic view argue for a public sector commitment to fund an infrastructure of independent WR provision across the District, working in partnership with the statutory services.

Action point 4: The local authorities should join forces to lead a new alliance against poverty in Warwickshire as a whole, backed-up by a medium term (three year) package of funding for the delivery and enhancement of local WR services.

Useful local contacts and national help-lines

	Opening hours
<p>Warwick District Council PO Box 2180 Riverside House Milverton Hill Royal Leamington Spa CV32 5QW Tel: 01926 456837/38/39</p>	
<p>Jobcentre Plus Brandon House Holly Walk Leamington Spa CV32 4EH Tel: 01926 302600</p>	<p>Monday, Tuesday, Thursday, Friday – 9.00 am to 5.00 pm Wednesday – 10.00 am to 5.00 pm</p>
<p>Department of Social Security St Stephen's House Prospect Hill Redditch B97 4DP Tel: 01527 590000</p>	
<p>Pension Service surgeries:</p> <p>SYDNI Centre Cottage Square Sydenham Leamington Spa</p>	<p>Wednesday – 12.30 pm to 2.30 pm (fortnightly)</p>
<p>Kenilworth Connection Abbey End Kenilworth</p>	<p>Thursday – 10.00 am to 12.00 noon (weekly)</p>
<p>The Gap Community Centre 39 Oakwood Grove Warwick CV34 5TD Tel: 01926 494200</p>	<p>Thursday – 10.00am to 12.00 noon</p>
<p>Leamington Library</p>	<p>Friday – 10.00 am to 12.00 noon (weekly)</p>
<p>Warwick District Citizen's Advice Bureau (CAB) 10 Hamilton Terrace Leamington Spa CV32 4LY Tel: 01926 457900</p>	<p>Monday – 10.00 am to 3.30 pm, 6.00 pm to 8.00 pm Closed Tuesdays Wednesday and Friday – 10.00 am to 3.30 pm Thursday – (telephone only) 10.00 am to 3.30 pm Home visits can be arranged</p>
<p>CAB outreach at Warwick Baptist Church</p>	<p>Wednesday – 10.30 am to 1.30 pm</p>

	Opening hours
<p>Agencies speaking other languages:</p> <p>Satkaar Lindi Sydni Centre Cottage Square Off Marlows Walk Sydenham Leamington Spa CV31 1ET</p> <p>Sikh Community Centre Parmjit Nagi 1 Mill Street Leamington Spa CV31 1ES Tel: 01926 883129</p>	Monday to Friday – 9.30 am to 4.00 pm
<p>Council of Disabled People, Information Service Rehab Hospital Heathcote Lane Heathcote Near Warwick CV34 6SR Tel: 01926 889349</p>	Monday to Friday – 9.00 am to 5.00 pm
<p>Young Housing Project (Project for 16-25 year olds) 38-38a High Street Leamington Spa CV31 1LW Tel: 01926 883179</p>	<p>Advice service opening hours:</p> <p>Monday – 10.00 am to 12.00 noon and 1.30 pm to 4.30 pm Tuesday – 1.30 pm to 4.30 pm Thursday – 10.00 am to 12.00 noon Friday – 10.00 am to 2.00 pm (Appointments at other times)</p>
<p>Care & Repair 25 Clemens Street Leamington Spa CV31 2DP Tel: 01926 336612</p>	Telephone service only
<p>South Warks Carers Support Service 10-14 Chapel Street Warwick CV34 4HL Tel: 01926 493207</p>	Monday to Thursday – 9.30 am to 4.00 pm (Answerphone at other times)
<p>Age Concern Warwickshire (Head Office) 10 Clemens Street Leamington Spa CV31 2DL Tel: 01926 883118</p>	Monday to Friday – 10.00 am to 4.00 pm
<p>Capita Assistance (national help-line):</p> <p>Welfare benefits – Tel: 0845 120 2954</p> <p>Debt problems – Tel: 0845 120 2951</p>	<p>Monday to Friday – 8.00 am to 6.00 pm</p> <p>Monday to Friday – 8.00 am to 6.00 pm</p>