



SURREY WELFARE RIGHTS UNIT IS SEEKING TO RECRUIT A TREASURER

We're looking for a motivated finance professional to join our Trustee Board as Treasurer, provide us with financial strategic direction and help us maintain our long-term sustainability

Working closely with our Chair and Chief Officer, your key responsibilities will include:

- Keeping the Board informed about its financial duties and responsibilities
- Guiding and advising the Board in the approval of budgets, accounts and financial statements
- Chairing the Board's Finance Sub-Committee
- Reviewing the quarterly and year end accounts produced by our Administrator
- Presenting the year end accounts at the Annual General Meeting
- Ensuring that proper financial procedures and controls are in place to safeguard the charity's resources
- Ensuring that the charity has appropriate reserves and investment policies

You don't need to have been a trustee before, but you'll need to:

- have recognised professional financial qualifications or experience
- ideally, have some knowledge or experience of charity finances
- be familiar with Quickbooks accounting systems and spreadsheets
- have the skills to analyse proposals and examine their financial consequences
- be able to explain complex financial information in an accessible way
- be able to exercise good independent judgment and if necessary to make difficult recommendations
- work effectively as part of a team
- have the time and flexibility to respond to the demands of the charity
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality, equality and data protection
- represent Citizens Advice professionally at all times

If you are interested in joining our successful and expanding service, as we continue to meet the advice needs of the diverse communities we serve, we would love to hear from you. To give a flavour of what we do, we have included our 2022/23 Impact Report.

To find out more, please email our Chair at chair@swru.org

We welcome applications from all sections of the community and different backgrounds who will bring enthusiasm and a fresh perspective.



Role title: Trustee Board Treasurer

Please complete this electronic form, or print off and complete in **black** ink and return to:

Trustee Board Chair (Confidential)
Surrey Welfare Rights Unit Unit
14A, Monument Way Depot
Monument Way East
Woking, Surrey
GU21 5LY or

E-mail: chair@swru.org

Closing date: N/A

1. PERSONAL DETAILS

Surname and Title			
Forename(s)			
Address			
Post Code		E-mail address	
Home telephone number		Work telephone number	
Do you have a current driving licence?	YES/NO	Do you have the use of a car?	YES/NO

2. EDUCATION AND QUALIFICATIONS

Please give details of educational qualifications you have obtained.

General Education		School, College or University	Examinations taken/to be taken and qualifications obtained
From	To		

3. TRAINING AND DEVELOPMENT

Please give details of any relevant training and development undertaken.

Course	Date

**4. MEMBERSHIP OF PROFESSIONAL BODIES
PROFESSIONAL or VOCATIONAL QUALIFICATIONS**

Name of Body/Qualification	Class/Grade of Membership	Date

5. PRESENT OR MOST RECENT EMPLOYMENT

Post Title			
Reason for Leaving			
Employers Name and Address			
Post Code		Telephone Number	

Please give a brief description of your current or last post and responsibilities.

6. PREVIOUS EMPLOYMENT

Please give details of all relevant previous roles, both full and part time, paid or unpaid, including those in a voluntary capacity. Please list in order, starting with the most recent first.

Date		Name and Address of Organisation	Job/Role Title, Brief Description of Duties and Reason for Leaving
From	To		

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7. EXPERIENCE AND ACHIEVEMENTS

You are invited to provide further information in support of your application. Please make full use of this section, and continue on additional sheets if necessary. Please refer to the guidance notes for completing this section.

REFERENCES

8.

Please provide the names and addresses of two referees, one of which must be your present or most recent employer. We reserve the right to take up a reference from any previous employer.

Name

Name

Address

Address

Job Title

Job Title

Relationship

Relationship

Telephone Number

Telephone Number

Fax Number

Fax Number

E-mail address

E-mail address

May we contact the above without further reference to yourself?

YES/NO

May we contact the above without further reference to yourself?

YES/NO

9.

MEDIA

Please complete this section, it will help us to monitor the success of our advertising. Where did you find out about this position?

- Internet Please Specify Source: _____
- Newspaper Please Specify Source: _____
- Friend / Colleague Please Specify Source: _____
- Other Please Specify Source: _____

10

SELECTION ARRANGEMENTS

Should you require any special arrangements for interview or any other selection procedure, please let us know, eg: mobility access, access to disability parking, etc.

11. REHABILITATION OF OFFENDERS ACT 1974

Have you ever been convicted of any criminal offence, other than a conviction which is spent by virtue of the Rehabilitation of Offenders Act 1974?
If yes, please supply details:

Having a criminal record will not necessarily bar you from working for SWRU – much will depend on the type of job you have applied for and the background and circumstances of your offence. For some posts, an offer of employment will be subject to a DBS check. If this applies to the post for which you are applying, this will be noted in the job description.

YES/NO

12. ELIGIBILITY TO WORK IN THE UK?

Do you have any restrictions on taking up the this role in the U.K.?
If yes, please supply details:

YES/NO

13. DISCLOSURE

For the purposes of the Data Protection Act 1998 the Data Controller is Surrey Welfare Rights Unit.
I confirm that the information I have provided above is true and correct and that the information may be used for registration purposes under the Data Protection Act 1998. I give my consent and understand that data relating to this recruitment procedure will be processed and stored. I accept that if any of the enclosed information is found to be untrue after my appointment, I may be liable for dismissal without notice

Signature		Date	
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If you are sending your application form by email, please mark this box
(as a substitute for your signature) to confirm that you agree to the above declaration.

CONFIDENTIAL

Diversity monitoring

Please note this section will be detached before any shortlisting.

Role title:	
Candidate ref. number (for office use only):	

The Citizens Advice service is committed to valuing diversity and promoting equality. We encourage and welcome applications from suitably qualified candidates from all backgrounds regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.

In order to achieve these aims we need to know about the diversity of people who apply to work in the service. Please help us by providing the information requested in the form below

Data protection overview

If you are happy to provide it, we will use this information for the sole purpose of allowing us to monitor equality of opportunity and treatment as necessary to maintain or promote equality within Surrey Welfare Rights Unit.

The information you give us will be kept securely, won't be shared outside the service and is confidential.

It will not be seen by anyone responsible for making recruitment decisions or have any impact on you directly.

If you are successful in your application and we require this information for other purposes, you will be asked to provide it separately - i.e. this form will not be used for other purposes.

If you would prefer not to answer any of the questions we ask, please leave them blank. If you would like us stop using the information you provide, please contact us.

Thank you for your co-operation.

The following information will not be seen by the recruitment panel and will not affect your application.

Age

Which age bracket do you fit into? Put a cross in the relevant box.

Under 25	
25 - 34	
35 - 44	
45 - 54	
55 - 64	
65 and over	
Prefer not to say	

Gender

What best describes your gender? Put a cross in the relevant box or write in a preferred term.

Female	
Male	
I prefer to use another term	
Please write in.....	
Prefer not to say	

Sexual orientation

What is your sexual orientation? Put a cross in the relevant box or write in a preferred term.

Heterosexual/Straight	<input type="checkbox"/>
Gay Man	<input type="checkbox"/>
Gay Woman/Lesbian	<input type="checkbox"/>
Bisexual	<input type="checkbox"/>
I prefer to use another term Please write in.....	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

Ethnic origin

How would you describe yourself? Choose **one** section (A to E) and put a cross in the relevant box within it.

A. White	English/Welsh/Scottish/Northern Irish/British	
	Irish	
	Gypsy or Irish Traveller	
	Any other White background Please write in.....	
B. Mixed/multiple ethnic groups	White & Black Caribbean	
	White & Black African	
	White & Asian	
	Any other Mixed/multiple ethnic background Please write in.....	
C. Asian/Asian British	Indian	
	Pakistani	
	Bangladeshi	
	Chinese	
	Any other Asian Background Please write in.....	
D. Black/African/	African	

Caribbean/Black British	Caribbean	
	Other Black/African/Caribbean background Please write in.....	
E. Other ethnic group	Arab	
	Any other ethnic group Please write in.....	
Prefer not to say		

Disability

A disabled person is defined under the Equality Act 2010 as someone with a **‘physical or mental impairment which has a substantial and long term adverse effect on that person’s ability to carry out normal day-to-day activities.’**

Do you consider yourself to be disabled under the Equality Act 2010?

Yes	
No	
Prefer not to say	

The information on this form is for monitoring purposes only. If you require any reasonable adjustments to be made in the recruitment process or at work subsequently if appointed, please make sure you tell us separately from this form. We follow the social model of disability which believes that it is the barriers created by society which disable people. We will use reasonable adjustments wherever possible to remove those barriers.

Gender Identity

Do you identify as *Trans?

Yes	
No	
Prefer not to say	

***Trans is an umbrella term to describe people whose identity is not the same as the sex they were assigned at birth. People under the trans umbrella may describe themselves using one or more of a wide variety of terms – including transgender.**

Religion or belief

Which group below do you most identify with? Put a cross in the relevant box.

No religion	
Christian (including all denominations)	
Buddhist	
Hindu	
Jewish	
Muslim	
Sikh	
Any other religion or belief	
Please write in.....	
Prefer not to say	

**Surrey Welfare Rights Unit
Impact Report
2022/23**



Welfare Rights this year

The aftermath of Covid arrived in the shape of a Cost of Living crisis. As food and energy prices escalated, local advice services quickly shifted to becoming primary outlets of vouchers, grants, tokens and emergency support. This was supposed to be the year we got back on track. As it turned out, the advice sector was flat out advising on household support and emergency payments, and welfare rights focussed on showing how far behind benefit rates had fallen when compared to actual essential bills. We heard from families who had never used foodbanks before, and the county set up a warm hub network for the winter months; an unprecedented development. We saw more and more residents claiming Universal Credit for the first time, and dealt with queries from people still affected by the pandemic, including long-Covid. Advising EEA households after the end of the Brexit transition was also challenging, adding a new complexity to our immigration advice. 2023/24 will be a year for assessing the longer term impacts of the 2020s so far. Hopefully we will see some stability and recovery, particularly for lower income residents.



A few words from the Trustee Board

I am pleased to report that Surrey Welfare Rights Unit continues to flourish. Our new Parent Carer project, Moving Into Adulthood, has been a great success and we are delighted that Surrey County Council is to continue to fund this project for another year. As mentioned above, the cost of living crisis has had a significant impact on our work and we know that fuel costs continue to have a huge impact across all Citizens Advice services and their clients.

During the year we said farewell to one of our Trustees, John Fairley, and I should like to thank him for the contribution he made during his time on the Board.

We completed a full Leadership appraisal of the Board and are now busy implementing our Board Development Plan. We are also working on developing our new Strategy, making sure it aligns with Citizens Advice's own Strategy. This has included listening to our service users, consulting with staff and a visit from Dame Clare Moriarty, CEO of Citizens Advice. All staff and Trustees had a very positive round table discussion with her and were able to demonstrate the value of second tier specialist services.

None of the work highlighted in this report would have been possible without the expert leadership of our Chief Officer, Maria Zealey, our very competent staff and my fellow Trustees, and of course the continued support of our funders. Thank you.

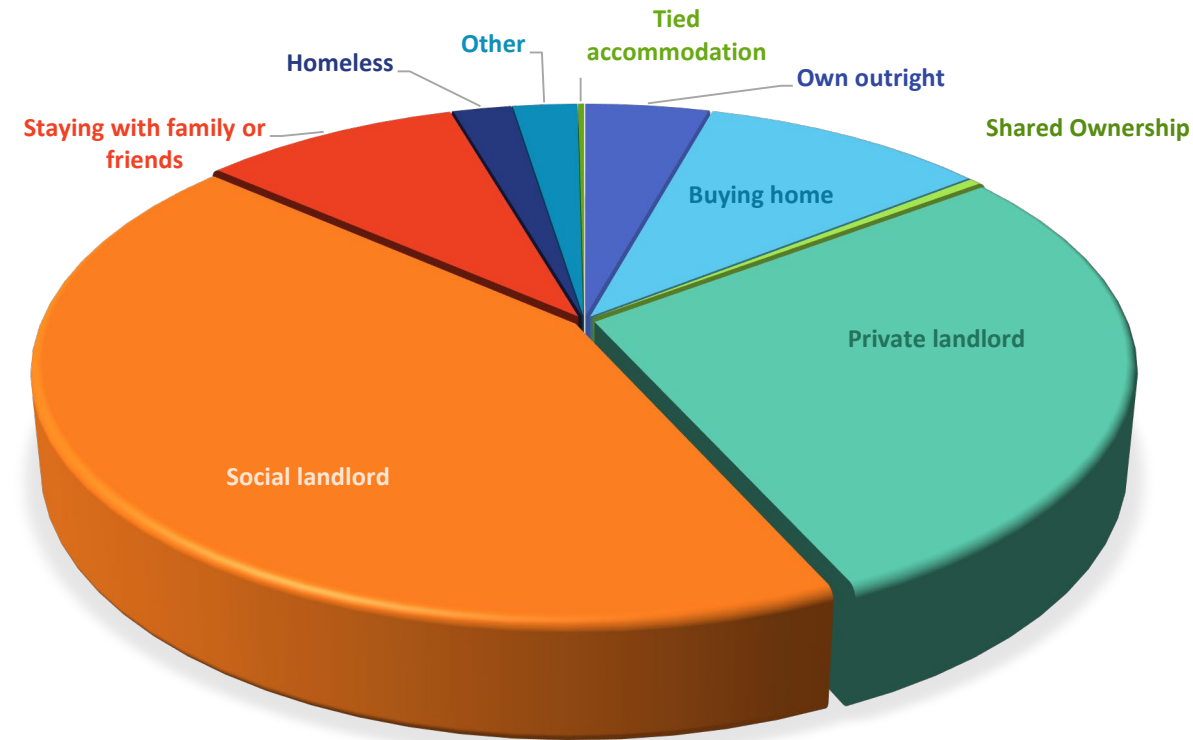
Jane Bourgeois Trustee Board Chair

We helped those most in need

Our case recording system, Casebook, captures housing status along with other profiling data. Compared to last year's statistics we saw a drop in enquiries from households who were owner occupiers or those with a mortgage. We saw an increase in homeless clients who also faced benefit problems. Social housing tenants endured benefit problems far more than any other housing type.

Benefit issues and the impact on the security of accommodation often go hand in hand and this was reflected in a 32% rise in housing related enquiries during this year.

The clients who were disabled or long-term ill increased significantly during the previous year, from 57% to 66%, and this year we saw a further increase to 68%. This is a clear indication of the enormous barriers faced by disabled residents and those coping with ill health when navigating the benefit system, and keeping benefits in payment. This includes households with disabled children, evidenced by a 16% rise in DLA enquiries this year.

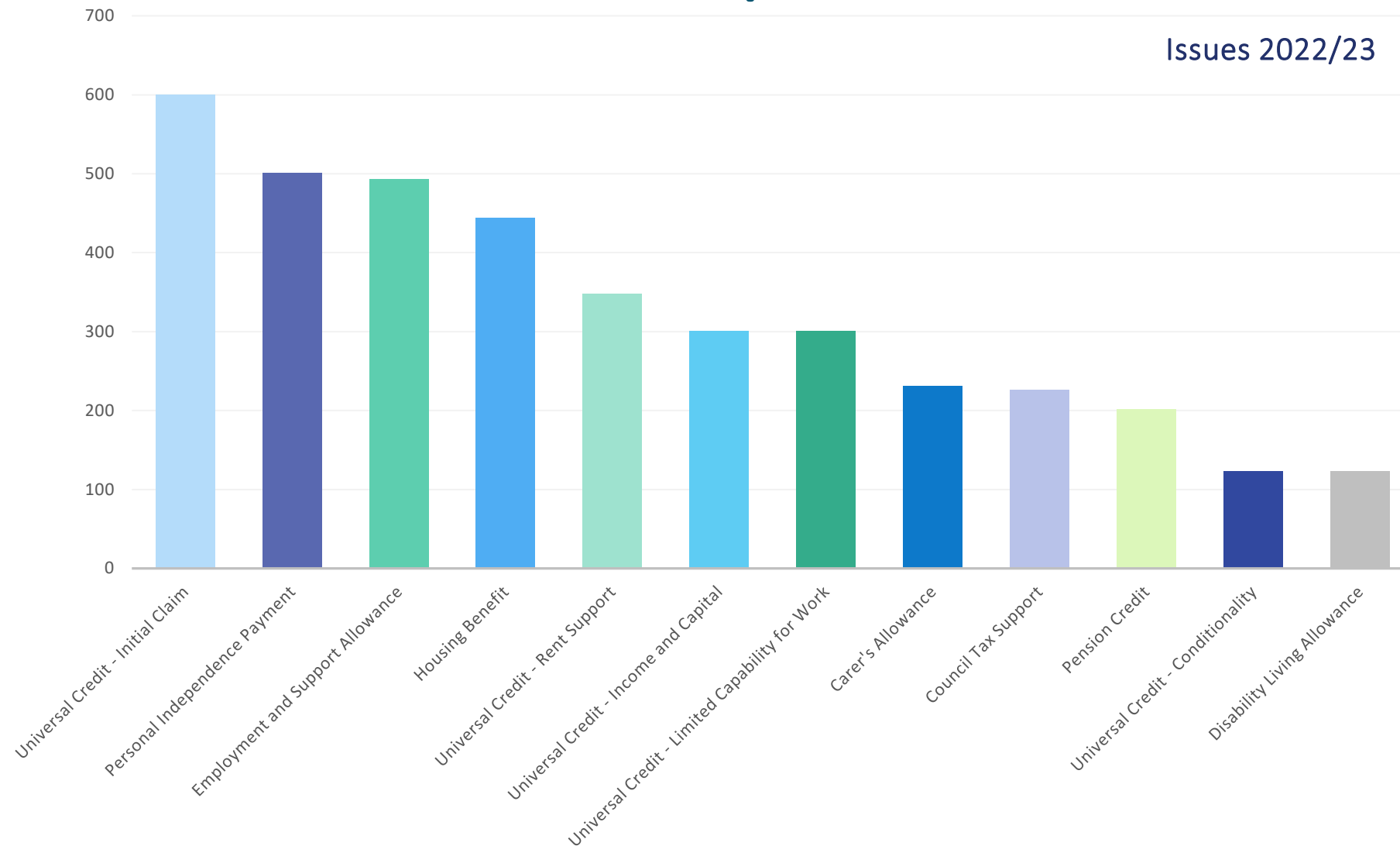


We helped those most in need - continued

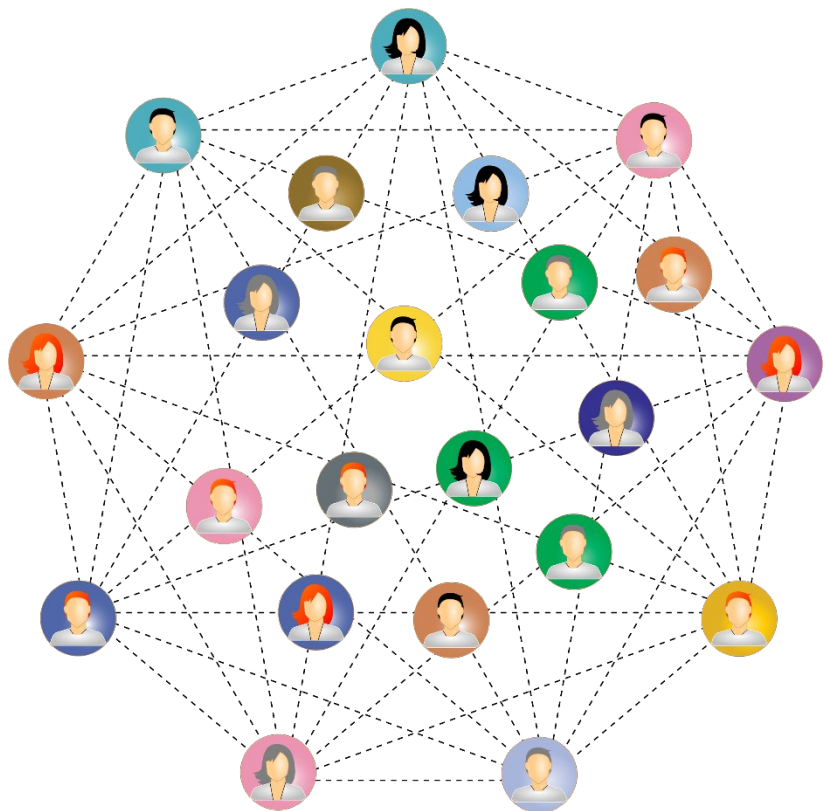
Clients who self-declared as White British dropped from 71% to 66% this year. You can see from the chart that those unable to work due to disability or illness were the largest “occupation” group contacting us for help. Benefit cap queries rose by 188%. We hope this trend reverses with the 2023/24 rise in the benefit cap limits. Households seeking benefit checks, rather than queries concerning a particular benefit, were up 158%. Understanding how benefits interconnect or overlap can be a real challenge for people who are not familiar with the system. Queries concerning conditionality and sanctions in the Universal Credit system were up 32%, reflecting a tightening of the rules which is a trend continuing into 2023/24.



.....with these benefit problems



In total our advice had this much value



Financial Outcomes direct and indirect £2,846,990

Client benefit gain confirmed £486,805
Health, social care and other gains
£15,576

Our Fiscal Benefit was £205,289

Fiscal Benefit: Avoiding cost of evictions and temporary housing, avoiding costs of unemployment, and reducing use of NHS services by resolving problems that cause stress and anxiety and depression.

Our Public Value was £2,760,314

Public Value: Improvements in health, well-being, participation and productivity.

Headline figures:

Reducing use of NHS £58,338

Keeping people in work £71,087

Homelessness prevention savings
£75,874

Fiscal benefit of supporting claimants
with benefit debts £80,201

**For every £1 of funding we
received our clients gained
£11.89 and we created £11.53
of public value**

How we work out our value

Citizens Advice help us calculate our value using a Treasury approved cost-benefit tool. Four key variables are considered.

Affected population: Number of people receiving advice about a specific issue

Impact: Impact of advice on a specific outcome

Deadweight: What would have happened anyway without our advice

Optimism bias: Accounting for best practice, timeliness and independence of research

In addition to our financial outcomes we also try to record non-financial outcomes such as blue badges or a social care assessment, as well as “soft” outcomes such as a client reporting improved health, or resolution of a complaint.

The value of e-training is difficult to quantify. However, the more volunteers and staff are supported and have access to training, the more likely it is that they are satisfied at work, and will remain at the organisation. Each adviser that we train and support will, in turn, help hundreds more local residents.

Our research and campaigning work is equally important as helping individuals resolve their benefit problems. The value of this work is when we successfully raise an issue with key parliamentarians or decision-makers, and see changes happen that help those struggling to navigate the social security maze.

Moving into Adulthood project

This project was set up in June 2022 to enable parents and Carers of disabled young people (14 - 25) to obtain information & advice on welfare benefits. For disabled young people, accurately identifying benefit entitlement whilst in education, training, or employment is critical to future planning, especially income maximisation.

Whilst the core elements of the project have continued across the year, it is worth noting the interactive web-based benefits information resource tool is now in its trial stages before going 'live'. All this work has been carried out by SWRU staff. The web-tool will allow the target groups to access current, accurate benefits information tailored to their circumstances on their phones or other devices.

The project has visited nine Community Hubs across Surrey to give informal talks on claiming benefits and one-to-one advice sessions. The project has attended Carer events in Surrey with SWRU's information stand. At each event there has been a long queue for information or referral. At Surrey County Council's Carers' Network event in early June 2023, a total of 15 carers sought information and support.

In the last six months, Moving into Adulthood has been focussing on enhancing links with special schools across the county. The project attended six different school events with the SWRU information stand, generating considerable interest at each school not only from the target group but also staff & trustees. We found wide recognition that advising parents, Carers and disabled young people on benefit matters is crucially important but finding the right advice and support can be difficult. The school visits have generated many enquiries/referrals from parents & Carers.

What they said.....



“The training was outstanding. I am very grateful for both their time and effort in a very complex topic area, as it’s incredibly important in what I do.” – Care Leavers’ Team

“Thank you once again for helping make this possible. It has taken a huge financial relief off us” – Casework Carer

“I keep going back to the slides and presentation, really great material to have and use!” – Attendance Allowance training delegate

“Easy to access and professionally administered and run, thank you.” – Training delegate

“Thank you for your patience in guiding me through this case. I have learnt a lot.” – Local Citizens Advice Volunteer Adviser

“I have no words to express my gratitude towards your professional way in dealing with my parents situation.” – Casework Carer



Training the advice sector

SWRU courses delivered	33
Local advice workers trained	376
Commissioned courses delivered	33
Local staff and volunteers trained	460

New courses included:

- Social care, charging and welfare benefits
- Attendance Allowance
- Benefits Overview for Trustees
- Should I stay or should I go? – Legacy benefits vs Universal Credit

We ran 16 more courses compared to the 2021/22 year, responding to both rising demand for training, and rapid changes in social security legislation. The numbers of local volunteers and staff we trained rose by 42%. A significant part of this increase in activity was funded by Surrey County Council as part of their No-One Left Behind programme.



Working with others for better client outcomes

Local Citizens Advice in Surrey,
Hampshire, Merton and Lambeth, and
Sussex

Surrey County Council – Policy and
Commissioning

HMCTS

Jobcentre Plus

Surrey District and Borough councils

Citizens Advice –National Office

No-One Left Behind

Work and Pensions Select
Committee

Department of Work and
Pensions

Surrey Welfare Advice Group

SCC Adult Social Care

Cost of Living Partnership

Surrey Warm Hubs network

SCC Carers Network

Who we are

Staff

Maria Zealey – Chief Officer

Brigid Caffyn-Parsons – Welfare Rights Adviser

Karen Creeth – Welfare Rights Adviser

Sarah Fell – Welfare Rights Adviser

Carol Gibbs – Senior Welfare Rights Adviser

Lou Glencross – Parent and Carer Benefits Adviser

Helen Haws – Welfare Rights Adviser

Ray Savage – Administrator

We would like to thank

Surrey County Council

Woking Borough Council

Elmbridge Borough Council

The National Lottery

Trustees

Jane Bourgeois - Chair

John Fairley

Anne Haigh

Roger Hurcombe

Dani Jordan

Keith O'Neill

Steve O'Sullivan - Treasurer

Anne Pirie

Suja Subramanian

Surrey Welfare Rights Unit aims to provide the advice people need for the problems they face and improve the policies and practices that affect people's lives.

We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

We are a member of the Citizens Advice service.

**Surrey Welfare Rights Unit
Company Number: 3335128
Charity Number: 1062826
FCA Number: FRN 617760
OISC Registered
AQS Standards in Welfare
Benefits Casework and
Telephone Support**