

**Surrey Welfare Rights Unit  
Impact Report  
2024/25**



# This year

Welcome to our 2024/25 Impact Report. Every year I wonder if I am going to be able to report a calmer, more settled year, but for all of us involved in benefits advice, you will know that this was another year of change, challenges and concern. Social Security continues to be one of the key targets for Treasury policy, despite a political change in the 2024 election. Already this year we have seen a huge campaign to protect PIP from sweeping cuts. The success of that challenge will be short-lived as significant cuts to sickness benefits are looming early in 2026. Managed Migration onto Universal Credit resulted in a rise in enquiries as the DWP extended the programme to ESA claimants. This was not plain sailing, and we are still seeing significant numbers of clients without the correct payments, and confusion around transitional rules that apply with their new benefit. We welcomed new advisers, Fernanda Tuozzo and Anna Kanisius, as well as our first volunteer Finance Officer, Qin Zou. We also said goodbye to Ray Savage, who had been the Unit Administrator for many years. We achieved **Green** outcomes across all governance areas in our year 3 Citizens Advice membership audit – a real achievement for a small team. I would like to thank all the staff for their hard work during this year, thanks to the paid and volunteer support that keeps the office going, and to the Trustees for their support to me and the charity of course – which I know is much appreciated by all those who use our services.

**Maria Zealey**      **Chief Officer**

# A few words from the Trustee Board

On behalf of our Trustee Board, I am pleased to report that Surrey Welfare Rights Unit has continued to deliver a successful service to all its users, during what continue to be challenging times, under the experienced and expert leadership of our Chief Officer, Maria Zealey and our team of dedicated staff. Between them they share a high level of expertise in welfare rights as well as delivering a much needed training service to all sectors. Our reputation for high quality support continues to grow with subscribers from areas outside Surrey. The Trustee Board extends its thanks to them all.

Our biggest challenge in the coming year, along with the whole voluntary sector in Surrey, is local government reorganisation and how our services will be impacted under the new unitary authorities. We continue to monitor developments and liaise with our primary funder, Surrey County Council and colleagues across Surrey.

Our Parent Carer project, Moving into Adulthood, funded by Surrey County Council sadly ends this year having demonstrated that this is a much needed service for Carers of young people. It has been an example of how the voluntary sector can provide preventative services to help alleviate the pressures on the statutory sector.

My congratulations go to our Trustee Board and Maria Zealey, CO, for successfully contributing to the success of our 3 year quality audit covering areas such as governance and operational delivery.

Thank you to our funders and subscribers for your continued support.

**Jane Bourgeois**     **Trustee Board Chair**



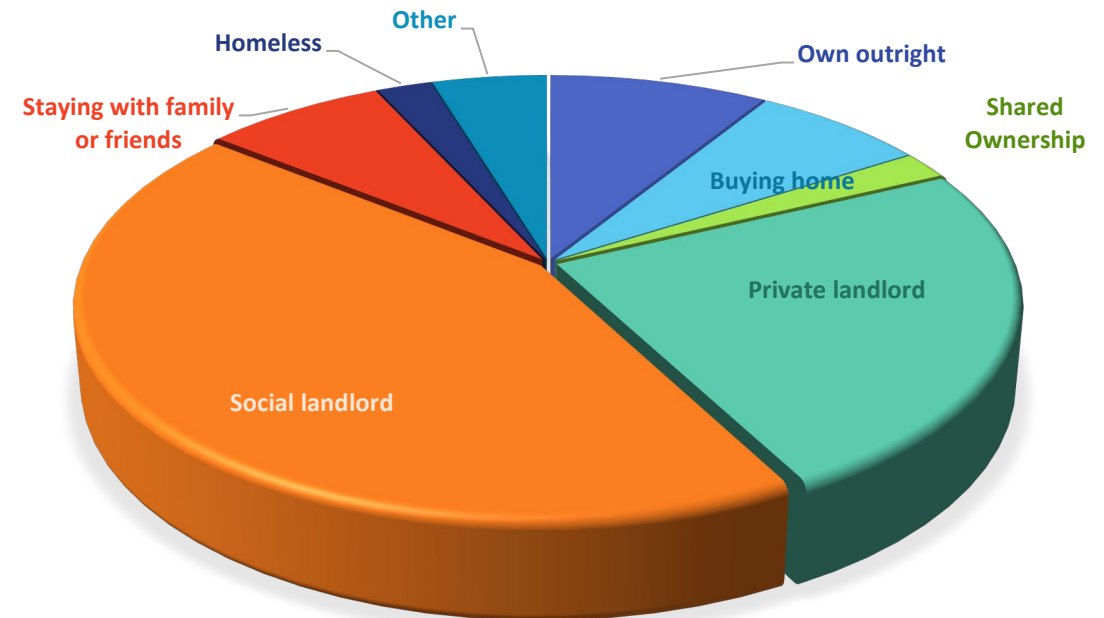
# We helped those most in need

Our case recording system, Casebook, captures housing status along with other profiling data. Compared to the previous year's statistics we saw a rise in enquiries from households who were owner occupiers, and shared ownership clients. Social housing tenants still endure benefit problems far more than any other household type.

42% of our clients declared they had a disability or long-term illness and only 23% said they did not have an illness or disability. The remaining number preferred not to say. This is clear evidence of the enormous barriers faced by disabled residents and those coping with ill health when navigating the benefit system.

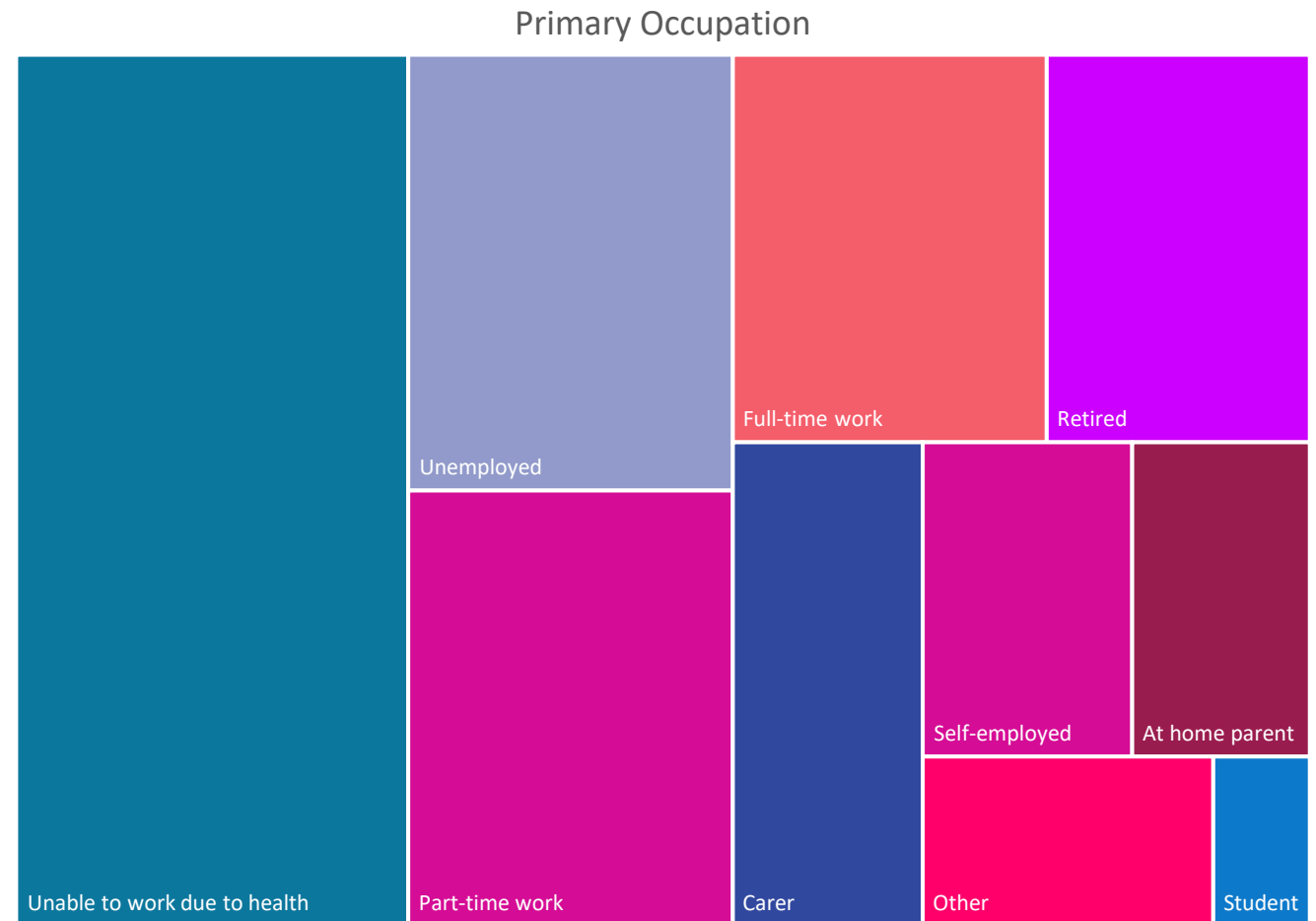
10% of our clients self-declared as non-White British, and 21% were non- British.

Over 20 different nationalities were recorded.



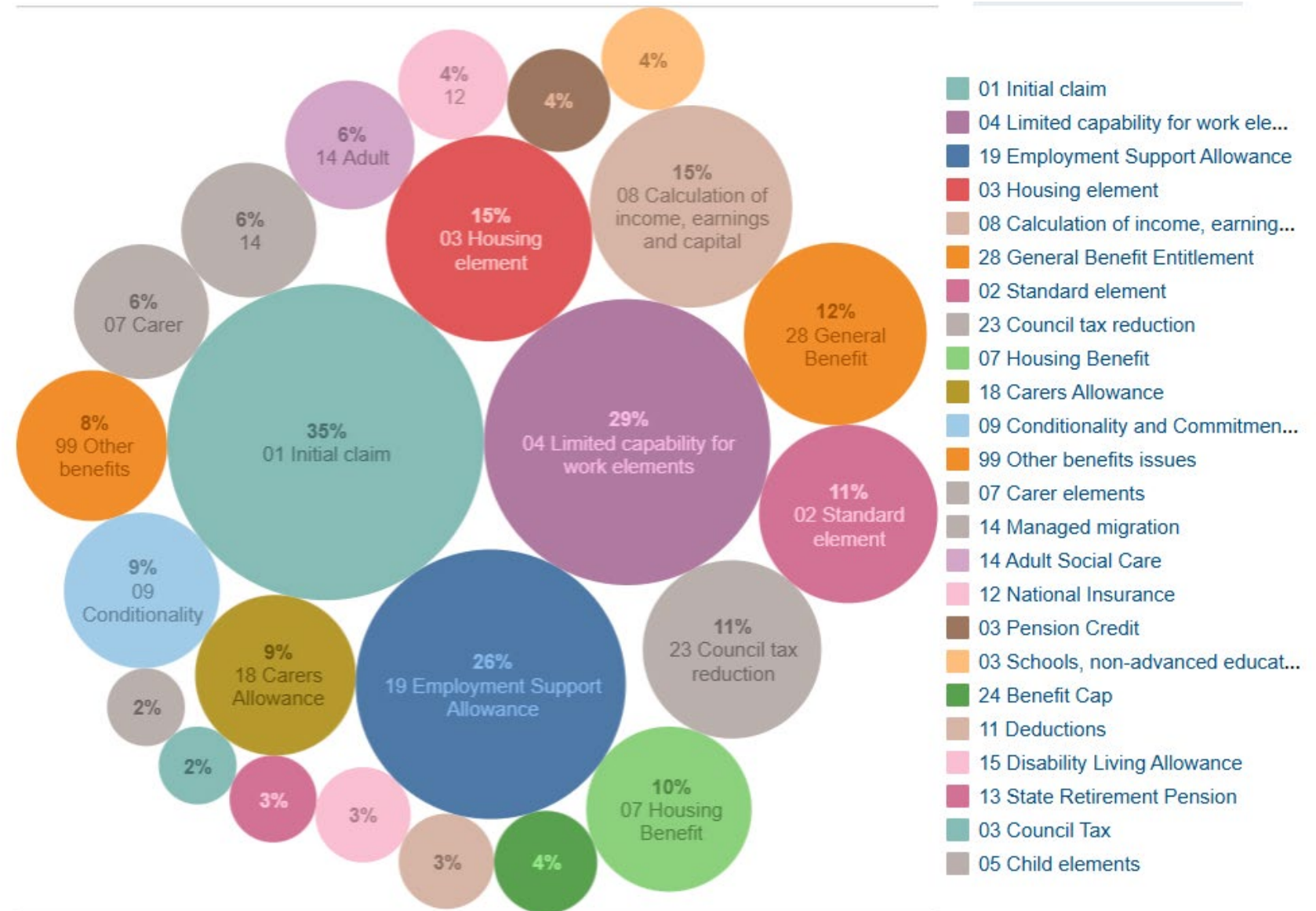
# We helped those most in need - continued

You can see from the adjacent chart that those unable to work due to disability or illness were the largest “occupation” group contacting us for help. We saw an increase in enquiries concerning Jobseeker’s Allowance, State Pension and Attendance Allowance. Queries relating to overpayments of Housing Benefit and Council Tax Support increased by 58%. Predictably, Universal Managed Migration queries increased by 257% and enquiries concerning the EU Settled Status scheme were up by 56%, despite the scheme being in its 5<sup>th</sup> year.

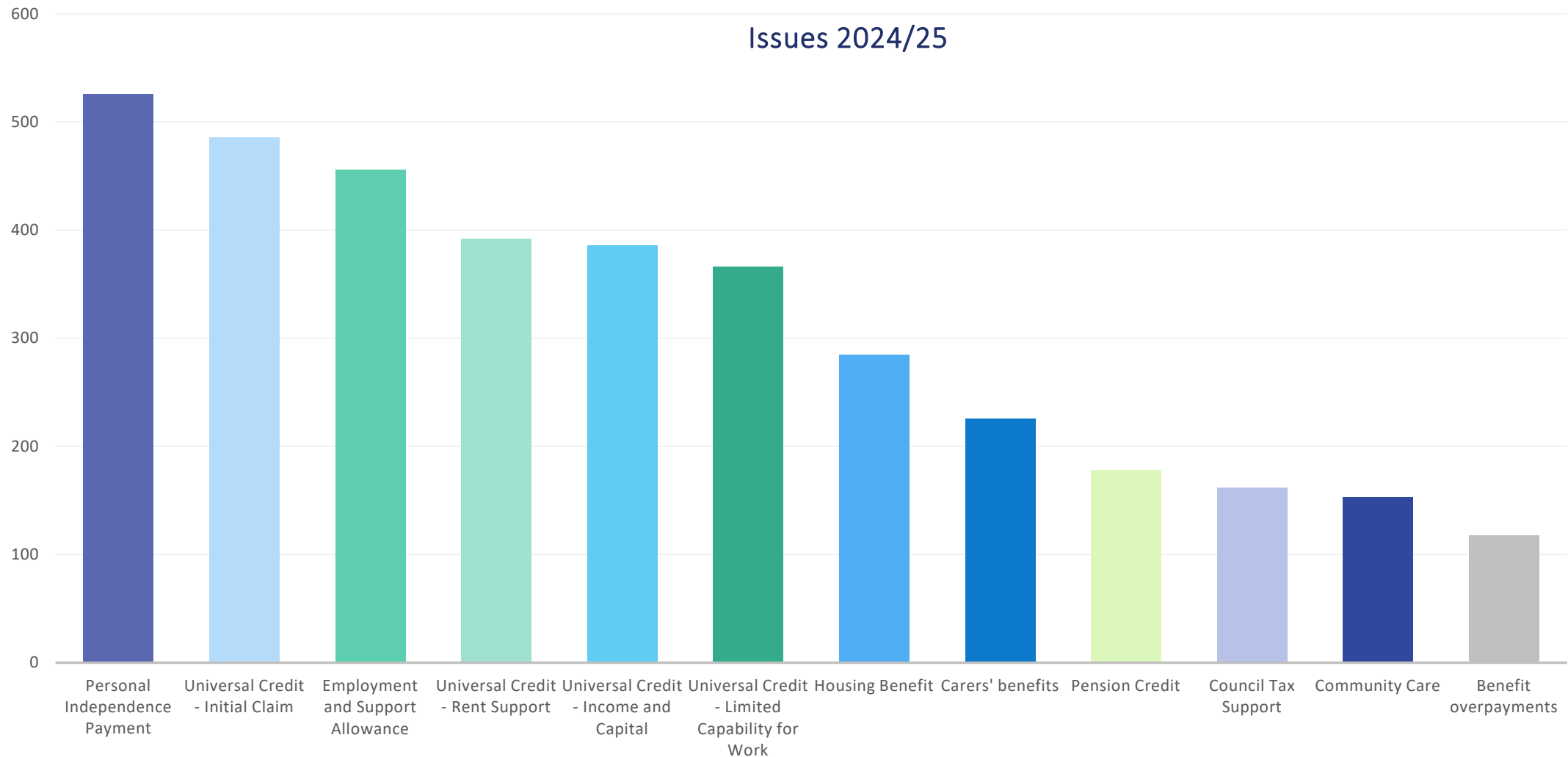


For every client that contacted us about **Personal Independence Payment**, these were the other issues we helped the client navigate

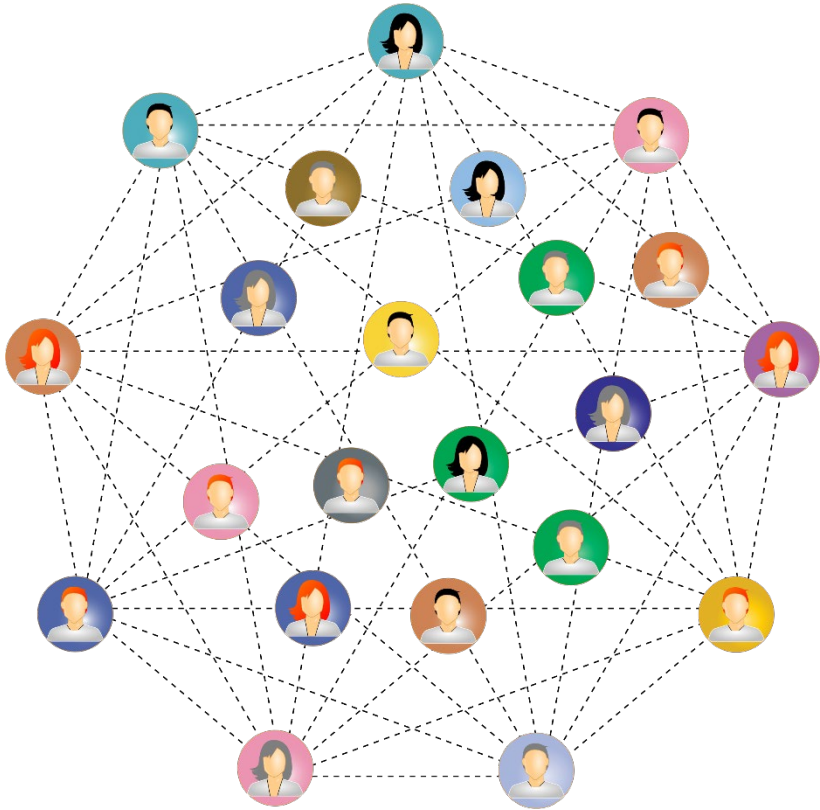
## Complexity of enquiries



# Key benefit problems



# In total our advice had this much value



**Financial Outcomes direct and indirect**  
**£3,368,025**  
**£401,631** confirmed client benefit gain

**Our Fiscal Benefit was £221,394**  
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 £2,865,123**  
Public Value: Improvements in health, well-being, participation and productivity.

## Headline figures:

Reducing use of NHS £61,929

Keeping people in work £81,885

Homelessness prevention savings  
£75,751

Fiscal benefit of supporting claimants  
with benefit debts £81,009

**For every £1 of funding we  
received our clients gained  
£11.11 and we created £9.45 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 demonstrated 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.

# Work Wise project



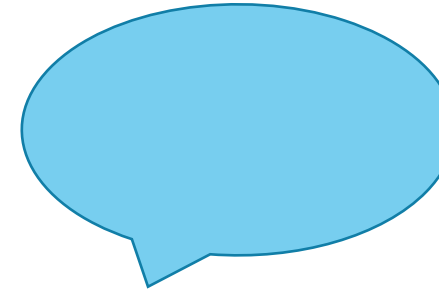
We were successful in bidding for a contract for a new advice service to support local employment support organisations delivering Work Wise – a DWP funded project being led by Surrey County Council, aimed at helping people with disabilities or a long-term condition with paid work options. We partnered with three local Citizens Advice to deliver benefits, housing and financial capability advice. The key aims of the service were to:

- Ensure compatibility of work opportunities and benefit work related rules
- Protect the clients' Limited Capability for Work/Work Related Activity where appropriate
- Provide full benefit checks and holistic benefit support to the household
- Support individuals to claim benefits if eligible
- Provide support during DWP roll out of managed migration to Universal Credit

## **In just one year we helped:**

- over 190 cases referred to the Work Wise advice service
- 824 issues advised on
- 70% of the advice on benefits - disability and sickness benefits and Universal Credit

# What they said.....



“Excellent service. I am very grateful for the assistance that you gave me, and the effort taken to resolve the situation”

Casework Client



“Service was outstanding. We were both lost and confused by the gobbledegook in the benefits application forms. Can’t thank you enough”

Casework Client



“I would never have been able to get to this stage of my life without you! So HUGE thanks and gratitude to you, I hope you realise what a wonderful service, support and assistance you give to so many people!”

Casework Client



“That's so helpful - very many thanks. I do NOT know what we would do without you all”

Local Citizens Advice Supervisor



“ I work with asylum seekers. I would advise anyone who is referring people to attend this training.”

Benefits Overview training delegate



“I wanted to thank you for your prompt reply to my enquiry and your kind assistance in identifying the clients' options and next steps.”

Advice Services Manager



I just wanted to say thanks again for another brilliant session on what is an incredibly complex topic. These benefits sessions are so beneficial to helping us help our clients.”

National Charity

# Training the advice sector

SWRU courses delivered **30**

Local advice workers trained **266**

Commissioned courses delivered **27**

Local staff and volunteers trained **474**

New courses included:

Benefits for Refugees

DLA for children – effective form filling

Limited Capability for Work – the Work Capability Assessment



<https://www.swru.org/training/>

# Working with others for better client outcomes

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

Jobcentre Plus

Surrey District and Borough councils

Citizens Advice –National Office

No-One Left Behind

Department of Work and Pensions

Surrey Welfare Advice Group

SCC Adult Social Care

Surrey Childrens Services

Cost of Living Partnership

Surrey Warm Hubs network

SCC Staff Carers network

Surrey Heartlands ICB Staff Carers  
network

# Who we are

## Staff

Maria Zealey – Chief Officer

Brigid Caffyn-Parsons – Welfare Rights Adviser

Karen Creeth – Welfare Rights Adviser

Carol Gibbs – Senior Welfare Rights Adviser

Lou Glencross – Parent and Carer Benefits Adviser

Helen Haws – Welfare Rights Adviser

Anna Kanisius – Welfare Rights Officer

Ken Lo – Finance and Business Support Officer

Fernanda Tuozzo - Welfare Rights Officer

Qin Zou – Finance Support Volunteer

## We would like to thank

Surrey County Council

Woking Borough Council

Our subscribers

## Trustees

Jane Bourgeois – Chair

Melanie Bussicott

Louise Fisher

Anne Haigh

Roger Hurcombe - Treasurer

Keith O’Neill – Vice-Chair

Jan-Pieter Oosterom

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  
IAA Registered  
AQS Standard in  
Welfare Benefits Casework