

# VOICES

VOICES  
OF  
INDEPENDENCE  
CHANGE &  
EMPOWERMENT IN  
STOKE-ON-TRENT

citizens  
advice

## A Model of Specialist Welfare Advice and Advocacy at VOICES

How VOICES and Citizens Advice Staffordshire North and Stoke-on-Trent have worked together to provide welfare rights support to people with multiple needs



JULY 2018

Independent evaluation report  
Naomi Pollard and Becky Rice

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# 1 Executive summary

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A Citizens Advice (CA) adviser in work and benefits from Citizens Advice Staffordshire North and Stoke-on-Trent (CASNS) is funded by VOICES and embedded full time in the VOICES team. This report presents the findings of a small-scale independent evaluation of this model of providing benefits advice to people with multiple needs. The findings are based on analysis of monitoring data, case studies and interviews with the CA Adviser, a VOICES Service Coordinator and the VOICES Director.

VOICES is funded through the Big Lottery Fund as part of the Fulfilling Lives programme; Stoke-on-Trent is one of 12 areas covered by the programme.

VOICES Stoke-on-Trent seeks to empower people with multiple needs such as mental ill-health, substance misuse and homelessness to change their lives and to influence services. The programme is aimed at testing alternative approaches to supporting people with multiple needs through casework and assertive advocacy to help people access services. Service Coordination is at the core of the programme.

## 1.1 The VOICES CASNS model

**The CASNS Adviser in work and benefits (the 'CA Adviser') works full time as part of the VOICES team. The CA Adviser has two main roles:**

- A frontline advice, support and advocacy role involving both direct casework with customers and supporting VOICES Service Coordinators to advise their customers.
- A learning, capacity-building and policy role including coaching, mentoring and supervising VOICES Service Coordinators in all benefits matters with the aim of them becoming benefits advocates in their own right, and delivering external training to teams working with people with multiple needs to raise awareness of the benefits issues facing their customers.

The nature of VOICES customers' needs can make ensuring they receive their full financial entitlement a complex task. The welfare and benefits expertise provided by the CA Adviser, directly through her casework and indirectly through her up-skilling of Service Coordinators, means all possible sources of entitlement are considered, including routine claims for personal independence payment (PIP) and employment and support allowance (ESA). The Adviser's expertise also facilitates customers' ability to challenge benefits decisions.

**Key elements of the embedded CA Adviser model are:**

- Full integration into the VOICES team, working closely with the Service Coordinator on each case.
- Flexibility within the CA Adviser's role to respond to the customers' needs and changing circumstances, as well as the evolving needs of the VOICES team, and external changes such as the introduction of universal credit.
- Full access to the VOICES data-recording system (to keep up to date with the customer's situation and update the system with benefits claims information).
- Being on site as part of the VOICES team to ensure consistency for customers and familiarity with and trust in the CA Adviser.
- Structural support from CASNS ensuring the CA Adviser's knowledge and expertise is continually updated.

 **67 customers** received an increase in average weekly income of...



The CA Adviser also works closely with the VOICES Director and management team, producing monthly reports and customer case studies, and working on policy issues.

Meeting the needs of this client group requires CA to use a different and more flexible service model. Flexibility has also allowed the role of the Adviser to evolve as the Service Coordinators have gained experience and confidence as benefits advocates. This flexibility is also facilitating the team's response to the recent rollout of Universal Credit in Stoke and its effects on VOICES customers.

### 1.2 Outcomes for customers

- Helping customers to access their financial entitlements is an essential element to addressing multiple needs and helping people make positive changes in their lives. Without benefits in place, some customers may rely on resources acquired through begging or petty crime and can also be very vulnerable to exploitation; acquiring a regular income can promote independence and positive engagement with services.
- The embedded CA Adviser model has enabled VOICES to achieve significant financial outcomes for customers. *For 67 customers who received advice, an increase in average weekly income of £176.19 was achieved*, most commonly through securing PIP or ESA.
- In many cases, these financial outcomes were achieved through the appeal of a

benefits decision, which would not have been possible without the input of the CA Adviser. VOICES has achieved a 100 per cent success rate in changing benefits decisions through appeals since the start of the project in October 2014.

- Successful appeals often result in a significant back payment – a lump sum which can have a transformative effect on a customer's life, as long as any necessary support is made available and the customer engages in that support to manage the money sensibly.

### 1.3 Wider benefits to Stoke-on-Trent

- *This report demonstrates access to more than £600,000 p.a. of previously unclaimed benefits for vulnerable residents in the city*; it is likely that a significant amount of this income is spent in local shops and businesses. It has been estimated that Stoke-on-Trent's share of the national amount of unclaimed benefits overall could be as high as £50 million annually.<sup>1</sup>
- Lack of income is a clear risk factor for petty acquisitive crime and begging. Ensuring people have an independent income is one of several ways in which VOICES service supports people to reduce their interactions with the criminal justice system, benefiting the wider community.<sup>2</sup>

**£600,000**



## 1.4 Outcomes for VOICES

*"The temptation is to internalise. Resist that temptation and use external experts who are linked into the professional development and legislative updates. If you recruit your own person, they will very quickly be out-of-date."*

**Andy Meakin,  
VOICES Director**

- The in-house CA Adviser has enabled VOICES to address issues relating to customers' benefits more effectively, including challenging benefits decisions to an extent that would not have been possible without an in-house expert.
- The CA Adviser's input permits Service Coordinators to focus on more immediate customer needs such as housing.
- The CA Adviser has supervised and mentored Service Coordinators to become skilled benefits advocates. Service Coordinators now have greater confidence to identify customers in need of assistance with benefits matters and consider the range of benefits for which customers may be eligible.
- The CA Adviser is able to identify where a customer needs other specialist advice and refer them onto CAB for support.

## 1.4 Outcomes for CASNS

- Having a CA Adviser embedded in the VOICES team means CASNS is able to provide direct advice to people who are traditionally 'hard to reach' through centre-based advice provision, such as rough sleepers.
- Customers who receive benefits advice via VOICES are more likely to access other advice services at CASNS independently.
- CASNS's greater contact with customers with multiple needs through VOICES increases the organisation's skills and expertise in this area through the CA Adviser's feedback to the team.

## 1.5 Recommendations

- Section 5 outlines a range of recommendations for those delivering and commissioning services for people with multiple needs. Headlines from these are:
- Commissioners and service providers should recognise the need for specialist benefits advice for people with multiple needs; barriers to accessing entitlements impede peoples' chances to lead more fulfilling lives.

- Organisations providing specialist support or service coordination for people with multiple needs should consider the model of embedding an independent specialist adviser from an expert advice organisation to provide benefits and employment advice, as opposed to attempting to deliver this service internally.
- Commissioners and other funders should ensure appropriate funding and commissioning of specialist welfare advice for people with multiple needs. Specialist benefits advice services should be flexible and a culture of learning and capacity building should be built into delivery.
- All organisations working with people with multiple needs in areas where Universal Credit (UC) has not yet been rolled out should plan for the forthcoming changes to the benefits system and consider taking steps such as providing supported access to computers and enhancing budgeting and benefits advice including assessing whether clients are better off on legacy benefits or UC.



## 2 Introduction

A CA Adviser in work and benefits from Citizens Advice Staffordshire North and Stoke-on-Trent (CASNS) is funded by VOICES and embedded full time in the VOICES team. This report presents the findings of a small-scale independent evaluation of this innovative model of providing welfare benefits advice to people with multiple needs.



The report is based on analysis of monitoring data, case studies and interviews with the CA Adviser, a VOICES Service Coordinator and a VOICES Director. It is intended for those with an interest in VOICES and also for anyone with an interest in enabling people with multiple needs to access benefits entitlements.

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### 2.1 About VOICES

VOICES is funded by the National Lottery through the Big Lottery Fund as part of Fulfilling Lives: Supporting people with multiple needs. The Fulfilling Lives programme is aimed at testing alternative approaches to supporting people with multiple needs. ***Stoke-on-Trent is one of 12 areas to share the £112 million funding over eight years.***

VOICES in Stoke-on-Trent seeks to empower people with multiple needs to change their lives and to influence services. It is a partnership project between a wide range of organisations and people with lived experience of multiple needs. Service Coordination is a key element of the VOICES project and is delivered by an operational team of nine Service Coordinators and two Systems Brokers. The team works with people with multiple needs such as mental ill-health, substance misuse and homelessness, which impact on their access to services and opportunities to flourish and progress. Part of

VOICES' mission is to change systems through casework and assertive advocacy to help people access appropriate services.

Central to all the work undertaken are the voices of those with lived experience of multiple needs. The Expert Citizens group, supported by VOICES, have formed their own community interest company and are central to the progress of change in the city and the legacy of the VOICES project.<sup>3</sup>

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### 2.2 Background to the partnership between CASNS and VOICES

A CASNS CA Adviser in work and benefits (hereafter referred to as the 'CA Adviser') works full time as part of the VOICES team. A service level agreement between Brighter Futures and the CASNS has been in place since the start of the VOICES project in 2014, and will run until the end of the project in 2022.

***"It was not a model we'd observed elsewhere. The idea really came from the observation that trying to provide internal expert advice doesn't work well and that things could be done differently."***

**Andy Meakin,  
VOICES Director**

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### 3 The VOICES CASNS model

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The model draws on an integrated approach to service delivery, which harnesses the expertise of another organisation to provide high-quality in-house specialist provision that could not otherwise be provided by a small organisation such as VOICES. By commissioning a CA Adviser to work with the team on a full-time basis, VOICES is able to tap into the expertise and infrastructure of CASNS, with access to the support network and continuing professional development (CPD) that is essential to ensure an adviser remains completely up-to-date with legislative and practical developments.

The model was incorporated into the original design for the VOICES service, and was developed from a floating support service provided by CASNS for Brighter Future's Smart Moves project. For that project, two part-time advisers offered advice on debt and benefits, taking referrals and offering some supervision and support for the Smart Moves advisers. It was felt that the capacity-building aspect of this model had great potential and should be a central element of the service-level agreement with VOICES.

*'Partnerships are usually on an outreach or referral basis. The key difference here is the capacity-building role – the advice and support that is given to VOICES Service Coordinators.'*

**Simon Harris,  
CEO, CASNS**

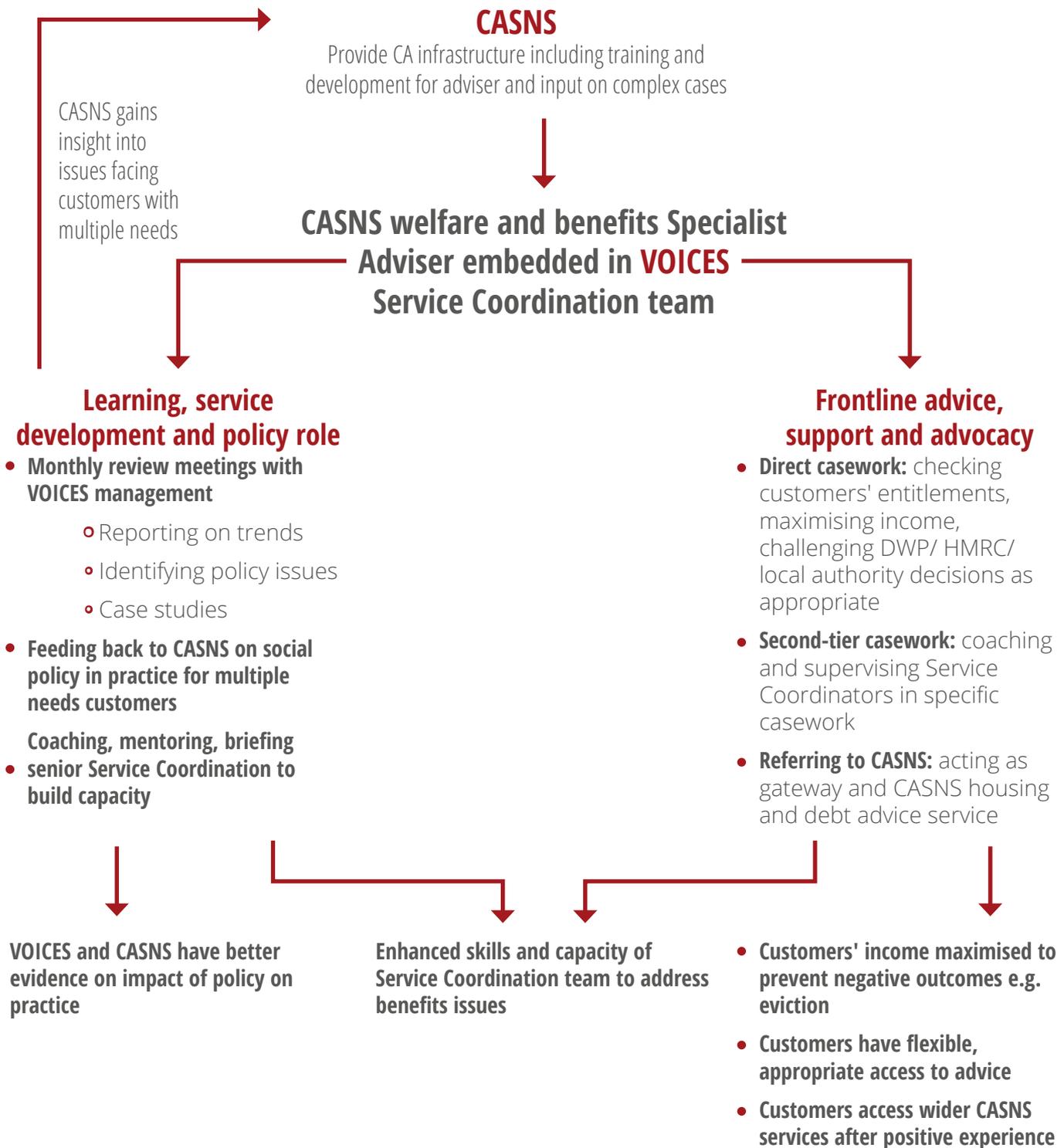
The CA Adviser has two main roles: a frontline advice, support and advocacy role for around three days per week and a learning, capacity-building and policy role for around two days per week. The CA Adviser is based at VOICES for half the week and CASNS for half the week. This arrangement is flexible, however, to accommodate the uncertainties inherent in working with customers with multiple needs.

Figure (a) provides an overview of the model and sections 3.1 to 3.3 provide more detail on key features of the model.

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## Figure (a) Model of Integrating a CA Adviser from CASNS within VOICES



### 3.1 Frontline advice, support and advocacy role

The frontline role of the CA Adviser involves direct casework, where the CA Adviser takes the lead in working with customers, and second-tier casework, where the CA Adviser supports VOICES Service Coordinators to advise their customers. The objectives of the CA Adviser's work are to:

- Ensure new customer's benefits entitlements are checked and that benefits are maximised.

Deal with issues related to customers' ongoing benefits entitlements and new claims.

- Ensure that decisions made by the Department for Work and Pensions (DWP), local authority and HM Revenue and Customs (HMRC) are challenged where appropriate at mandatory reconsideration.
- Act as customers' representative and advocate as appropriate, supporting both the customer and the Service Coordinator through the independent appeal process at both First-tier and Upper-tier Tribunals.
- Mentor and supervise Service Coordinators to increase capacity as skilled benefit advocates.
- Provide a full-time consultation service : face-to-face, email, telephone, and on site.

In addition the CA Adviser provides advice to Community Development Coordinators, Expert Citizens and Peer Mentors.<sup>4</sup>

The skills of the CA Adviser and the flexible approach to their work are key features of the role and are described in more detail below.

#### 3.1.1 Specialist welfare and benefits advice for customers with complex needs

A source of expert knowledge of welfare and benefits is essential to ensure VOICES customers and their Service Coordinators are able to manage the intricacies of receiving and maintaining the benefits to which they are entitled. The nature of VOICES customers' needs can make ensuring they receive their full financial entitlement a complex task. All new customers' benefits entitlements are routinely assessed. The depth and breadth of welfare and benefits knowledge provided directly by the CA Adviser, and indirectly through her up-skilling of Service Coordinators (see section 3.2.1), means all possible sources of entitlement are considered – for example, by making routine personal independence payment (PIP) and employment and support allowance (ESA) claims and exploring all relevant premiums. This high degree of expertise, as well as the capacity created by having an in-house specialist, also facilitates customers' ability to challenge benefits decisions through appeal and ultimately tribunal. VOICES has a 100 per cent success rate helping customers to overturn benefits decisions at tribunal.



<sup>4</sup> Community Development Coordinators ensure that there is an active community of volunteers that contribute towards the objectives of the VOICES project and work with other organisations to support the development and maintenance of their volunteer communities where these aim to offer opportunities for people with experience of multiple needs.

*"I just don't think we would have had the time or expertise to achieve these results without [the CA Adviser]."*

**Andy Meakin,**  
VOICES Director

The nature of customers' needs creates particular challenges to maintaining and managing claims. Customers who do not have an address or do not open letters, or do not understand or act on the content of letters, can quickly lose access to their entitlement. Customers with mental or physical health problems may need help acquiring sick notes so that benefits can be continued or restarted. If a customer is in and out of prison or hospital, they are likely to need assistance dealing with the consequences of this for their benefits claims. Much of this work requires the VOICES team to act as advocates for customers in their contact with DWP and other agencies.

*"We might deal with the consequences of customers for example, not completing the medical form before an ESA assessment because perhaps they haven't opened their post or haven't engaged with the contents of it. We have to liaise with DWP to ensure such customers are tagged as vulnerable and don't lose their entitlement to ESA as a result."*

**Karen Dunn,**  
CA Adviser

The structural support from CASNS is essential to delivering individually-tailored, high-quality welfare benefits advice. The CA Adviser's expert knowledge of current policy and practice is continually updated, ensuring that the basis for advice and support is always accurate and current. Spending part of the week at CASNS provides the opportunity for the Adviser to discuss complex cases with colleagues.

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### **3.1.2 Integrating the CA Adviser role with Service Coordination**

VOICES customers work with their own Service Coordinator over an extended period. The model of an in-house CA Adviser ensures first-rate welfare and benefits advice is offered as part of this relationship. The way the CA Adviser works with the Service Coordinator and their customers develops on a bespoke basis, depending on the specific circumstances and needs of the customer, as well as the experience and expertise of their Service Coordinator. The process by which customers are referred to the CA Adviser is flexible: Service Coordinators liaise with the Adviser informally about straightforward cases and escalate the more complex ones to the Adviser.

The model of Service Coordinators working in partnership with the CA Adviser means VOICES customers receive welfare and benefits advice within the context of the trusting relationship that has been established between the customer and Service

Coordinator. Because the CA Adviser is part of the VOICES team, many customers already know her or are reassured by the fact that she has been in the team for three years and has helped many other VOICES customers. This familiarity and trust is helpful in gaining customers' permission to advocate or challenge a benefits decision on their behalf. The fact that the CA Adviser works alongside Service Coordinators in the same office means they share a strong personal and professional rapport, which provides a firm basis from which to work together on behalf of customers.

The CA Adviser has full access to and use of VOICES own data recording-system; this avoids customers having to repeat their backstory to different members of the team, which can be especially uncomfortable when discussing the deeply personal details often required to make a claim for sickness or disability benefits. As part of the process of getting to know a new VOICES customer, the Service Coordinator completes a safety and wellbeing assessment (SAWBA) assessing their emotional wellbeing; physical health; risks associated with their substance misuse, behaviour, offending, homelessness/housing; the risks they may face from others; and their financial capability. This document is a key tool for the CA Adviser to understand a customer's background before preparing for the first meeting with them.<sup>5</sup>

*"If most of this information is held on their Safety and WellBeing Assessment (SAWBA), it goes a long way towards the aspiration of them not having to tell their story twice... It reduces the need for me to ask probing questions, making my assessment more of a conversation rather than subjecting the customer to a lengthy interview."*

**Karen Dunn,**  
CA Adviser

The CA Adviser having full access to the VOICES data-recording system also ensures a customer's benefits history is integrated into their records, which facilitates future access to previous claim forms and other vital information. The fact that the CA Adviser is based on site helps to create consistency for the customer and ensure that service provision is responsive to their changing circumstances. Familiarity with customers' cases means that as soon as a Service Coordinator becomes aware of a change in a customer's circumstances, the welfare benefits implications can be considered in partnership with the CA Adviser. This also means that well-grounded appeals to benefits decisions can be launched quickly.

The CA Adviser accompanies Service Coordinators on outreach and home visits to support customers who have complex needs such as problems due to mental ill-health or addiction, which may inhibit them from attending appointments in an office. The flexibility of the

CA Adviser's role means they can see customers face-to-face throughout the week if necessary, not just on the days she is based at the VOICES office; this also means that she can be contacted via phone and email throughout the week.

*"This flexibility is essential when working with customers with complex needs; they may only be available on certain days, or planned appointments might not work out because of the customer's immediate needs."*

**Karen Dunn,**  
CA Adviser

Having an in-house CA Adviser enables Service Coordinators to focus on addressing customers' other needs. In the initial stages of supporting a customer, the Service Coordinator can focus on the most immediate concerns, such as housing, while the CA Adviser leads on addressing benefits issues. Access to the data-recording system means the CA Adviser has information on customers' circumstances without consulting the Service Coordinators and her expertise ensures they do not waste time looking up welfare and benefits-related information.

*"Having Karen [the CA Adviser] has really made navigating the DWP and benefits system so much easier. I don't have to call CAB and be placed in a call queue to get an answer. Karen is there for everything."*

**Elena Casilli,**  
VOICES Service Coordinator



Additionally, the CA Adviser acts as a gateway for direct referrals to CASNS advice on topics such as housing and debt, which further contributes to support for customers in relation to a range of needs beyond their benefits entitlement.

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## 3.2 Learning, capacity-building and policy role

### 3.2.1. Building VOICES' and others welfare and benefits expert capacity

The CASNS CA Adviser builds the capacity of the VOICES team to offer high-quality advice and support about benefits and welfare to their customers. This entails coaching, mentoring, supporting, and supervising VOICES Service Coordinators in all benefits matters, with the aim of enabling them to become skilled benefits advocates in their own right. The flexibility of the model is essential to achieving this aim. The CA Adviser's role was focused on direct casework at the start of the project when some Service Coordinators had less confidence and expertise in supporting customers with benefits and welfare issues. Over the course of the project, Service Coordinators have worked in partnership with the CA Adviser on cases, so that they have gradually built up their own expertise and experience and consequently can now take the lead on many cases.

*"When I first started, [some of the team] weren't confident when for example, they were making a phone call to the DWP on a customer's behalf. As my role has evolved, [more] of the Service Coordinators can do this work, so I have less direct contact with customers."*

Karen Dunn,  
CA Adviser

As the team of Service Coordinators has become more experienced, the CA Adviser's role has evolved. Although she provides high levels of support and guidance to Service Coordinators who are less experienced, most of the team are able to independently assess the welfare and benefits needs of their customers and seek advice from the CA Adviser where necessary. The extent and nature of the input from the CA Adviser on each case is dependent on the nature and complexity of the case and the expertise and experience of the individual Service Coordinator. Increasingly, the caseload of the CA Adviser is focused on the most complex cases, primarily those involving appeals. Even in this highly-skilled aspect of benefits advocacy, the CA Adviser is mentoring Service Coordinators to start to take the lead in customers' appeals against benefits decisions. The extent and nature of her input evolves as a Service Coordinator's expertise and confidence builds.

*"My first ever PIP claim, Karen took the lead. The second one we worked together. The third one I took the lead and Karen provided guidance. I'm not quite ready to do one completely independently, but Karen knows that and I know what I need to work on."*

Elena Casilli,  
VOICES Service Coordinator

Two Service Coordinators are currently being mentored by the CA Adviser to become 'appeal champions', with the aim of taking the lead at every stage of the appeal process and representing their customer at tribunal level. As well as increasing VOICES' welfare benefits advice capacity and contributing to Service Coordinators' professional development, it is also beneficial for customers to have their Service Coordinator, with their in-depth knowledge of the customer's background and needs, involved as much as possible in their appeal especially at the hearing.

*"The Tribunal doesn't want to hear from me at this point; they want to hear from the customer and their support."*

Karen Dunn,  
CA Adviser

In order for Service Coordinators to help their customers access their full benefit entitlement, it is essential that they are well-informed about current welfare benefits policy and practice. A formal programme of training sessions on this topic is provided to VOICES staff and partners by CASNS. The CA Adviser builds on this by providing ongoing briefing and coaching for Service Coordinators about legislative and practical matters. Service Coordinators highlight the importance of having the CA Adviser on site; it means that they can check queries about current policy and practice immediately and in person.

The CA Adviser has worked with the VOICES Learning and Evaluation Manager to deliver tailored training sessions to the (Stoke-on-Trent Social Work annual professional development event). Three sessions held in 2017, with around 30 delegates a session, explored barriers and issues facing people with multiple needs in making and maintaining benefits claims.

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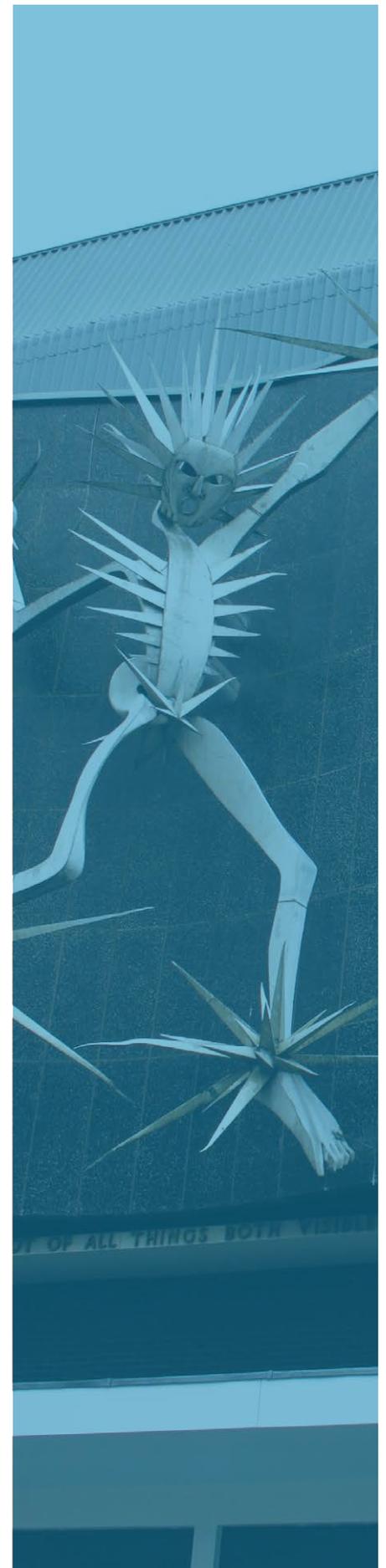
### 3.2.2 Working with the VOICES management team

The CA Adviser works closely with the VOICES Director and management team. She produces monthly reports and customer case studies, and identifies trends in how social policy issues are affecting customers on the ground. These form the basis of a monthly review meeting. The CA Adviser has also attended some of the VOICES Partnership Board Meetings,

regularly preparing reports and contributing items for discussion.

As Service Coordinators have been able to take on more of the frontline casework, the CA Adviser has been able to take on a more outward-facing role, sharing her expertise of supporting customers with complex needs externally. She does this through a range of external meetings and events, including exploring the particular issues raised for customers with complex needs by the rollout of Universal Credit at DWP meetings; helping to train social workers about the realities of navigating the benefits system as someone with multiple needs; and contributing to the development of the Child Poverty Action Group's early-warning system. The CA Adviser also regularly shares good practice via the VOICES blog, newsletter and website.

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## Case study: John



John experiences very serious problems due to mental ill health. He has self-medicated by injecting methamphetamines for more than 20 years. John has almost all of the indicators of heavy amphetamine use, including depression and feeling suicidal, weight loss, insomnia, repetitive behaviours and aggression. He struggles to interact with others and access services, which sometimes means he does not seek the medical help when he urgently needs to.

VOICES helped John to make a new PIP claim, and he was subsequently invited to attend an assessment. John was very distressed about having to attend the assessment, and required extensive support and coaching from his Service Coordinator in order to leave his property to attend. He was so anxious about the appointment that he was stuttering, shaking, and sweating. Almost as soon as the assessment began, John became extremely distressed and left the assessment room. The Service Coordinator was able to stay with the assessor to explain that his apparent rudeness and abandonment of the assessment were an indication of his extreme distress and anxiety around the meeting. The Service Coordinator then left the building and found John. She attempted to reassure him and to encourage him to go

back into the assessment but he was too distressed.

A decision refusing John the benefit was issued stating that he had 'failed to complete an assessment'. The Service Coordinator contacted DWP and explained what had happened, and VOICES submitted further supporting evidence. However, after mandatory reconsideration, the decision remained unchanged. It is not clear whether John received a copy of the decision letter, but VOICES, as his representative did not, and the time limit for his appeal lapsed before it could be made. With the help of the CA Adviser, John's Service Coordinator made a late appeal directly to the Tribunal.

VOICES also submitted a complaint on John's behalf asking that reasonable adjustments be made so that he could be allowed the opportunity to complete his claim for PIP. The complaint prompted another reconsideration of John's case, and he was subsequently assessed for PIP on the supporting information VOICES had provided. John was awarded the standard rate of PIP from the date of his claim, and a large back payment. The back payment has been used in part by John to secure accommodation.



## 4 Outcomes of the model

### 4.1 Outcomes for VOICES customers

Accessing benefits entitlements poses challenges for people facing multiple needs – for example, some people struggle to remember and attend assessments, open and read letters, or indeed even receive letters if they are homeless. Others may be reluctant to engage with the benefits system having had prior poor experiences. Helping customers to access their financial entitlements is an essential element to addressing multiple needs. Prior to referral, some customers may rely on resources acquired through begging or petty crime such as shoplifting; securing their benefits entitlement can therefore be a step towards reducing customers' interaction with the criminal justice system. Some customers are vulnerable to exploitation because of their lack of resources and acquiring a regular income can promote independence and engagement with services.

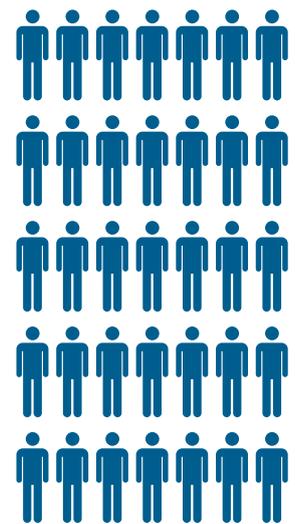
*"There is a big fall in people's interaction with the criminal justice system when they have contact with our Advisers, and a big part of this is getting them the benefits they're entitled to."*

**Andy Meakin,**  
VOICES Director

The embedded CA Adviser model has enabled VOICES to achieve impressive financial outcomes for customers. Figure (b) and (c) provide an overview of the financial gain for VOICES customers achieved through the CA Adviser model. One-off financial gains are the total received through benefits back payments (see later in this section for more on back payments). The figures for total weekly and annual financial gain are based on the assumption that customers continued to claim the benefits entitlements secured by VOICES over a year. In some cases the CA Adviser or a Service Coordinator will have provided ongoing support and troubleshooting to assist with this.

Since the start of the project in October to 2014, 67 customers have been provided with advice. *Of this group, 35 customers have received back payments totalling £110,857; an average of £3,167 per person. More importantly perhaps, the average weekly income secured was £176.19*

**35 of 67  
Customers**



**received back  
payments totalling  
£110,857**



**£3,167**  
per person

## Figure (b) Financial gains through benefits entitlements for all VOICES customers (1st October 2014 to 31st July 2018)

	Number of customers advised	Total one-off financial gain for all customers	Total ongoing annual financial gain for all customers
Oct-14 to Jul-18	67	£110,857	£613,860

## Figure (c) Average individual financial gains through benefits entitlements for VOICES customers (1st October 2014 to 31st July 2018)

	Number of customers advised	35 customers received a one-off financial gain Average one-off financial gain	Average ongoing financial gain per customer (weekly)	Average ongoing financial gain per customer (annually)
Oct-14 to Jul-18	67	£3,167.34	£176.19	£9,162

Monitoring data shows that by far the most common financial gain was through securing PIP or ESA. This work would often centre on calculating the customer's eligibility and entitlement (including relating to daily living skills and mobility), dealing with a change in circumstances, and challenging and appealing

decisions. Smaller numbers of customers were assisted with council tax reduction and housing benefit. In addition, individuals were supported with claims for jobseeker's allowance, attendance allowance, and carer's allowance (one or two people in each case).

## Figure (d) Average individual financial gains through PIP and ESA entitlements for VOICES customers (1st October 2014 to 31st July 2018)

	Number of customers advised	Total income gain for all customers advised	Average ongoing annual gain per customer
Employment Support Allowance	45	£375,887	£8,353
Personal Independence Payment	41	£290,124	£7,076

VOICES has achieved a 100 per cent success rate in changing benefits decisions at tribunal appeal hearings since the start of the project in October 2014. In comparison, 63 per cent of PIP appeals and 60 per cent of ESA appeals were successful nationally between 2013 and 2017.<sup>6</sup> Section 3 explores the features of the model that contribute to this high degree of success.

A successful appeal often results in significant back payments being awarded to the customer. Back payments are made for the period before an ongoing claim is set up; the rules vary for different benefits and situations. In some cases a back payment is limited to one month's worth of income; in other situations a back payment might constitute the full amount the claimant would have received had the claim been processed immediately. A lump sum payment can have a transformative effect on a customer's life – for example, one VOICES customer recently used a benefits back payment

to buy a houseboat, providing him with a permanent home.

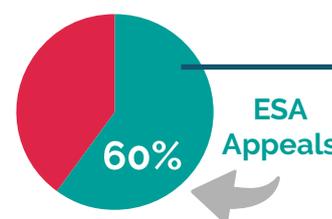
Large back payments can also create problems for customers. There is the potential for large amounts of money to be spent quickly – for example, some VOICES customers with substance abuse problems have used the money to binge on drugs or alcohol. Other customers have been susceptible to exploitation having received a back payment, for example by being manipulated to gift or lend money by associates, friends or family.<sup>7</sup>

VOICES high rates of success at appeal tribunal mean that Service Coordinators are now experienced in helping customers plan how to manage their back payments. They offer to help customers assess their financial priorities and draw up a payment plan that considers whether a lump sum or payment in instalments would be most beneficial to them. Customers are also advised to carefully consider with whom they share information about

# VOICES



**Success rate in changing benefit decisions at tribunal appeal hearings**



**Were successful nationally between 2013 and 2017**

<sup>6</sup> DWP Commons Select Committee (2018) Report on PIP and ESA assessments: [publications.parliament.uk/pa/cm201719/cmselect/cmworpen/829/82908.htm](https://publications.parliament.uk/pa/cm201719/cmselect/cmworpen/829/82908.htm) (accessed July 2018)  
<sup>7</sup> VOICES case studies explore the problems created by back payments in more detail: [youtu.be/es6FIVGB-js](https://youtu.be/es6FIVGB-js)



the back payment. VOICES is considering developing a toolkit for financial capability support.

Even when possible sources of financial entitlement turn out to be unsuccessful, customers benefit from a sense that VOICES is there to support them.

*"Even when something doesn't work out, they feel that they have someone on their side; for a lot of customers, that's the first time that's been the case."*

**Karen Dunn,**  
CA Adviser

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#### **4.2 Outcomes for VOICES**

Having a CASNS CA Adviser embedded in-house gives VOICES access to an expert resource that it would not have been able to provide internally.

*"The temptation is to internalise. Resist that temptation and use external experts who are linked into the professional development and legislative updates. If you recruit your own person, they will very quickly be out-of-date."*

**Andy Meakin,**  
VOICES Director

With the CA Adviser on hand to provide advice directly to customers or to support Service Coordinators with their cases, VOICES is able

to address issues relating to customers' benefits more effectively. The model enables VOICES to help customers to challenge benefits decisions to an extent that would not be possible without the support of an in-house expert. This resource also permits Service Coordinators to focus on more immediate customer-needs such as housing.

The embedded CA Adviser has supervised and mentored Service Coordinators to become skilled benefits advocates. Consequently, Service Coordinators now have greater confidence to identify customers in need of assistance with benefits matters and, are able to consider the full range of benefits for which customers may be eligible. They are also able to provide realistic advice to customers about benefits entitlements and can arrive at an informed view of customers' capability for work, and, to self-care and get around. As Service Coordinators grow in confidence, they are increasingly able to work independently as benefits advocates, for example preparing paperwork and attending tribunals. VOICES' work and benefits expertise is being further enhanced because some Service Coordinators are being mentored to become appeals champions who can lead cases through the appeals process.

Another positive outcome of the model has been that the CA Adviser has been able to help volunteers with their benefit and debt issues, which has enabled a number of

them to address issues that were impeding their ability to volunteer.

An additional benefit of the model is that the CA Adviser is able to identify the need for other specialist support that could benefit customers. As a result, it is hoped that a specialist CAB housing adviser will soon also be embedded within VOICES. The success of the model has led VOICES to consider the possibility of harnessing the expertise of other partnership organisations in similar integrated approaches to service provision. VOICES is interested in working more collaboratively with the health sector, for example, in relation to supported housing and preventative work and aftercare with homeless customers, as well as drug and alcohol services.

*"No single supplier has a handle on all the levers needed to deliver what commissioners are requesting. Doing that requires partners to work hand-in-glove together."*

**Andy Meakin,**  
VOICES Director

.....  
**4.3 Outcomes for CASNS**

CASNS has identified a number of benefits from having a CA Adviser embedded in the VOICES team. Firstly, the model is a very effective means of extending the organisation's capacity. This is done through:

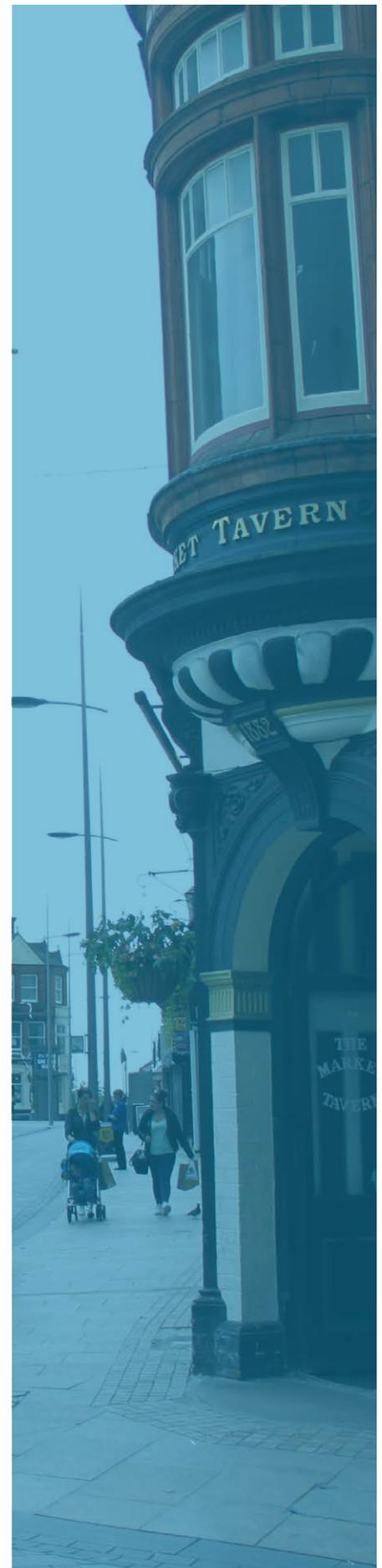
- CASNS being able to provide direct advice to those traditionally 'hard to reach' through outreach and centre-based advice provision – for example, people who are sleeping rough or have substance abuse problems.
- Customers who receive benefits advice via VOICES being more likely to access other advice services at CASNS independently, when previously they may not have considered attending the service.
- CASNS being able to contribute to the development of the workforce of those providing a specialist, multiple needs service, increasing the organisation's impact
- CASNS's greater contact with customers with multiple needs increasing the organisation's skills and expertise in this area through the CA Adviser's feedback to the team.

*"It boosts capacity by cascading expertise; many more people benefit from CAB's knowledge and expertise than if an Adviser was just taking referrals."*

**Simon Harris,**  
CEO, CASNS

Testing the embedded Adviser model at VOICES has enabled CASNS to develop a way of working that other organisations, such as Stoke on Trent Community Drug and Alcohol Service, have expressed an interest in commissioning.

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#### 4.4 The model's flexibility

A flexible and fluid approach to service provision is a central tenet of the model of an embedded CASNS CA Adviser. VOICES and CASNS agree that the focus of the Adviser's work should be on achieving outcomes for the customer rather than sticking to standard practice; it is often necessary to step outside CAB's usual way of working to meet the needs of VOICES customers.

*"Finding a partner comparable with your values and approach is essential. The arrangement will succeed or otherwise on the relationship with the host organisation. Everyone needs to make concessions in order for the relationship to work."*

**Simon Harris,  
CEO, CASNS**

As explored in section 3.2, the flexibility of the model has allowed the role of the CA Adviser to evolve as the Service Coordinators have gained experience and confidence in their role as benefits advocates. This flexibility is also facilitating the adaptations in the team's roles in response to the rollout of Universal Credit in Stoke, since June 2018, and its effects on VOICES customers. It is anticipated that the CA Adviser will need to resume spending more time on direct casework, providing intensive support for customers and Service Coordinators.

VOICES expects the majority of customers to be moved over to Universal Credit quickly because of their regularly changing circumstances. The fact that access to Universal Credit is both made and managed online by default is expected to create challenges for VOICES customers who may be unable to access a secure internet connection from home or, digitally excluded because of a lack of familiarity with digital technology. In anticipation of these issues, the CA Adviser has arranged a room with a secure internet connection at Hanley CAB to be available for VOICES customers to use for one day each week.

Other aspects of Universal Credit that are expected to contribute to a significant increase in VOICES' welfare benefits caseload include, the impact of customers having to budget a month at a time and pay their landlords directly, as well as the increased workload associated with customers having to renew on a monthly basis their permission for VOICES to advocate on their behalf via the Universal Credit online journal.



## Case Study: Jason

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Jason suffers from severe anxiety, depression, and paranoia, which has affected his ability to access services. He is heroin dependent and uses other substances as a form of self-medication.

VOICES helped Jason make a new claim for PIP, which was refused. VOICES submitted a mandatory reconsideration on his behalf but the original decision remained unchanged. VOICES then lodged an appeal directly with Her Majesty's Courts and Tribunals Service (HMCTS). VOICES received a copy of the appeal papers from DWP, including a copy of the health professional's report from the face-to-face assessment.

VOICES became very concerned about some of the statements within the health professional's report because they did not appear to reflect the reality of Jason's needs. The report included phrases such as: 'he appeared well nourished and well kept'; 'he displayed appropriate interaction verbally and non-verbally with good eye contact during the assessment'. Jason's Service Coordinator confirmed that the assessment had lasted 30 minutes at most and that Jason had been highly anxious and withdrawn throughout. The health professional appeared content to accept the 'yes/no' answers offered by Jason and did not explore these statements further – even when those statements contradicted their observations of Jason at the meeting, what he had

said on his claim form and the nature of his stated conditions. The Service Coordinator and other workers describe Jason as 'skeletal' and noticeably malnourished, and report that he struggles to maintain his personal hygiene.

These inaccuracies and contradictions raised significant doubts about the validity of the report. The DWP decision-maker chose not to seek any further medical or other professional input about Jason despite cited mental health and substance misuse issues. VOICES was hopeful of success before an independent First-tier Tribunal.

However, in the meantime Jason returned to prison for eight months. Now recently released, VOICES has supported him to make a new Universal Credit claim. VOICES will help him to make a new claim for PIP when he is ready to do so. The appeal hearing for Jason's initial PIP claim is still pending, and VOICES believes that he could be eligible for a large lump sum of backdated PIP. The potential safeguarding issues this is likely to create means he will need significant support and advice if and when he receives a back payment.



# 5 Conclusions and recommendations



## 5.1 Conclusions

- VOICES' customers face barriers to accessing their benefits entitlements, which impacts on their access to essential resources and services, and leaves them vulnerable to exploitation and exclusion.
- The integrated CA Adviser post is central to the service that the VOICES team provides to its customers.
- It is highly unlikely that VOICES staff could provide the level of expertise that the CASNS staff member has.
- Customers benefit directly from personalised and flexible support to claim benefits and resolve issues with benefits, including making successful appeals.
- Income from benefits awarded with the assistance of the CA Adviser changes lives; access to a basic income can be a foundation for accommodation, independence and making positive life changes.
- The additional income claimed is also likely to be beneficial to Stoke-on-Trent more widely. This report demonstrates access to more than £600,000 p.a. of previously unclaimed benefits for vulnerable residents in the city. It is likely that a significant amount of this income is spent in local shops and businesses. It has been estimated that Stoke-on-Trent's share of the national amount of unclaimed

benefits could be as high as £50 million annually.<sup>8</sup>

- The model has increased the experience and expertise of CASNS in working with people with multiple needs, a group often hard to engage via traditional models of advice provision.
- The model builds capacity and confidence in the Service Coordination team to assist customers with benefits issues.
- The CA Adviser has also worked with the VOICES Learning and Evaluation Manager to deliver training to social work teams.
- Having a fully embedded CA Adviser role means that VOICES is far better prepared for the roll out of universal credit than it would otherwise have been. The work of the Adviser will be vital in supporting customers and the Service Coordination team during this challenging period and in helping the leadership of the organisation communicate to DWP locally and nationally about the impact of the new system.

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## 5.2 Recommendations

### Recognising the need for specialist benefits advice for people with multiple needs.

- Organisations working with people with multiple needs should ensure that their service offer includes access to benefits advice. This is relevant to a range of sectors including health, social care, criminal justice, housing and homelessness.
- Organisations providing specialist support or service coordination for people with multiple needs should consider the model of embedding an independent adviser from an expert advice organisation to provide benefits and employment advice, as opposed to attempting to deliver this service with internally.

### Appropriate funding and commissioning of specialist welfare advice for people with multiple needs

- Provision of advice to people with multiple needs should be resourced in a way that reflects the complexities of this work – for example, the need to make appeals, deal with changing circumstances and build trust with a customer over time.
- Embedded CA Advisers should have the flexibility to work creatively with people facing multiple needs who may require a different

service response from those accessing more generic advice services.

- Contracts to embed staff should be flexible and allow for learning and development, rather than having very specific targets that would be hard to change as the model evolves.

### Delivering high-quality specialist welfare advice to people with multiple needs

- A cycle of learning should be encouraged in models of embedded specialist advice where both organisations learn from each other and capacity building is a recognised aim of the role, as opposed to the adviser working in a purely customer-facing role.
- All organisations working with people with multiple needs in areas where universal credit has not yet been rolled out should plan for the forthcoming changes to the benefits system, and consider taking steps such as providing supported access to computers and enhancing budgeting and benefits advice including assessing whether clients are better off on legacy benefits or UC (especially relevant around tax credits).

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**VOICES**

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