

REGISTERED COMPANY NUMBER: 03335128 (England and Wales)
REGISTERED CHARITY NUMBER: 1062826

Report of the Trustees and
Unaudited Financial Statements
for the Year Ended 31 March 2025
for
Surrey Welfare Rights Unit

Barnes Noble Ltd
Unitec House
2 Albert Place
London
N3 1QB

Surrey Welfare Rights Unit

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Surrey Welfare Rights Unit

Reference and Administrative Details
for the Year Ended 31 March 2025

TRUSTEES

Mrs J V Bourgeois -Chair
Mrs P L Fisher
Mrs A C Haigh
Mr R S Hurcombe - Interim Treasurer from 29.04.24
Mr K D O'Neill
Mr S J O'Sullivan - Treasurer to 29.04.24 (resigned
4.11.24)
Mr J-P Oosterom
Mrs A M Pirie
Mrs S Sankarasubramanian
Mrs M J Bussicott (appointed 4.11.24)

REGISTERED OFFICE

Unit 14a Monument Way East
Woking
Surrey
GU21 5LY

**REGISTERED COMPANY
NUMBER**

03335128 (England and Wales)

**REGISTERED CHARITY
NUMBER**

1062826

INDEPENDENT EXAMINER

Barnes Noble Ltd
Unitec House
2 Albert Place
London
N3 1QB

Surrey Welfare Rights Unit

Report of the Trustees for the Year Ended 31 March 2025

The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31 March 2025. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

Surrey Welfare Rights Unit exists to provide a welfare rights advice service within the county of Surrey and surrounding area. The service is accessed by voluntary and statutory sector professionals, who in most cases are the first point of contact for clients needing advice.

The Unit provides an independent and confidential service. This independent status allows membership of Citizens Advice (the operating name of the National Association of Citizens Advice Bureaux) and the Unit abides by the Aims and Principles of the Citizens Advice service. This also allows for flexibility to develop and change, and gives the freedom to benefit from joint working projects. Furthermore, independent charitable status gives the Board of Trustees the power to seek alternative sources of funding to protect the level of services going forward. This will ensure that the range of welfare rights services can be developed and improved for the future.

The core tasks of the service are:

- To provide an advice line for the use of the professional staff and volunteers from our networks;
- To provide training courses on welfare benefits for, amongst others, Local Citizens Advice, statutory and voluntary organisations;
- To influence the development of social policies and services and to ensure individuals do not suffer through a lack of knowledge or an inability to express their needs effectively;
- To produce information and publicity on welfare rights issues for both professional staff and, when relevant, the people of Surrey;
- To promote the take-up of welfare benefits especially among the frail and vulnerable;
- To provide a source of expertise on social care issues in Surrey;
- To take on a limited amount of casework as appropriate and provide Tribunal representation in complex cases; and
- To be a focal point of welfare rights work across the region through support groups, seminars and informal talks, Social Policy work and networking.

Surrey Welfare Rights Unit

Report of the Trustees for the Year Ended 31 March 2025

Continued

During the 2024/25 year the continued roll-out of the Universal Credit Managed Migration programme dominated our incoming enquiries. The transitional rules put in place to protect existing claimants at the point of moving onto Universal Credit are hugely complex and vulnerable to error and misunderstanding. We supported our partners to deal with Managed Migration cases by providing training, peer support and taking on complex cases. Apart from Universal Credit, Personal Independence Payment and Employment and Support Allowance were the two benefits that advisers mostly sought support on. The benefits system is more complex for people with disabilities or long-term conditions due to the subjective nature of medical assessments.

We delivered a number of projects during the year. Funding from the Household Support Fund allowed us to provide additional specialist support and training to the local Citizens Advice network. Our successful Parent Carer Moving into Adulthood project ran for a third year. The delivery goals included a comprehensive web-based information resource for Carers on young people aged 14-25 who have a disability or a health condition. We believe this to be the only resource of this kind: <https://www.swru.org/moving-into-adulthood/>.

We also were successful in securing a DWP-funded contract with Surrey County Council to deliver a new advice service for Work Wise, a county-wide project helping people with a disability or health condition find paid employment. Although we held the main contract, we partnered with three local Citizens Advice for us to deliver not only benefits advice, but housing advice and financial capability.

Our research and campaigning work continued during this year. We hosted policy teams from Citizens Advice and kept local politicians and officers up to date with our newsletter and briefings on welfare reforms.

Surrey County Council continues to provide core financial support for the Unit, recognising the quality and cost effectiveness of work undertaken by the Unit. The Directors are very grateful for this support, and would also like to thank our landlords, Woking Borough Council. Within the County Council, we support the Care Leavers Teams, Financial Assessments and Deputyships team, Children with Disabilities, and the Home School Link Workers network. We also support the Housing Team at Reigate and Banstead Council, and the Refugee Support teams at Guildford and Waverley Councils.

As we head towards a huge reorganisation of all the local Councils we will strive to protect welfare rights support to vulnerable households across the whole county of Surrey.

We continue to hold 100% passes in all areas of our Citizens Advice Performance Quality Framework, including financial management and governance, and hold the Advice Quality Standard (AQS) Quality Mark in Casework. We are also registered with the Financial Conduct Authority and the Immigration Advice Authority.

Apart from grant funding, we continued to generate vital income streams from training courses, consultancy and subscriptions. 40 local organisations continued to subscribe to the Unit's services, and in particular, for our advice support on individual complex benefit cases. 57 courses were delivered during the year.

Public benefit

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Unit during the year. The Trustees are satisfied that the information provided in the report and accounts meets the public benefit reporting requirements.

The Trustees confirm that they have complied with the requirements of section 17 of the Charities Act 2011 to have due regard to the public benefit guidance published by the Charity Commission for England and Wales.

Surrey Welfare Rights Unit

Report of the Trustees for the Year Ended 31 March 2025

FINANCIAL REVIEW

Financial position

Incoming resources in the year were £356,586 (2024: £293,451). A surplus of £50,847 was made in the year (2024: £46,152). At 31 March 2025 total reserves were £295,699 (2024: £244,783) of which £294,009 represented unrestricted general funds (2024: £243,162). The projected budget at the start of the 2024/25 financial year showed a small deficit. The outturn was enhanced by unexpected additional grants from Surrey County Council, increased bank interest and training income, with reduced payroll costs because of sickness absence.

Principal funding sources

The trustees extend their gratitude to Surrey County Council and those Borough and District Councils who continued to support the core operating capacity of the charity.

We should particularly like to thank Woking Borough Council for providing premises at no financial cost to the charity except for charges for utility and other office services. The charity did not have any borrowings from either providers of funding or other sources at the statement of financial position date.

We received further funding to continue the Parent Carer project "Moving into Adulthood" and funding for the Work Wise Project. We also received additional specific funding from Surrey County Council as detailed in the statement of charitable activities.

Reserves policy

The Trustees have forecast the level of free reserves (that is those funds not tied up in fixed assets, designated and restricted funds) the Charity will require to sustain its operations. The Trustees consider that the most appropriate level of free reserves at 31 March 2025 is a minimum of six months' running costs. Whilst the current level of reserves may prove sufficient, it is the Trustees' view that it is prudent to ensure that there are sufficient free reserves to provide financial flexibility for future years and that identified needs in the County can continue to be adequately resourced. The budgeted expenditure for the forthcoming year is currently adequately covered by the agreed sources of income. As with previous years, efforts will be made to secure additional funding. The current free reserves will be used if necessary to support the work of the Unit should they be needed in the unlikely event of change of circumstances.

When considering the level of free reserves the Trustees have considered the Charity Commission document "Charity reserves: building resilience (CC19)" and also the House of Commons Public Administration and Constitutional Affairs Committee report "The collapse of Kids Company: lessons for charity trustees, et al". It is recognised that by far the greater part of the Charity's activity and expenditure is of an "essential" rather than of a "discretionary" nature. This requires a greater degree of financial resilience than for many other charities. The Trustees are also aware that no service level agreements or contracts are in place for more than one year and income that might be considered "core" is in any case insufficient to provide a basic service to the community and reliance has to be placed on subscriptions, fundraising and the securing of project income that can share the Charity's fixed costs. The Trustees are also mindful of considerable uncertainty regarding future funding from local government pending the outcome of the current reorganisation proposals.

The reasons for holding particular reserves are outlined in note 13.

Funds in deficit

No funds were in deficit at the statement of financial position date.

Surrey Welfare Rights Unit

Report of the Trustees for the Year Ended 31 March 2025

FUTURE PLANS

We currently are waiting to hear what the new Council structures will look like, so that we can plan how our networks and stakeholders will engage with us into the future. For our clients, we know that there are significant changes coming to Universal Credit, notably for claimants who are unable to work because of poor health or a disability. Future changes to Personal Independence Payment have not been scrapped, but instead are subject to a fundamental review by Stephen Timms MP. Further cuts to the welfare system will be devastating for low income families in our area, who have already had to cope with over a decade of cuts to benefits at a time when food prices and energy costs have skyrocketed.

We will be delivering extra support with funding from the final year of Household Support Fund, and will be engaging with the emerging Connect to Work services that are currently being set up locally to support people moving into work. Our experience of delivering the Work Wise contract demonstrates that early advice in any employment support scheme, improves job take up and sustainability of work.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

Surrey Welfare Rights Unit is a registered charity and a company limited by guarantee. The maximum liability of each member is limited to £1. At 31 March 2025 the company had 9 members (2024: 9). Surrey Welfare Rights Unit is governed by a Memorandum and Articles of Association as amended in 1999, 2005, 2011, 2019 and 2024. Surrey Welfare Rights Unit was incorporated as a company limited by guarantee on 18 March 1997. The charity commenced operations on 12 June 1997.

Recruitment and appointment of new trustees

The Trustees have suitable policies to ensure the Board has adequate representation. They identify any need to recruit and what competences, backgrounds, personal or professional, are preferred so that the Unit's governance reflects the communities it serves. The Board takes account of equality and diversity issues and recognises that these rights are critical to the Unit's credibility and enhances the Unit's profile with stakeholders, funders and campaigners. The Board is made up of 6 female trustees and 3 males. Several Trustees are in paid employment, and the Board has representation from non-white, non-British Trustees. The Board is actively implementing an Equalities, Diversity and Inclusion plan which includes recruitment as well as service delivery.

Newly appointed Trustees are provided with a comprehensive induction to Surrey Welfare Rights Unit through the provision of training courses and mentoring by established Trustees, as well as provision of a bespoke Trustee Handbook.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

A Trustee Board governs Surrey Welfare Rights Unit. The Board is responsible for setting the strategic direction of the organisation and the policy of the charity. The Trustees carry the ultimate responsibility for the conduct of Surrey Welfare Rights Unit and for ensuring that the charity satisfies its legal and contractual obligations. Trustees meet as a minimum quarterly and delegate the day-to-day operation of the organisation to senior management. The Trustee Board is independent from management.

The Board has two supporting committees, for staffing and for finance, comprising three or four trustees. The committees meet at least quarterly before the main trustee meeting, and consider detailed relevant matters which are then referred to the Board for final decisions.

The Trustee Board regularly conducts internal skills audits, and annually reviews its performance. It has updated its approach to risk management and reviews critical risks at each meeting. The Trustees also meet separately to review the Charity's strategy, and before finalising this, seek input from the staff. The Board is independently assessed by Citizens Advice using a comprehensive Performance Quality Framework that looks at areas of governance such as finance, strategic business planning and partnership working.

Internal control

The Board oversees the information security of all personal information of our clients, staff, funders and strategic partners that is processed. The Unit holds joint responsibility for client data that is held in the case management system, with the national Citizens Advice service. An information assurance management team exists to ensure the confidentiality, integrity and availability of all personal and sensitive data is maintained to a level which is compliant with the requirements of the General Data Protection Regulation and Data Protection Act 2018.

Register of interests

The Unit holds a register of interests for all Trustees. This is referred to and checked at each Board Meeting. During the year there were no declarations that impaired or conflicted with any Board decisions taken.

Related parties

Surrey Welfare Rights Unit is a member of Citizens Advice, the operating name of the National Association of Citizens Advice Bureaux, which provides a framework for standards of advice and casework management as well as monitoring progress against these standards. Operating policies are independently determined by the Trustee Board of Surrey Welfare Rights Unit in order to fulfil its charitable objects and comply with the national membership requirements.

The charity also co-operates and liaises with a number of other advisory services, local charities and Council departments on behalf of clients. Where one of the

Trustees holds the position of Trustee/Director of another charity they may be involved in discussions regarding that other charity but not in the ultimate decision-making process.

Surrey Welfare Rights Unit

Report of the Trustees
for the Year Ended 31 March 2025

Approved by order of the board of trustees on 20 October 2025 and signed on its behalf by:

A handwritten signature in black ink, appearing to read 'J V Bourgeois', written in a cursive style.

Mrs J V Bourgeois - Trustee

Independent Examiner's Report to the Trustees of
Surrey Welfare Rights Unit

Independent examiner's report to the trustees of Surrey Welfare Rights Unit ('the Company')

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2025.

Responsibilities and basis of report

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under Section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under Section 145(5) (b) of the 2011 Act.

Independent examiner's statement

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by Section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of Section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities (applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



Romit Basu FCA
The Institute of Chartered Accountants in England and Wales

Barnes Noble Ltd
Unitec House
2 Albert Place
London
N3 1QB

20 October 2025

Surrey Welfare Rights Unit

Statement of Financial Activities
(Incorporating an Income and Expenditure Account)
for the Year Ended 31 March 2025

	Notes	Unrestricted funds £	Restricted fund £	31.3.25 Total funds £	31.3.24 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		257	-	257	206
Charitable activities	3				
Charitable activities		195,144	149,713	344,857	285,317
Investment income	2	11,471	-	11,471	7,928
Total		<u>206,872</u>	<u>149,713</u>	<u>356,585</u>	<u>293,451</u>
EXPENDITURE ON					
Charitable activities	4				
Charitable activities		155,220	149,150	304,370	246,206
Other		805	494	1,299	1,093
Total		<u>156,025</u>	<u>149,644</u>	<u>305,669</u>	<u>247,299</u>
NET INCOME		50,847	69	50,916	46,152
RECONCILIATION OF FUNDS					
Total funds brought forward		243,162	1,621	244,783	198,631
TOTAL FUNDS CARRIED FORWARD		<u>294,009</u>	<u>1,690</u>	<u>295,699</u>	<u>244,783</u>

The notes form part of these financial statements

Surrey Welfare Rights Unit

Balance Sheet
31 March 2025

	Notes	Unrestricted funds £	Restricted fund £	31.3.25 Total funds £	31.3.24 Total funds £
CURRENT ASSETS					
Debtors	11	21,153	-	21,153	9,790
Cash at bank		377,126	1,690	378,816	302,416
		<u>398,279</u>	<u>1,690</u>	<u>399,969</u>	<u>312,206</u>
CREDITORS					
Amounts falling due within one year	12	(104,270)	-	(104,270)	(67,423)
		<u>294,009</u>	<u>1,690</u>	<u>295,699</u>	<u>244,783</u>
NET CURRENT ASSETS					
		<u>294,009</u>	<u>1,690</u>	<u>295,699</u>	<u>244,783</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>294,009</u>	<u>1,690</u>	<u>295,699</u>	<u>244,783</u>
NET ASSETS		<u>294,009</u>	<u>1,690</u>	<u>295,699</u>	<u>244,783</u>
FUNDS	13				
Unrestricted funds				294,009	243,162
Restricted funds				1,690	1,621
TOTAL FUNDS				<u>295,699</u>	<u>244,783</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2025.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2025 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

The notes form part of these financial statements

Surrey Welfare Rights Unit

Balance Sheet - continued
31 March 2025

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved by the Board of Trustees and authorised for issue on 20 October 2025 and were signed on its behalf by:

A handwritten signature in black ink, appearing to read 'J V Bourgeois', written in a cursive style.

Mrs J V Bourgeois - Trustee

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Taxation

The charity is exempt from corporation tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

Pension costs and other post-retirement benefits

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

Notes to the Financial Statements - continued
for the Year Ended 31 March 2025

2. INVESTMENT INCOME

	31.3.25	31.3.24
	£	£
Bank Interest Received	<u>11,471</u>	<u>7,928</u>

3. INCOME FROM CHARITABLE ACTIVITIES

	Unrestricted funds	Restricted funds	Total 2025	Total 2024
	£	£	£	£
Grant Income				
Surrey County Council	143,634	33,622	177,256	209,857
Surrey Borough and District Councils	-	2,000	2,000	10,000
Grants - COVID-19 C19 A BEIS	-	-	-	300
Grants other	-	29,091	29,091	22,190
	<u>143,634</u>	<u>64,713</u>	<u>208,347</u>	<u>242,347</u>
Subscription Income	24,345	-	24,345	22,640
Training Income	23,505	-	23,505	16,670
Rent in Kind	3,300	-	3,300	3,300
Consultancy	360	-	360	360
Work Wise		85,000	85,000	-
	<u>51,510</u>	<u>85,000</u>	<u>136,510</u>	<u>42,970</u>
Total	<u>195,144</u>	<u>149,713</u>	<u>344,857</u>	<u>285,317</u>

Notes to the Financial Statements - continued
for the Year Ended 31 March 2025

4. CHARITABLE ACTIVITIES COSTS

	Unrestricted funds £	Restricted funds £	Total 2025 £	Total 2024 £
Website costs	2,664	1,632	4,296	216
Trade subscription	1,464	897	2,362	2,290
Books and publications	1,374	879	2,253	1,978
Computer services and maintenance	2,326	1,477	3,803	3,732
Nominal rent	2,046	1,254	3,300	3,300
Insurance	1,420	871	2,291	2,199
Training programme costs	387	237	624	624
Printing, postage and stationery	388	238	626	2,317
Telephone and fax	1,565	959	2,524	2,466
Office and travel expenses	909	559	1,468	1,652
Staff development and other staff related costs	978	599	1,577	752
Trustee development	30	12	42	65
Wages and salary costs	139,668	85,604	225,272	224,615
Work wise partner payments		53,932	53,932	
	155,220	149,150	304,370	246,206

5. SUPPORT COSTS

	Finance £	Governance costs £	Totals £
Other resources expended	120	1,179	1,299

Support costs, included in the above, are as follows:

Governance costs

	31.3.25 Other resources expended £	31.3.24 Total activities £
Independent Examiners Fees	945	960
Accountancy fees	200	-
Legal fees	34	13
	1,179	973

Notes to the Financial Statements - continued
for the Year Ended 31 March 2025

6. NET INCOME/(EXPENDITURE)

Net income/(expenditure) is stated after charging/(crediting):

	31.3.25	31.3.24
	£	£
Independent Examiners Fees	945	960

7. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2025 nor for the year ended 31 March 2024.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2025 nor for the year ended 31 March 2024.

8. STAFF COSTS

The average monthly number of employees during the year was as follows:

	31.3.25	31.3.24
	8	8
Employees		

No employees received emoluments in excess of £60,000.

9. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted funds £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	206	-	206
Charitable activities			
Charitable activities	179,375	105,942	285,317
Investment income	7,928	-	7,928
Total	187,509	105,942	293,451
EXPENDITURE ON			
Charitable activities			
Charitable activities	140,615	105,591	246,206
Other	635	458	1,093
Total	141,250	106,049	247,299

Notes to the Financial Statements - continued
for the Year Ended 31 March 2025

9. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - continued

	Unrestricted funds £	Restricted fund £	Total funds £
NET INCOME/(EXPENDITURE)	46,259	(107)	46,152
RECONCILIATION OF FUNDS			
Total funds brought forward	196,903	1,728	198,631
TOTAL FUNDS CARRIED FORWARD	<u>243,162</u>	<u>1,621</u>	<u>244,783</u>

10. TANGIBLE FIXED ASSETS

	Computer equipment £
COST	
At 1 April 2024 and 31 March 2025	<u>18,543</u>
DEPRECIATION	
At 1 April 2024 and 31 March 2025	<u>18,543</u>
NET BOOK VALUE	
At 31 March 2025	<u>-</u>
At 31 March 2024	<u>-</u>

11. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.3.25 £	31.3.24 £
Trade debtors	19,443	9,790
Prepayments	1,710	-
	<u>21,153</u>	<u>9,790</u>

Notes to the Financial Statements - continued
for the Year Ended 31 March 2025

12. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.3.25 £	31.3.24 £
Trade creditors	12,940	1,252
Social security and other taxes	6,515	7,599
Accruals and deferred income	59,245	40,007
Accrued expenses	25,570	18,565
	<u>104,270</u>	<u>67,423</u>

13. MOVEMENT IN FUNDS

	At 1.4.24 £	Net movement in funds £	Transfers between funds £	At 31.3.25 £
Unrestricted funds				
General fund	141,433	50,847	(3,324)	188,956
Designated	101,729	-	3,324	105,053
	<u>243,162</u>	<u>50,847</u>	<u>-</u>	<u>294,009</u>
Restricted funds				
Restricted	1,621	69	-	1,690
	<u>244,783</u>	<u>50,916</u>	<u>-</u>	<u>295,699</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	206,872	(156,025)	50,847
Restricted funds			
Restricted	149,713	(149,644)	69
	<u>356,585</u>	<u>(305,669)</u>	<u>50,916</u>

Notes to the Financial Statements - continued
for the Year Ended 31 March 2025

13. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1.4.23 £	Net movement in funds £	Transfers between funds £	At 31.3.24 £
Unrestricted funds				
General fund	123,260	46,259	(28,086)	141,433
Designated	73,643	-	28,086	101,729
	<hr/>	<hr/>	<hr/>	<hr/>
	196,903	46,259	-	243,162
Restricted funds				
Restricted	1,728	(107)	-	1,621
	<hr/>	<hr/>	<hr/>	<hr/>
TOTAL FUNDS	<hr/> <hr/> 198,631	<hr/> <hr/> 46,152	<hr/> <hr/> -	<hr/> <hr/> 244,783

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	187,509	(141,250)	46,259
Restricted funds			
Restricted	105,942	(106,049)	(107)
	<hr/>	<hr/>	<hr/>
TOTAL FUNDS	<hr/> <hr/> 293,451	<hr/> <hr/> (247,299)	<hr/> <hr/> 46,152

Redundancy fund - Redundancy reserves have been designated by the Trustees for the purpose of covering potential redundancy costs in the event of a significant reduction in the income of the Unit that could result in closure. £3,324 has been allocated in the current year, making the total funds £58,053.

Information Technology Fund - An amount of £7,000 has been designated by the Trustees for the purpose of providing for replacement and upgrade of computer systems approaching the end of their working life and for the development of a replacement website.

Contingency Fund - An amount of £40,000 (2024 - £40,000) has been designated by the Trustees for the purpose of providing for possible relocation expenses and rental, business rates and service costs for one year should it be necessary to move from the existing offices currently provided at below current market rental values. The increase reflects the well-publicised financial pressures facing the current landlords.

14. EMPLOYEE BENEFIT OBLIGATIONS

Defined contribution pension scheme

The charity operates a defined contribution pension scheme. The scheme is open to all employees at any time. The company contributes 6% of pensionable earning. The pension cost charge for the year represents contributions payable by the charity to the scheme and amounted to £10,910 (2024 £11,264).

15. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2025.

Surrey Welfare Rights Unit

Detailed Statement of Financial Activities
for the Year Ended 31 March 2025

31.3.25
£

31.3.24
£

INCOME AND ENDOWMENTS

Donations and legacies

Donations 257 206

Investment income

Bank Interest Received 11,471 7,928

Charitable activities

Surrey County Council - Other 33,622 40,000

Surrey County Council - Core 143,634 136,405

Surrey Borough & District Coun 2,000 10,000

Surrey County Council - Parent 29,091 33,452

Grants - 22,190

Work Wise 85,000 -

Training Income 23,505 16,670

Subscription Income 24,345 22,640

Consultancy 360 360

Rent in Kind 3,300 3,300

Grants BEIS - 300

344,857 285,317

Total incoming resources 356,585 293,451

EXPENDITURE

Charitable activities

Wages 201,871 200,809

Social security 12,492 12,542

Pensions 10,910 11,264

Insurance 2,291 2,199

Telephone 2,524 2,466

Postage and stationery 626 2,317

Staff development and Other staff related costs 1,577 752

Trustee Development 42 65

Training Programme 624 624

Office and Travel expenses 1,468 1,652

Computer expenses 3,803 3,732

Books & Publications costs 2,253 1,978

Subscriptions 2,361 2,290

Website Costs 4,296 216

Carried forward 247,138 242,906

This page does not form part of the statutory financial statements

Surrey Welfare Rights Unit

Detailed Statement of Financial Activities
for the Year Ended 31 March 2025

	31.3.25 £	31.3.24 £
Charitable activities		
Brought forward	247,138	242,906
Work wise partner payments	53,932	-
Nominal rent	3,300	3,300
	<hr/>	<hr/>
	304,370	246,206
 Support costs		
Finance		
Bank charges	120	120
 Governance costs		
Independent Examiners Fees	945	960
Accountancy fees	200	-
Legal fees	34	13
	<hr/>	<hr/>
	1,179	973
 Total resources expended	<hr/>	<hr/>
	305,669	247,299
 Net income	<hr/>	<hr/>
	50,916	46,152

This page does not form part of the statutory financial statements

**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**

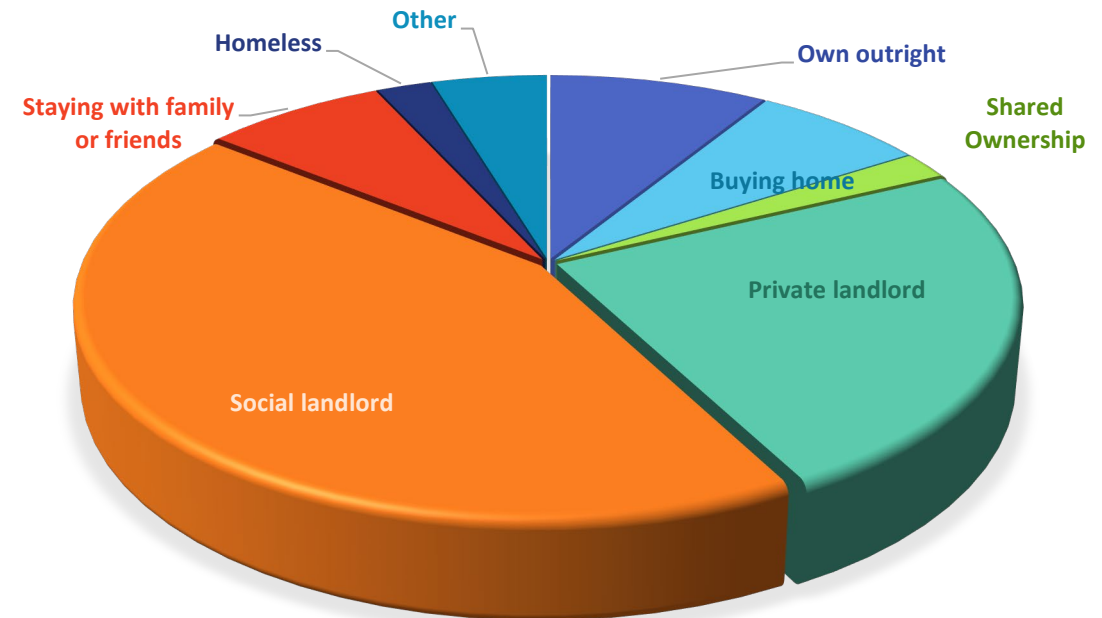
We helped those most in need

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.

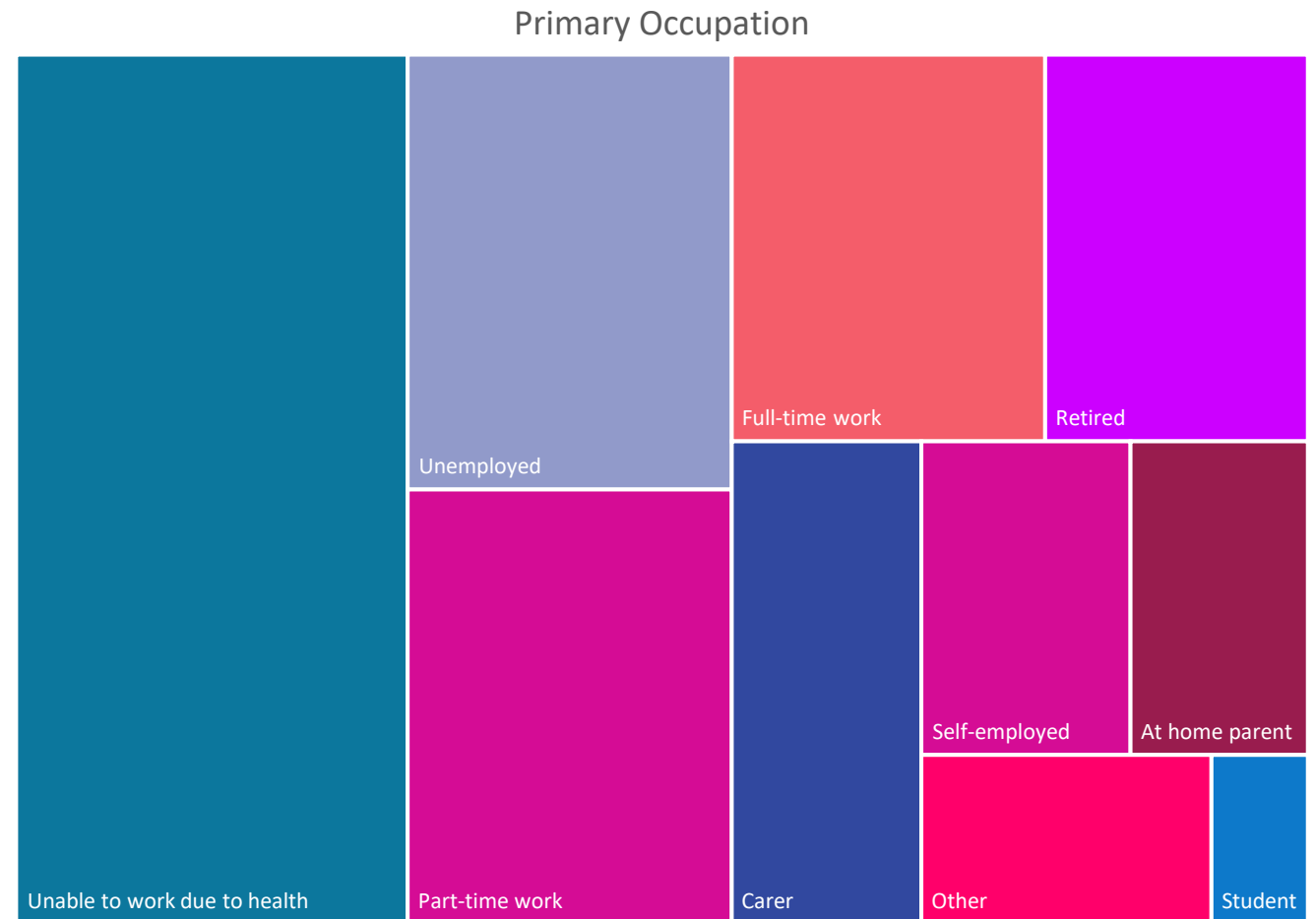
10% of our clients self-declared as non-White British, and 21% were non- British.

Over 20 different nationalities were recorded.



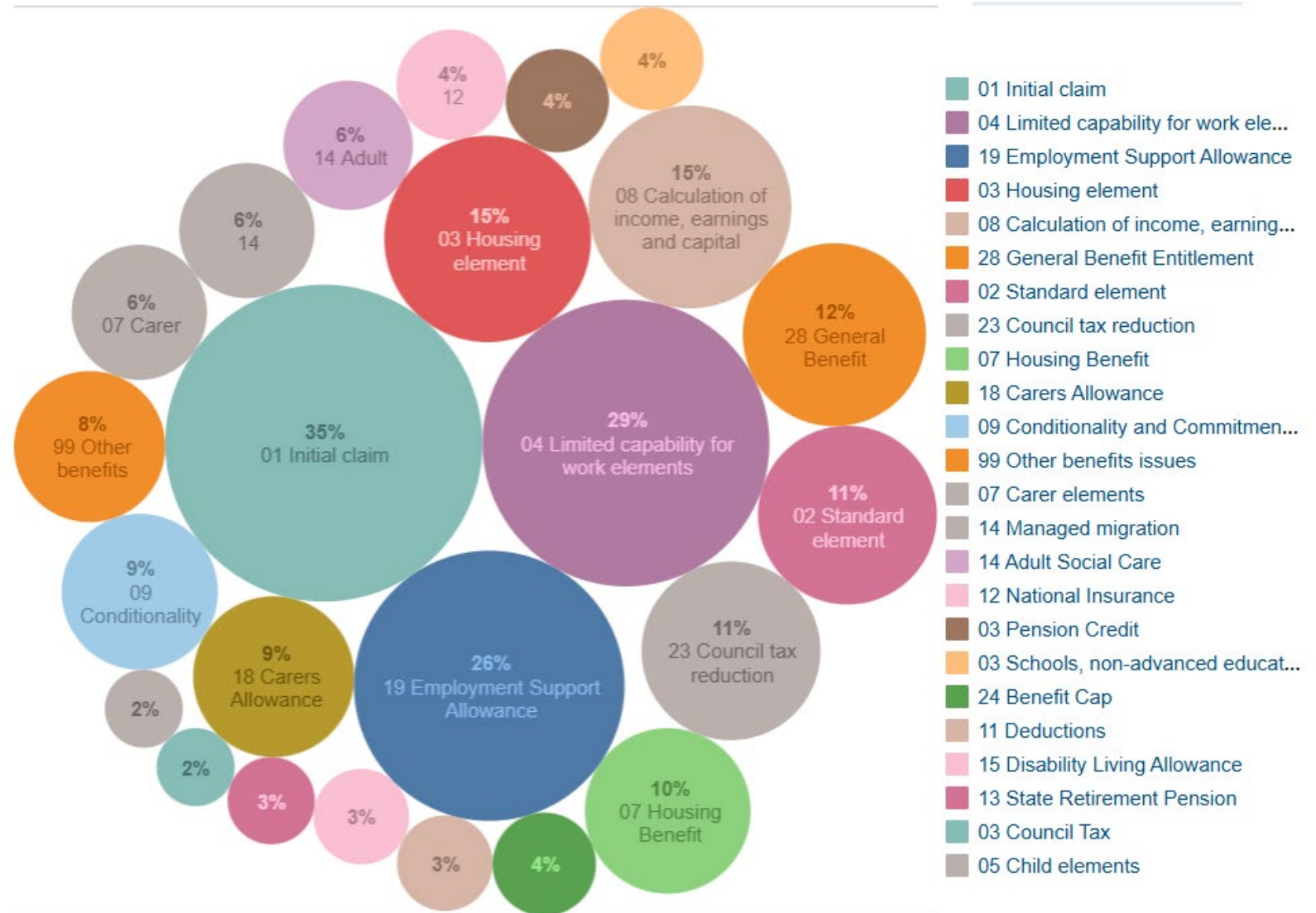
We helped those most in need - continued

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 5th year.

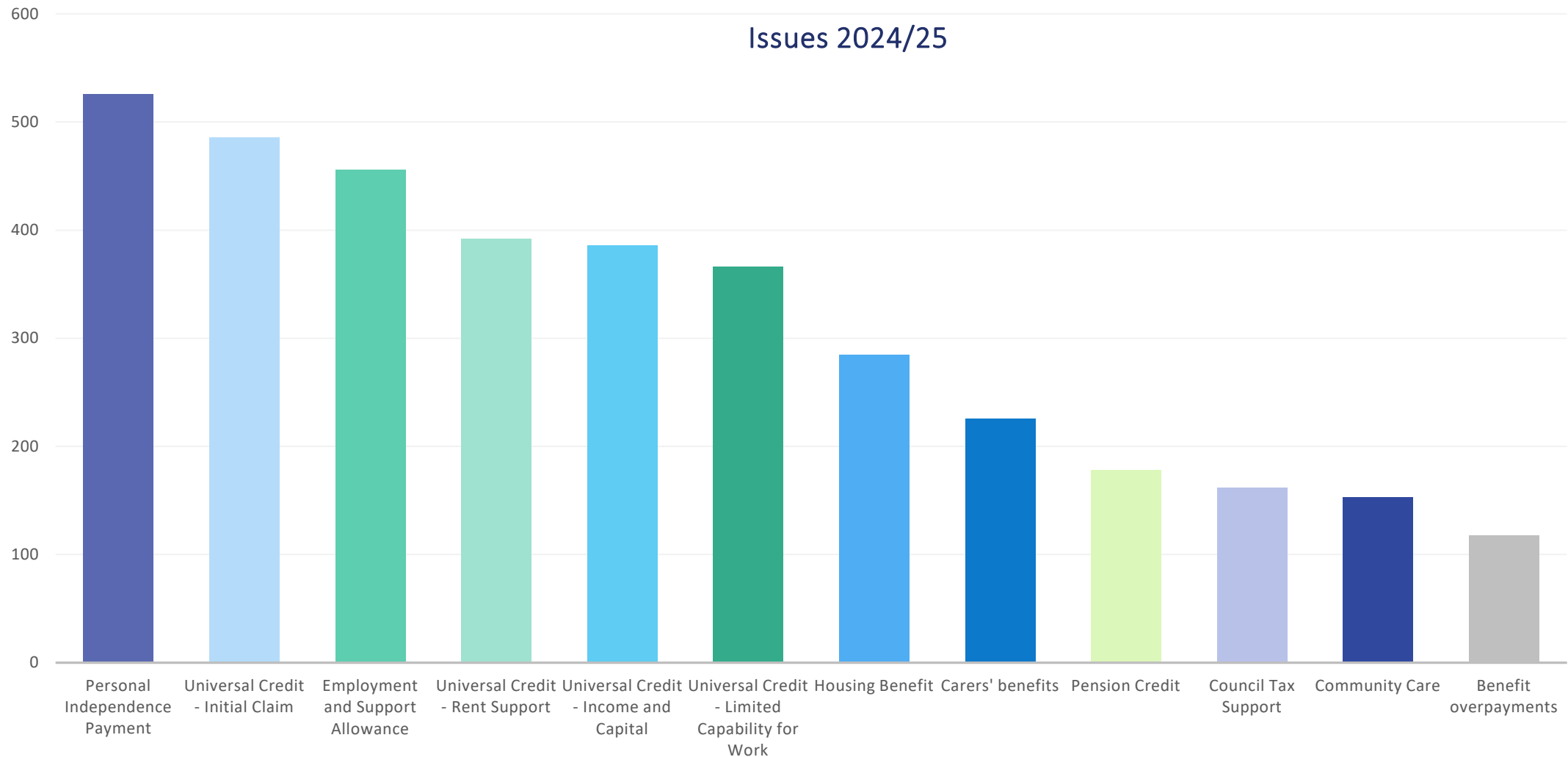


For every client that contacted us about **Personal Independence Payment**, these were the other issues we helped the client navigate

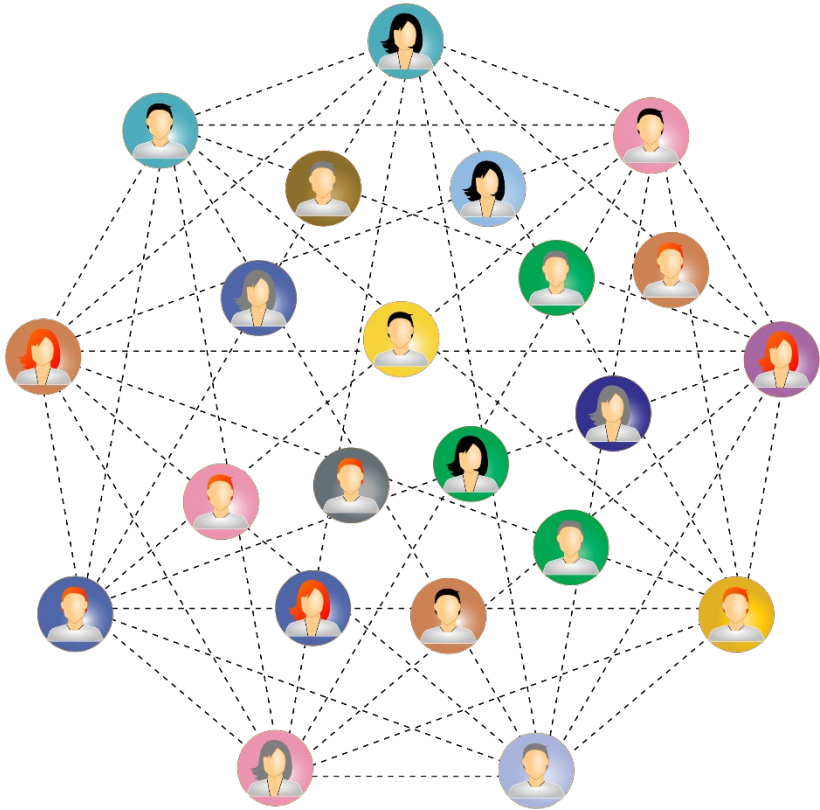
Complexity of enquiries



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



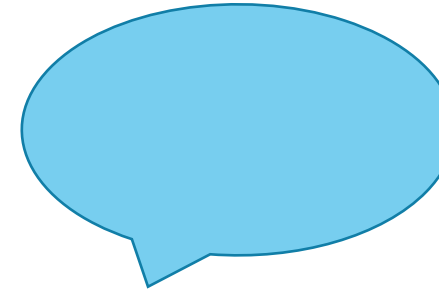
We were successful in bidding for a contract for a new advice service to support local employment support organisations delivering Work Wise – a DWP funded project being led by Surrey County Council, aimed at helping people with disabilities or a long-term condition with paid work options. We partnered 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