



Guidance on Special Guardianship Order Allowances and Support London Borough of Merton

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The Context of Special Guardianship Support Services

The local authority must make provision for a range of Special Guardianship support services.

Special Guardianship support services are defined as:

- a) Financial Support;
- b) Services to enable children, Special Guardians and parents to discuss matters relating to the arrangements for the child;
- c) Assistance including mediation in relation to contact between the child and their parents, relatives or significant others;
- d) Therapeutic services for the child;
- e) Assistance to ensure continuance of the relationship between the child and the Special Guardian, including training to meet any special needs of the child, respite care, and mediation;
- f) Counselling, advice and information.

Special Guardianship Support will be subject to the approval of the Director, Children's Schools and Families.

Contact details: Merton Civic Centre, London Road, Morden SM4 5DX

Support services should not be seen in isolation from mainstream services and it is important to ensure that families are assisted in accessing mainstream services and are aware of their entitlements to tax credits and social security benefits.

Where the child was previously Looked After, the local authority that looked after the child has responsibility for providing support for the first two years after the making of a Special Guardianship Order. Thereafter the local authority where the Special Guardian lives will be responsible for the provision of any support required.

Legal Framework

The Special Guardianship Regulations 2005 specify the conditions for providing Special Guardianship Support services including the provision of financial support.

In summary the provisions for financial support include:

- Reg 6 - outlines the circumstances in which financial support can be paid;
- Reg 7 - remuneration for former foster parents;
- Reg 8 - specifies the circumstances where an allowance may be paid; and in all other cases by a single payment;
- Reg 9 - specifies when financial support arrangements should cease;
- Reg 10 - specifies the conditions for which the adoptive parent must agree before an special guardian allowance is paid;

Reg 11 - specifies the information that must be taken into the account when undertaking an assessment of a persons need for financial support. In particular it stipulates the circumstances where means testing must be undertaken and when it is within the discretion of the Council to decide if means testing is appropriate;

Reg 12 – specifies the assessment of person’s needs for Special Guardianship support services they must have regard to considerations as are relevant to the assessment;

Reg 13 - specifies the assessment of need for financial support;

Reg 14 – specifies the plan for financial assessment;

Reg 15 – specifies the notice of proposal for the as to Special Guardianship Support services;

Reg 16 - specifies notification of decision as to a Special Guardianship support services;

Reg 17 – specifies the arrangements for reviewing an Special Guardianship Allowances.

Please find Statutory Guidance link below – the Special Guardianship Regulations 2005 http://www.legislation.gov.uk/uksi/2005/1109/pdfs/uksi_20051109_en.pdf

The Special Guardianship (Amendment) Regulations 2016. The regulations amend the Special Guardianship Regulations 2005 with regards to the matters to be considered when preparing reports for court in applications for SGOs. Please see guidance link below.

<http://www.legislation.gov.uk/uksi/2016/111/made>

Financial Support to Former Foster Carers

Regulation 7 of the Special Guardianship Regulations 2016 makes specific provision in regard to financial provision for special guardians who were formerly foster carers for the specific child or young person. The general principal underpinning the regulations is that financial support should not include any element of remuneration but that foster carers are exempted from this for a period of up to 2 years. In London Borough Merton the decision to continue paying former foster carers an allowance which is commensurate with fostering payments either for the first 2 years or beyond will be guided by an individual assessment of the child’s needs. The decision to approve continued payments will be made by the Assistant Director, Children’s Social Care and Youth Inclusion.

Financial Support to Prospective SGO Applicants (not former foster carers)

Regulation 6 of the Special Guardianship Regulations 2005 states that ‘financial issues should not be the sole reason for an SGO arrangement failing to survive’. The principle underpinning the regulations and guidance is that financial support should be available to ensure that financial aspects are not an obstacle. Regulation 13 outlines the expectation that Special Guardians should access the benefits that they are entitled to and that the role of local authorities is to be facilitative in this proves. It also stipulates that any financial support made to special guardians under these circumstances should not duplicate any other payment that they receive. The areas that the local authority is required to consider as part of a financial assessment are;

- a) The financial resources – including investments of the (prospective) Special Guardian;
- b) Outgoings of the prospective Special Guardian;
- c) Financial needs of the child or young person.

How Payments are Calculated

In considering the above areas London Borough Merton will assess the financial circumstances of any special guardian or proposed special guardian using a means test model developed by the Department of Education and Skills. The financial information that is required for the means test should be gathered using the Financial Assessment Form which is attached to this document in the Practitioner's Tool Kit as Appendix 1.

The Financial Assessment Form captures information about the Special Guardians total monthly household and family incoming finance and outgoing expenditure.

Once the financial Assessment document has been completed it will be passed to a designated business support officer who will use a spread sheet formula to calculate the recommended level of financial support that will be paid to the special guardian.

The final payment that will be made to Special Guardians will be the allowance that is defined as an outcome of means test calculation minus any child benefit.

There is no assumption that all Special Guardians will receive financial support and the decision to provide such support will be dependent on the outcome of the means tested calculation.

Special Guardianship payments in London Borough Merton are tied to the rate of the basic allowances paid to Merton foster carers. With regard to these payments Merton Children's Social Care has a payment structure for fostering allowances consisting of:

- a) A basic allowance which is paid to foster carers at different rates dependent on the age and needs of the foster child. The basic allowance is reviewed regularly, and is set in accordance with the Fostering Network's minimum recommended allowance.
- b) An additional payment which is linked to a requirement that foster carers undertake programmes of training and skill development.

London Borough Merton only link special guardianship payments to the basic fostering allowances because there is no requirement for Special Guardians to complete training or skill development activity.

The level of allowance that will be paid to a Special Guardian will vary according to amount of available income.

The level of allowance that will be paid to a special guardian for each child will be a proportion of foster carer basic allowance minus any child benefit.

The maximum payment that will be made to a Special Guardian for each child will be the maximum basic allowance minus child benefit.

Appendix 9 of this document provides details of the payments that London Borough

Merton make to foster carers.

Additional Financial Support

Settling in Grants

A settling-in grant may be paid for children who move in with their special guardian on or after the date that a special guardianship order is made. Having regard to the sort of expenses that are associated with settling-in, the amount of settling-in grant should generally not exceed £500. There would need to be evidence of some special need, or some other relevant matter before it would be appropriate to pay a higher amount.

Payment of Legal Fees

Regulation 6 of the Special Guardianship Regulations 2005 states that financial support may be payable by way of a contribution to the legal costs of a special guardian or prospective special guardian associated with:

- the making of a Special Guardianship Order or any application to vary or discharge such an order;
- an application for an order in under Section 8 of the Children Act 1989 (a Contact Order, a Child Arrangement Order, or a Prohibited Steps Order or a Specific Issues Order)
- an Order for financial provision to be made to or for the benefit of the child It is necessary for the Local Authority to consider that such a payment is appropriate. It is difficult to predict when a payment will be appropriate and it may be necessary to seek input from the Council's legal services in such circumstances. In all cases an agreed limit to the Council's contribution will be set out in writing.

Guidance on Completing the Financial Assessment Form and the Use of the Means Test Model

The Guidance below provides specific information on:

- How to complete each section of the financial assessment form
- The means test model and how the level of allowance is calculated

Pay

This section will include basic net monthly pay, before any deductions for saving schemes, social clubs, accommodation/food and loans. However, the incoming figure

used will exclude any payments into pension funds.

Where one or both of the special guardians are self-employed, the only income which will be considered is 'drawings' as this is the equivalent of pay for a self-employed person. Any profit from the business which remains in a bank account will be taken into account as capital under other sources of income.

Where one or both of the Special Guardians receive overtime, fees, bonus/commission and/or gratuities on a regular basis this will be included as part of the monthly payment.

Individual Benefits and Pensions

Where the special guardian receives individual benefits (i.e. those that are not calculated on a household basis) these will be included in this section. If the benefit payments are currently received weekly then these are multiplied by 52 and divide by twelve to give a monthly amount. Benefits to be entered in this section should include:

- a) Employers sick pay;
- b) Incapacity benefit;
- c) Statutory maternity, paternity or maternity allowance;
- d) Bereavement benefit;
- e) Working tax credit (if paid directly and not as part of pay and excluding any childcare element received);
- f) All pension payments received;
- g) Any other individual benefits.

The Working Tax Credit Award notice held by the carers will provide information needed for this section of the assessment.

Where a childcare element is paid as part of the working tax credit, this should be disregarded for the income section of the test. This type of credit needs to be considered when completing the expenditure section on childcare (see below).

Any other benefit received by the parents or child/ren who are included in this assessment, relating to disability/long term ill-health will not be considered as part of the means test (i.e. such benefits will not be considered as income).

Any other benefits received by the parents, for example help with costs associated with disability or mobility will be disregarded and not included in the income section.

Financial support paid to Special Guardians under the regulations cannot duplicate (or substitute) any payment to which Special Guardians would be entitled to under the tax and benefit system. Only benefits that are currently being paid to the household will be included on the assessment form. If there are other benefits that London Borough Merton believe the household would be entitled to this must be pointed out to the Special Guardians.

Benefits

Where benefits are received by the family or members of household, as opposed to being paid directly to the parents, they should be recorded in this section. This is primarily for benefits which are calculated on the basis of household composition. Benefits to be

included in this section are:

- a) Income Support;
- b) Jobseeker's Allowance;
- c) Child tax credit per household;
- d) Child benefit for each child, excluding the child/children who are the subject of this assessment application.

If a member of the household receives Income Support or Jobseeker's Allowance, the amount per household should be recorded.

The benefits which should be detailed on the form should include child tax credit received for each child as at the time that the test is applied. All those who received child tax credit should receive an award notice setting out how much they will receive.

Child benefit should be included for each child living in the household, excluding the child/children who are the subject of this assessment application.

Benefit relating to disability or long term ill-health will not be considered as part of the means test (i.e. such benefits will not be considered as income and will be disregarded).

Housing benefit will be excluded from this section, as it is disregarded for the purposes of the expenditure section below.

Other Sources of Income

Where the family receives income from capital, savings and/or investments, this will be assessed in terms of net monthly interest only, as paid. This is the income that is routinely available to the family, and should be clearly shown on statements/similar.

If the family receives income from boarders/lodgers, this should be calculated on a weekly basis (then multiplied by 52 and divided by 12 to give a monthly amount if the test is being completed on a monthly basis). To calculate the weekly income, all weekly payments for board and lodging must be added together, a £20 disregard applied and then 50% of any excess over £20 for each person deducted. This is how income from boarders/lodgers is calculated for income support purposes.

Examples of the approach for income from boarders/lodgers are as follows:

Boarder/lodger 1

Weekly payment		£100.00
Deduct £20 (disregard)	-	£20.00
	=	£80.00
Deduct 50% of remainder	-	£40.00
Income from boarder/lodger 1		£40.00

Where the family receives income from rent on an unfurnished property, this should be calculated on the following basis: monthly income received in rent after the deduction of any costs. Deductions can be made for:

- a) Interest payments on the mortgage (but not mortgage capital payments);
- b) Repairs;
- c) Council tax (if paid by the family being assessed);
- d) Agents' fees;
- e) Insurance (buildings).

If income is received from furnished properties, the same calculation applies as above for unfurnished property, but an extra 10% deduction from the monthly rent received can be

made as a 'wear and tear allowance'.

If the person who is the subject of the assessment has completed a recent tax return, local authorities may ask to see a copy of this. The tax return should have the information which may assist in the completion of this section of the form

Other income to take into consideration includes maintenance payments received for any child in the household and existing special guardianship allowances (including enhancements for special needs) paid for any child. This latter may be paid where, for example, the family has become a Special Guardian for a child with a different local authority and therefore receives a separate allowance.

Income Relating to the Child/Children placed on a Special Guardianship Order

This section relates to the child/children who is subject to the Special Guardianship Order. Any regular interest on capital and/or income in which the child/children has a legal interest and entitlement should be included here. This could be, for example, a savings account, trust fund, property or other legacy.

Payments from Criminal Injuries Compensation Awards should not be included.

Please also consider any other income to which the child/children might be entitled. This section does not record child benefit for the child placed on a Special Guardianship Order, which will be deducted from the final payment resulting from this means test.

Income Calculation

The means test spreadsheet will automatically calculate the household monthly income.

Projected Family Expenditure

Home Expenditure

This section should include mortgage payments, made up of capital and interest, and also including any endowment payments linked to the mortgage. If the family pays rent, the monthly amount actually paid should be recorded here, after any deductions made for housing benefit. The only other outgoing which should be included in this section is council tax paid; this should be the amount paid after the deduction of any council tax benefit received by the household or discount for single adult households or second homes.

Other Outgoings

Where the family pay regular monthly repayments on loans for housing improvement (e.g. extensions/new kitchens) or transport costs (e.g. new car), these are included in this section.

Other payments which can be included in this section include maintenance payments, payments relating to court orders, private pension contributions and national insurance if

self-employed or not working.

The section for 'reasonable' child care costs will be determined by London Borough Merton depending on (a) the circumstances of the family in question (e.g. how many hours the parents work); and (b) local costs for child care services. Costs recorded in this section should be those paid after any childcare element paid as part of the parents' working tax credit. All those who receive working tax credit will receive an award notice which sets out how much they will receive.

Core Regular Family Expenditure

General household expenditure on items such as food, transport, clothes, recreation should be calculated using the Income Support allowance rates, increased by 25%.

Where the family's disposable income is less than £0, the spreadsheet will show the maximum special guardian allowance as being the full pay basic carer payment. This is because the special guardian has provided evidence via the disposable income calculation that shows they do not have the means to accommodate any further expenditure.

Where the family's disposable income is higher than £0, the spreadsheet will calculate an allowance as a percentage of the maximum basic fostering allowance payment. The further the disposable income figure rises above zero the lower the level of Special Guardianship allowance that is paid.

The amount of financial support that is provided to the special guardian should be detailed on the Special Guardian's Financial Support Agreement Form which is attached as appendix 4. A copy of this form should be forwarded to the Special Guardian and a copy maintained on the child's file.

Summary of Financial Support Assessment Process

Once financial support has been requested the social worker will assess the need by completing with the special guardian a financial assessment. The assessment will identify:

- a) The category of need for which financial support is required
- b) The type of financial support, which would best meet this need, e.g. on-going expenditure or a single payment.
- c) Whether or not the amount should be means tested

Where a means test is required, the Social Worker will liaise with the business support officer to arrange for a DCSF means test to be sent to the special guardian, with a copy of the leaflet outlining benefits available.

The business support officer will provide the results of DCSF means test to the Social Worker who includes the results of the means test and the proposed payment rate in the Special Guardian Support Plan.

Following approval of the Special Guardianship Allowance, the social worker will send a letter (Notification of SGO Financial Support payment letter and acknowledgement) to the applicant requesting that they sign the letter, accepting the terms and conditions of the offer. The letter must contain the following information:

- 1) the method used to determine the amount of the allowance;
- 2) the amount of the allowance;
- 3) the date of the first payment of the allowance;
- 4) the method of payment of the allowance and frequency with which and the period for which payment will be made;
- 5) the arrangements and procedures for review, variation and termination of the allowance, see paragraphs below;
- 6) the criteria which would cause the payment to cease automatically and the prospective adopters responsibility to notify the authority should one of those criteria arise. It should also be indicated that any avoidable over payment made as a consequence of the adopters failing to notify the authority of such changes will be reclaimed;
- 7) an acknowledgement slip for the prospective special guardians to sign stating they accept the terms and conditions of the offer of financial support.

If the carer disagrees with the Council's decision regarding financial support then he or she may ask for a review. The request should be made in writing, setting out relevant concerns.

The Annual Reviews of the Special Guardianship Financial Support

The level of allowance that the Special Guardian receives will be reviewed annually just before the anniversary of the commencement of the allowance, and each year the Special Guardian will be required to re-complete the financial assessment document.

Any changes to the financial circumstances of the Special Guardian household are likely to result in a change in the level of allowance that is awarded.

Special Guardians are required to inform London Borough Merton of any changes to their financial circumstances. These changes will trigger a review of the payments that are made and the level of payment may change as a consequence of this review.

If Special Guardians fail to inform the council of any changes to their financial circumstances, the Council reserves the right to seek a reimbursement of payments made to them.

An early review may be initiated if:

- 1) The Local Authority becomes aware of any significant changes in the circumstances of the family
- 2) The Special Guardian notifies the Local Authority of any significant changes or requests an early review because of a change in financial circumstances

If it is proposed to vary or terminate the provision of Special Guardianship Allowance following a review, then notice of the proposed decision should be given and time allowed for the affected person to make representations. The notice must be given in writing.

Cares should be notified in writing of the outcome of any review and provided with reasons for any decision.

Process if Information is not received for Annual Review

If the special guardian does not return the annual review form within the initial requested timescale, a reminder letter will be sent to request the information to be sent within 21 days of this letter.

If no reply is received within the deadline of 21 days we will send an additional letter to state that payments will stop within 10 days if there is no communication with the department.

Practitioner’s Tool Kit

The following documents should be used to assist practitioners in their management of Special Guardianship Support Allowances.

	Appendix
Financial Assessment Form CFA3	1
Outcome of Initial Assessment (eligible)	2
Outcome of Initial Assessment (not eligible)	3
Financial Support Agreement Form	4
Notification to Review of Financial Support Allowance	5
Outcome of Financial Review (eligible)	6
Outcome of Financial Review (not eligible)	7
Recovery of Overpayment	8
London Borough Merton Fostering Rates	9
Special Guardianship Support Plan.....	10

FOR OFFICE USE ONLY	
Date Financial Assessment Form Sent	00/00/2016

Children’s Social Care Financial Assessment Form – CFA3

MEANS TESTING FOR FINANCIAL SUPPORT

Adoption, Special Guardianship Order and Child Arrangement Orders

If you request financial support, you must complete this form and provide the local authority with full details of your finances. This form enables us to do a financial assessment to determine if and how much financial support you are entitled to, to meet the costs of caring for the child/ren.

1st Parent/Guardian					
Full Postal Address					
Date of Birth					
Contact Number					
Email Address					
National Insurance Number					

To help us process your application as quickly a possible, please send us all the information and copies of documents within the next 14 days or you may not be assessed fairly. Please inform us if you cannot do this. Send your completed form and copies of all documents to:

**Finance & Records officer, Adoption and Permanence Team, London Borough of Merton,
11th Floor, Civic Centre, London Road, Morden, SM4 5DX**

If you need any help with the questions in this form, please contact either:

Finance Officer: **020 8545 4330**

Income and Maximisation Officer: **020 8545 4846**

Any details that you provide on this form will be strictly confidential

Section 1- Personal Details of Parent(s)/Guardian(s)

A. Please provide details of the child(ren) subject to this financial assessment	
Name:	Date of Birth:
Name:	Date of Birth:
Name:	Date of Birth:

B. Please provide details of any other child(ren) living in the household or new child(ren) to be joining the household	
Name:	Date of Birth:
Name:	Date of Birth:
Name:	Date of Birth:
Name:	Date of Birth:

2nd Parent/Guardian					
Full Postal Address					
Date of Birth					
Contact Number					
Email Address					
National Insurance Number					

C. Household composition (please list all other members of the household)

Name	Relationship to child(ren)	Date of Birth

Photocopies of all documents are acceptable.

Please answer all of the questions. If any do not apply to you, please answer Not Applicable.

Please provide us with proof of your income, outgoings and savings. For example, bank or building society statements or books and benefit award letters, payslips and P60.

If you are in receipt of benefits please provide details of the following where applicable, income support, job seekers allowance, employment support allowance, universal credit, PIP, Carers Allowance (not for child in question) housing benefit and council tax benefit. We will use the information you give us to work out how much you will receive each week towards the cost of caring for your child(ren) needs.

Section 1.1

How much do you and your partner (if applicable) earn

For proof of income, please give us whichever of the following applies to you and to your partner

If employed

Please provide the last 6 months payslips and the current years P60

Please complete your employer's details:

1 st Parent/Guardian	Employers full name and address	Basic Net Pay
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2 nd Parent/Guardian	Employers full name and address	Basic Net Pay

If self-employed

Please provide last 2 years HMRC Self-Assessment Tax Calculation **SA302**
Following a self-assessment Tax Return, this shows the taxable income and the tax that is due. You can get evidence of your earnings ('SA302') for the last 4 years once you've sent your Self Assessment tax return either by post or online at <https://www.gov.uk/sa302-tax-calculation>

OR

Audited accounts for your last year.
They must be signed by your accountant and company director, a company stamp is not sufficient evidence.

If self employed please provide the following details:

1 st Parent/Guardian	Name of business and full postal address

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2 nd Parent/Guardian	Name of business and full postal address

National Insurance Contributions (as self employed)	Amount	Weekly/Monthly
1 st Parent/Guardian		
2 nd Parent/Guardian		

Section 1.2

Income - about your Benefits and Pensions

Please provide us with the latest award letter for any other income that you and your partner may receive as laid out below, the amount you receive and how often you receive it.

Section 1.3

a. Other sources of Income

Please provide details of any other sources of Income including interest, dividends, capital, savings and/or investments. Please enclose proof of income (*photocopies are acceptable*).

Name of Bank/Building Society etc.	Amount of income	Frequency per week/month/year
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Please enclose latest award letters only (<i>photocopies are acceptable</i>).	1 st Parent/Guardian		2 nd Parent/Guardian	
	Weekly Income	Monthly Income	Weekly Income	Monthly Income
All pensions received including Department for Work and Pensions				
Pension Credit				
Statutory Maternity or Paternity				
Universal Credit				
Child Tax Credit				
Working Tax Credit				
Housing Benefit				
Council Tax Benefit				
Jobseeker's Allowance				
Employment and Support Allowance (ESA)				
Enhanced Employment and Support Allowance (EESA)				
Income Support				
Carers Allowance				
Attendance Allowance				
Disability Living Allowance				
Personal Independence Payment				
Allowances from other Local Authorities i.e. SGO allowances (for child/ren that are not part of this assessment).				
Child Benefit for each child (do not include Child Benefit for child/ren who are the subject of this assessment application)				

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b. Income from boarders/ lodgers

Name of boarder/ lodger	Amount of rent received	Frequency per week/month

c. Income from rented property

Full Postal Address of Rented Property		
Is this furnished/unfurnished		
Amount of Income		Frequency per week/month

Deductions can be made for the following:-	Amount £	Frequency per week/month
Interest payments on the mortgage (but not mortgage capital payments)		
Repairs		
Council Tax (only if paid by you as landlord)		
Agents fees		
Insurance (buildings only)		

Section 1.4

Income relating to the child(ren) joining the household

a. Other Income

Maintenance payments received for any child(ren) living in the household

Name of child	Amount £	Frequency per week/month

b. Adoption, Special Guardian Order or Child Arrangement Order Allowance for any child(ren). (Including any enhancements or specific payments for special needs)

Name of child		
Type of Order		
Name of Paying Authority		
Amount per week/month (delete as appropriate)		

c. Interest received (e.g. Trust fund, property or other type of legacy)

Name of Child	Account Type (e.g. trust fund, property or other type of legacy)	Interest Received	Frequency per week/month

d. Do any of the children listed on Page 2 receive any other benefits?

(Please tick which applies) YES NO

Name of Child	Type of Benefit (e.g. Disability Living Allowance etc.)	Amount £	Frequency per week/month

Section 2.1

Family Expenditure (Home)

Please provide copies of the last three months bank statements of all accounts held in your name or your partners name by your bank or building society.

Photocopies are acceptable	Amount £	Frequency per week/month
Mortgage payments (made up of capital & interest) Please provide a copy of the last statement received		
Endowment payments linked to mortgage Please provide a copy of the last statement received		
Rent (minus any deduction for housing benefit) Please provide a copy/statement of rent paid		
Council Tax Please provide a copy of the current years statement		

Section 2.2

Other expenditure

Please note - These will be decided in relation to the individual circumstances and evidence may be requested if the need incurred as a result of the Adoption Order.

Regular monthly repayments	Amount £	Frequency per week/month

Section 2.3

Any Additional Information

Please provide details of any other income/expenditure not mentioned above. Please do not provide details of payments for food, utilities etc.

Section 3

Declaration

Please read and sign the declaration.

- **I / we** confirm that the information I have given on this form is true and correct.
- **I / we** agree to you making any enquiries that you consider necessary.
- **I / we** understand that I/we must tell you immediately if there is any change to my/our circumstances.
- **I / we** give permission for the Department for Work and Pensions, Jobcentre Plus, Inland Revenue and London Borough of Merton to exchange any information it has about me/us.
- **I / we** agree to send you details of any benefits I/we receive so you can process my/our assessment.

To be signed by both Parent(s)/Guardian(s)

1st Parent/Guardian	
Print Name	
Signature	
Date	

2nd Parent/Guardian	
Print Name	
Signature	
Date	

FOR OFFICE USE ONLY

Date Financial Assessment Form Returned	
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PLEASE CHECK YOU HAVE ENCLOSED ALL COPIES FOR PROOF OF INCOME AND EXPENDITURE

Please tick to show what documents are enclosed. Photocopies are acceptable.

	Enclosed
Payslips for Parent/Guardian 1 (last 6 months) and current year P60	
Payslips for Parent/Guardian 2 (last 6 months) and current year P60	
If self employed your last 2 years HMRC Self-Assessment Tax Calculation SA302 OR Audited accounts for your last year	
Bank Statements (Last three months bank statements of all accounts held)	
Universal Credit Award letter	
Child Tax Credit Award letter	
Working Tax Credit Award letter	
Award letter for any Benefits details in Section 1.2	
Rent Statement	
Housing Benefit Award letter	
Mortgage Statement and Endowment Payments linked to Mortgage (last statement received)	
Pension Award letter	
Award letter(s) for any other sources of Income detailed in Section 1.3	
Boarder/Lodgers & Rented Property (Most recent tax return or other proof for Section 1.3 B and C	
Award letters for any maintenance payments	
Income for child(ren) as in Section 1.4 A, B, C or D	

Appendix 2

London Borough of Merton

Finance Officer
11th Floor, Civic Centre
100 London Road
Morden SM4 5DX

Direct Line: 0208 545

Email:

Date:

Dear

Re: Outcome of Initial Financial Assessment for Financial Support Allowance

We have now completed your New Financial Assessment and can confirm that you are eligible for Financial Support Allowance. The Mean Test calculations for the allowance were based on your completed CFA3 Financial Assessment Form with copies of the evidence provided.

Please note we will be reviewing financial assessments alongside with the annual review each year from the date this allowance commenced.

The following amount below will be paid fortnightly for the following qualifying child/ren.

Name of Child	Date of Birth	Age Range	Weekly Amount

Allowance and date of first payment

The next payment run will be on 00/00/0000 and will be paid directly into your bank account by BACS by 00/00/0000.

Payments will be reviewed annually when the child moves into a new age category or following notification by you of any changes to your circumstances.

Change of Circumstances

You **must** notify the Adoption and Permanency Team, London Borough of Merton immediately of any of the following:

- a) Change of Address.
- b) Death of child.
- c) Child ceases to live with you.
- d) Child ceases full-time education or training and commences employment.
- e) Child qualifies for income support and job seekers allowance in his own right.
- f) The child attains the age of 18 unless he continues in full-time education or training, or the end of the course or training they are undertaking.
- g) There is a change in your financial circumstances.
- h) There is a change in the financial needs or resources of the child.

The arrangements and procedures for review, variation and termination of the allowance are outlined in the Guidance on Allowances and Support and this is available to view on request. Any avoidable over payment made as a consequence of you failing to notify the authority of such changes will be reclaimed.

Please fill out and return the attached Financial Support Agreement stating that you accept the terms and conditions of the offer of the Financial Support Allowance. For your convenience please find enclosed a self address envelope. On receipt of the signed Financial Support Agreement, the Adoption Team Manager will countersign.

If I can be of any further assistance in the meantime please do not hesitate to contact me.

Kind regards

Finance Officer
Adoption and Permanency Team

Appendix 3

London Borough of Merton

IMPORTANT - PERSONAL

Finance Officer
Adoption and Permanence Team
11th Floor, Civic Centre
100 London Road
Morden SM4 5DX

Direct Line: 0208 545 4330

Email:

Date:

Dear

Re: Outcome of Initial Financial Assessment for Financial Support Allowance

We have now completed your financial assessment using a Mean Test Tool based on your completed CFA3 Financial Assessment Form along with evidence provided.

Based on the outcome of this Mean Test I can confirm that you would not be eligible for a Financial Support Allowance.

If you do not agree with this decision, you have 10 days from the date of this letter to appeal.

To ensure we give you the most efficient service, please ensure all correspondence is in writing and for the attention of the Head of Service, Permanency Looked after Children and Care Leavers Service.

If I can be of any further assistance in the meantime please do not hesitate to contact me.

Kind regards

Finance Officer
Adoption and Permanency Team

Appendix 4

Financial Support Agreement Form

IMPORTANT - PERSONAL

for Special Guardianship Order

Section A

I/we have read and understood the terms and conditions of the financial support to be provided to me/us in respect of the child(ren) below.

Name(s) of Parent/Guardian/Carers:

--

For young person/s

--

Living at: (full postal address)

--

Contact Details:

Telephone	
Mobile	
Email	

Level of payment agreed for young person(s):

Full Name	Amount	per week

The Financial Support Allowance will be reviewed:

(a) Annually, OR

(b) When there is a change in financial circumstances or the financial needs of the child which may affect the amount of financial support payable

Signed:

(Head of Service, Permanency, Looked After Children and Care Leavers Service)

Date Form Sent	00/00/0000
-----------------------	-------------------

**Financial Support Agreement Form
for Special Guardianship Orders
Section B (To be completed by Parent/Guardian/Carers)**

The payment method will be BACS system to the following account: *(Please complete)*

Name and Address of Bank	
Name of Account Holder	
Account Number	
Sort Code	

The Special Guardianship Order Regulations 2005 require you to agree to the following:

(a) Complete and supply London Borough Merton with an annual statement regarding:

- Your financial circumstances
- The financial needs and resources of the child
- Your address and whether the child still has a home with you

(b) Notify London Borough Merton immediately if

- You change address
- The child dies
- The child ceases to have a home with you
- The child ceases full time education or training and commences employment
- The child qualifies for Income Support or Jobseeker’s Allowance in his or her own right
- The child attains the age of 18 unless she or he continues in full-time education or training, when the payments may continue until the end of the course or training that she/he is then undertaking.

I /We _____

Of (Address) _____

I/We Received the Financial Support Agreement on _____

I/we agree with the Financial Support Agreement *
I/we do not agree with the Financial Support Agreement *
(*Delete as applicable)

I agree to notify London Borough Merton of any changes in circumstances, as detailed above, and to provide an annual financial statement.

The CFA3 Financial Assessment form will be sent to you each year to complete.

Signed: Date:

Signed: Date:

Payments cannot commence until this form is signed, dated and returned.

Please complete both forms and retain one copy for your records and return the other copy to:

London Borough of Merton, Finance Officer, Adoption and Permanence Team
11th Floor, Civic Centre, 100 London Road, Morden SM4 5DX

London Borough of Merton
Finance Officer
Adoption and Permanence Team
11th Floor, Civic Centre
100 London Road
Morden SM4 5DX

Direct Line: 0208 545

Email:

Date:

Dear

Re: Notification to Review Financial Support Allowance

In accordance with the Merton Council Special Guardianship Financial Support Scheme, this letter sets out the terms and conditions of the provision of financial support paid to you for the child/ren laid out below, in accordance with The Special Guardianship Support Services Regulations.

Name	Date of Birth

This letter is notification of a financial review that needs to be completed in order for us to ensure that you are being paid the correct allowance and to identify any changes in your circumstances as follows:

- a) Change of Address.
- b) Child ceases to live with you.
- c) Death of child.
- d) Child qualifies for income support and job seekers allowance in his own right.
- e) Child ceases full-time education or training and commences employment.
- f) The child attains the age of 18 and continues in full-time education or training of the course they are undertaking.
- g) There is a change in your financial circumstances.
- h) There is a change in the financial needs or resources of the child.

If your child is now 18 years and over and is no longer in full time education or training please complete the enclosed agreement form (Cancellation of Financial Support Payments) to cease financial support.

If your child is now 18 years and over and is in full time education please forward a letter from their school/college/university where the course or training is being held with full details of the course/training attended and dates of commencement and end date. You will also need to complete the enclosed Financial Assessment Form – CFA3.

If your child is under the age of 18 years please find enclosed the Financial Assessment Form – CFA3 that you will need to complete, sign and return in the enclosed self addressed envelope.

I have also enclosed a copy of The Statutory Guidance (The Special Guardianship Support Services Regulations 2005) which will answer any queries that you may have regarding this review. However if you have any other questions please don't hesitate to contact me on the above telephone number.

We kindly request that you complete the form and return with all supporting documentation within 14 days of receipt of this letter, failure to do so could result in the termination of your financial support.

Yours Sincerely,

**Finance Officer
Adoption and Permanency Team**

ONLY TO BE COMPLETED IF YOU ARE INFORMING US THAT THE YOUNG PERSON IN YOUR CARE IS/ARE NO LONGER IN FULL TIME EDUCATION OR TRAINING.

Cancellation of Financial Support Payments

I/we agree the reasons for cancellation of financial support provided to me/us in respect of the young person(s) below as he/she/ they are 18 years and over and *(please tick which applies)*

- No longer in full time education or training of the course they are undertaking;
- No longer in full-time education or training and commences employment;
- Qualifies for income support and job seekers allowance in their own right;
- No longer lives with you.

Name of young person	Date of Birth
Name of young person	Date of Birth
Full Name of Parent/Carer/Guardian	
Full postal address	
Post Code	

Signed Parent/Guardian Carer	
Dated	

Signed Parent/Guardian Carer	
-------------------------------------	--

Dated	
--------------	--

London Borough of Merton
Finance Officer
Adoption and Permanence Team
11th Floor, Civic Centre
100 London Road
Morden SM4 5DX

Direct Line: 0208 545

Email:

Date:

Dear

Re: Outcome of Review of Financial Support Allowance

We have reviewed your financial support allowance based on the information you had provided in your returned Financial Assessment Form CFA3 along with supporting documentation, in accordance with the Merton Council Financial Support Scheme and the Special Guardianship Order Support Services Regulations 2005.

We can confirm that you are still eligible for financial support from The London Borough of Merton, however after completion of a Means Test it has been identified that there is a change in your financial circumstances and this changes the amount of financial support you currently receive. Please see below your new weekly allowance.

Please note that our Guidance on Allowances and Support and The Special Guardianship Order Support Service Regulations 2005 outlines that financial support allowance will automatically cease when child attains the age of 18 unless they continue in full-time education or training, when it may continue until the end of the course or training they are undertaking.

Name of Child/ren	Current Allowance	New Allowance

Date of first payment

The amount of £000.00 per week, to be paid fortnightly will commence on the next allowance pay date 00/00/0000 for weeks commencing 00/00/0000 and 00/00/0000. Please note that we pay all financial support allowances two weeks in advance.

The weekly allowance will be reviewed annually, when the child has moved into a new age category or following notification by you of any changes to your circumstances.

Changes in your circumstances

You must notify the Adoption and Permanency Team, London Borough of Merton immediately of any of the following:

- a) Change of Address;
- b) Death of child;
- c) Child ceases to live with you;
- d) Child ceases full-time education or training and commences employment;
- e) Child qualifies for income support and job seekers allowance in his own right;
- f) The child attains the age of 18 unless s/he continues in full-time education or training, when it may continue until the end of the course or training they are undertaking.
- g) There is a change in your financial circumstances;
- h) There is a change in the financial needs or resources of the child.

The arrangements and procedures for review, variation and termination of the allowance are outlined in the Guidance on Allowances and Support. Any avoidable over payment made as a consequence of you failing to notify the authority of such changes will be reclaimed.

As in accordance with statutory guidance, The Special Guardianship Order Support Service Regulations 2005, you have 28 days from the date of this letter to appeal in writing to Head of Service, Permanency, Looked after Children and Care Leavers Service regarding the above proposed decision.

However if you agree with the outcome, please complete and return the attached Financial Support Agreement stating that you accept the terms and conditions of the offer of the financial support allowance.

Yours Sincerely,

Finance Officer
Adoption and Permanency Team

London Borough of Merton
Finance Officer
Adoption and Permanence Team
11th Floor, Civic Centre
100 London Road
Morden SM4 5DX

Direct Line: 0208 545

Email:

Date:

Dear

Re: Outcome of Review of Financial Support Allowance

We have finish the review of your Financial Support Allowance based on the information and evidence you have provided in your returned Financial Form CFA3. We confirm that you are no longer eligible for financial support from The London Borough of Merton and that the amount of £000.00 for the following child(ren) will be terminated.

Name of child	Date of Birth

The reason we are terminating your financial support allowance:

(One of the following options will be selected)

- After completion of Mean Test it has been identified that there is a change in your financial circumstances due to increase of income that no longer entitles you to be eligible to receive the allowance.
- The child ceases to have be living at the home
- The child ceases full-time education or training and commences employment
- The child is in full-time education but the course or training they were undertaking has now ended
- The child qualifies for income support of jobseekers allowance in their own right.

As in accordance with statutory guidance, The Special Guardianship Order Support Service Regulations 2005, you have 28 days from the date of this letter to appeal in writing to Head of Service, Permanency, Looked after Children and Care Leavers regarding the above proposed decision.

However, if you agree with the decision of this termination of financial support, please fill out and return the enclosed acknowledgement slip in the enclosed self addressed envelope.

IMPORTANT - PERSONAL

Yours sincerely,

**Finance Officer
Adoption and Permanency Team**

London Borough of Merton
Finance Officer
Adoption and Permanence Team
11th Floor, Civic Centre
100 London Road
Morden SM4 5DX

Direct Line: 0208 545

Email:

Date:

Dear

Re: Recovery of Overpayment of Financial Support Allowance

Thank you for informing us that ((insert child(s) name) is (explain reason from evidence provided) as from (insert date).

I can confirm based on the information you have provided that we have made an overpayment to you. Payments should have ceased on (insert date), but you were paid up to (insert date); this created an overpayment of:

Total: £000.00

Please can you pay by cheque the amount of **£000.00** to be made payable to London Borough of Merton. I have enclosed a self addressed envelope for your convenience.

If paying this amount back in full causes you financial difficulties, please contact me on the above number within 10 working days to discuss.

Kind regards,

**Finance Officer
Adoption and Permanency Team**

IMPORTANT - PERSONAL

Appendix 9

London Borough of Merton Fostering Rates

All Financial Support Allowances are based on the Fostering Basic Weekly Allowance and on the age category the child falls in.

Age Category	Weekly	Monthly
0 to 10 years	£181.75	£787.58
11 to 15 years	£226.33	£980.76
16 plus years	£274.85	£1,191.02

IMPORTANT - PERSONAL

Appendix 10

This plan is to be shared with SGO applicants. This will enable applicants to inform the support plan. Please ensure that applicants are aware that this is a draft plan that is subject to Approval by Service Manager

Child:	
Prospective Special Guardian/s:	

1. Introduction
(a) Objectives and criteria for success
(b) Relevant timescales for this plan

2. Health	
Identified Needs	
Services to be provided:	

3. Emotional and Behavioural Needs and Family and Social Relationships	
Identified Needs	
Services to be provided:	

4. Contact between the child and parents/birth family	
Identified Needs	

Services to be provided:	
5. Mediation/Therapeutic Services	
Identified Needs	
Services to be provided:	

6. Training to meet specific needs of the child/respice provision	
Identified Needs	
Services to be provided:	

7. Financial and Practical Support	
Identified Needs	<u>Housing and Practical Needs</u> <u>Financial Issues</u>
Services to be provided:	<u>Housing and Practical Needs</u> <u>Financial Issues</u>