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RHONDDA CYNON TAF
TREFTADAETH GADARN | DYFODOL SICR

Special **Guardianship Orders**

Rhondda Cynon Taf **Financial** **Assessment Process**

Date of Guidelines Review: September 2016

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1. Financial Allowance for Prospective Special Guardians

Introduction

- 1.1 In order for special guardians to receive a financial allowance, they must fulfil the requirements for assessment and review, in line with the financial procedure outlined in this document. The financial procedure for Special Guardianship Orders (SGO) will also be applied in line with RCT's SGO policy on pages 10 to 14 of that document.
- 1.2 The duties in respect of support for special guardians are summarised in the SGO (Wales) regulations 2005 and in part 3 of the "*Guidance on the Special Guardianship (Wales) Regulations 2005*". Identified financial support is offered on a means tested basis except for applicants who are in receipt of income support. This document should also be read in conjunction with the Rhondda Cynon Taf policy and procedures for SGOs.
- 1.3 The provision of financial support should not be a barrier to securing a SGO on behalf of the child/ren, nor should it be the sole motivating factor.

2. Overview of the financial allowance assessment process

- 2.1 Following a decision that a full assessment for a SGO will proceed and be supported by the local authority, the relevant child's Social Worker will refer the applicant(s) to the RCT Welfare Rights Advisory service **at the earliest opportunity in the process**, using the referral form attached in appendix 2. It is essential that the referral form is accompanied by the consent document. These documents and the contact details for the Welfare Rights team are also available on the RCT intranet through the social care link. The referral will be allocated priority status and receive a response within 10 working days.
- 2.2 It is also possible for carers to request a provisional assessment if they are considering making an application for a SGO and would like to know the outcome of a financial assessment, in order to inform the decision making process.
- 2.3 The allocated Welfare Rights Advisor (WRA) will collect and verify the required financial information and documentation in line with appendix 3. This will enable the Community and Children's Services finance team to undertake a means assessment and calculate the level of allowance that may be payable should the application proceed.
- 2.4 The WRA will also identify and undertake income maximisation work, and provide assistance to the prospective special guardian(s) in claiming any benefits they may be entitled to if necessary.
- 2.5 The visit will be arranged at a mutually convenient time and place, following the identification of the need by the child's Social Worker for SGO financial assistance. **NB** under these arrangements, Social Workers will not be required to be directly involved in the collection and verification of financial information, unless the applicant is residing out of county. In those cases, the WRA (subject to line management agreement) and Social Worker will undertake a joint visit to collect relevant financial information, verify the documentation, and maximise income.
- 2.6 Should any issues relating to the above process arise, they will be shared with the assessing Social Worker/s.

- 2.7 Copies of the verified documents will be passed to and retained by the RCT Community and Children's Services finance team who will develop a mechanism for ensuring that all information required is collected, seen and stored.
- 2.8 The finance team will apply the means test model to assess if any SGO allowance is payable. The calculation will then be sent via e-mail to the child's Social Worker to share and discuss with the applicant(s). The e-mail will confirm if all documents required have been received in line with this policy. The assessment remains provisional until they are.
- 2.9 **A copy of the financial assessment, the referral to the WRA service, copies of any receipts/invoices for items/services purchased to facilitate the SGO, and any other correspondence or documentation related to the SGO allowance and agreement to pay legal costs must be indexed onto ESCR by the Social Worker.**
- 2.10 Where the decision is to proceed, the amount payable will be included in the Court Report and SGO support plan in accordance with the workflow (see appendix 1).
- 2.11 Following the granting of the SGO, the Kinship Care Business Support Team will be responsible for ensuring copies of the correspondence confirming details of the SGO allowance payable and the agreement form for the special guardian(s) (appendix 5) are sent to the special guardians, the relevant Intensive Intervention team. The letter will inform the special guardian(s) of the following:
- the outcome of the financial assessment
 - the amount, start date and frequency of payments
 - any conditions in respect of the allowance and the consequences of not meeting them
 - an agreement form
- 2.12 Special guardians should be asked by the child's Social Worker to provide details of their bank account (bank, branch, sort code, account number and name of account holder/s) for payments to be set up at the earliest opportunity and sent to the Kinship Care Business Support Team.
- 2.13 Following the granting of the SGO, the child's Social Worker is also be responsible for forwarding a copy of the SGO report, support plan, and the financial assessment to the Kinship Care Business Support Team for future reference should any queries arise in relation to the original assessment and agreement. This will be retained by Kinship Care Business Support in the name of the child/ren and the special guardian. Also any correspondence/documentation related to the management and review of the SGO allowance.
- 2.14 If the prospective special guardian refuses to cooperate with the WRA service, no allowance will be payable, however, an application can still be made if applicable for the SGO additional allowance for former foster carers (see section 7 of this policy).
- 2.15 If the WRA find that the prospective special guardian(s) is/are not claiming their welfare benefit entitlements in line with central government guidance, the following will apply:
- The welfare rights advisors will withdraw from the SGO financial process where misclaiming is suspected, in line with their working practice, and the matter will be referred back to the author of the SGO report for review and reconsideration of the application. The applicants will be informed of their responsibilities in

writing by the WRA. A copy of the letter will be sent to the assessing Social Worker.

- 2.16 Should the prospective special guardian(s) confirm at a later date that they have altered their claims in accordance with central government guidance, the financial procedure will restart and the allowance be reconsidered.
- 2.17 Following the granting of an SGO where financial assessments have not been completed, should the special guardian experience a change in their financial circumstances, they will be referred for a welfare benefits assessment to maximise their income.

3. Calculating the allowance – additional points

- 3.1 Where an entitlement to adult benefits is identified but not taken up by the applicant(s), the amount of the benefit ordinarily payable will be taken into account as income, as part of the assessment procedure.
- 3.2 Where an entitlement to child benefit and/or child tax credit is identified and applied for by the applicants but they are awaiting award, this income will be included in the allowance and reclaimed either from the backdated award, or through an adjustment of the allowance.
- 3.3 **Special guardians must notify the Kinship Care business support team when they become in receipt of the benefit and must provide a copy of the statement of award.** This is intended to avoid unnecessary delay in making the correct payments, and to arrange repayment options if necessary.
- 3.4 **It is the child's Social Worker's responsibility to discuss the financial options available to special guardians immediately after the SGO is granted, and to check the progress of the carer's application for child related benefits with them.**
- 3.5 The options are in place to ensure that special guardians do not experience financial hardship caring for a child whilst claims for child benefits are being processed by the relevant agencies. This process is also intended to ensure that when eligible, special guardians fully access child benefits as, under the order, they are encouraged to access all mainstream services, including any related to financial support for the child.
- 3.6 If six months elapses between the financial assessment being completed and the anticipated date of the commencement of the allowance, or a new financial year has commenced, a further financial assessment will be undertaken to reflect any changes in the prospective special guardian's financial circumstances and the rates payable in relation to the fostering allowance and welfare benefits.
- 3.7 If a family is in receipt of Income Support, and this is their only income, the applicable maximum allowance automatically becomes payable and the assessment of means is not applied. The applicant/s will automatically receive the current age related fostering allowance for the child, minus child benefit and child tax credit, subject to the provision of copies of documentary evidence of the benefits received.
- 3.8 Additional state benefits

- **Child benefit**

Any other dependent children should be included on the assessment form. Special guardians are entitled to Child Benefit for previously looked after children from the

start date of the SGO, and may also qualify for child tax credit. The WRA will identify these potential benefits as part of their income maximisation work.

- **DLA**

It is possible that, for children in receipt of DLA, special guardian(s) who acquire parental responsibility may also be entitled to claim additional disability related benefits. The WRA will identify these potential benefits as part of their income maximisation work.

- **Job Seeker's Allowance and Employment Support Allowance**

Where the applicant is in receipt of these benefits, they will be subject to the assessment of means.

4. Required documentation

4.1 If one or both of the special guardian applicants are:

- employed, copies of the previous two months payslips are required, and will be retained on file
- self-employed, copies of the **current** certified Inland Revenue income tax return form and Profit and Loss account from their accountant.
- unemployed, copies of all DSS benefits are required, clearly identifying who the benefits are paid to
- in receipt of child tax credit, working tax credit, child benefit, or pension credit, copies of all pages of the end of year letter will be required.

4.2 Documentary evidence of all other household income to be provided to the WRA.

4.3 In relation to allowable household expenditure, documentary evidence of the items listed on the checklist for SGO financial assessment (appendix 3) to be provided to the WRA.

5. Applying the means test model

Income

5.1 The total weekly net income of the special guardian(s) (after deducting tax, national insurance and pension contributions) is taken into account. Any deductions taken at source for items such as monthly season ticket, travel allowance, loans, gym membership etc. will be **added back into the total net income**.

5.2 All other income of a regular kind will need to be included for the purpose of the means test, i.e. from non-dependants, own children, relatives, lettings of property and accommodation, income from savings and investments, pensions, court orders, child maintenance payments, all benefit income including working tax credits and child tax credits, all child benefit payments.

5.3 Furthermore, as part of the application for an SGO allowance, the disclosure of any other income not listed above is required. These may include, but are not restricted to, any payments received in respect of Adoption, Residence Orders, existing Special Guardianship Orders and Disability Living Allowance(s). Income from such payments are not included within the means test but are required to establish whether any other benefits can be accessed.

5.4 Where the young person the subject of the SGO application, or another young person in the household, is in receipt of the Education Maintenance Allowance (EMA) or income associated with government employment training schemes, these will not be included in the household income assessment.

5.5 **Any fostering allowances and fostering remuneration fees received by the special guardians are not taken into consideration as income for assessment purposes.**

5.6 **Self-employment Income**

Income for self-employed applicants will be based on their drawings. Any profit from the business sitting in a bank account, i.e., not being reinvested in the business, will be taken into account as capital and assessed as per capital investments below.

5.7 **Board/lodge Income**

Income from boarders/lodgers will be taken into account and assessed as a weekly income. A £20 disregard will be applied to the total weekly income from boarders/lodgers and then 50% of any excess over £20 for each person taken into account.

Example:

Lodger 1

Weekly income	£55
Less £20 disregard	<u>-£20</u>
	= £35
Deduct 50% from remainder	-£17.50
<i>Income relevant to assessment</i>	<i>£17.50</i>

5.8 **Rental Income**

Income received from rental for furnished or unfurnished properties will be taken into account as follows:

- **Unfurnished** – monthly income less interest payments on the mortgage, repairs, council tax (if payable by the renter), agent's fees and buildings insurance.
- **Furnished** – as above but with an extra deduction of 10% for wear and tear.

5.9 **Capital Investments**

Income assumed from capital investments and savings is taken into consideration. The first **£6000** is disregarded and £1 per £250 is subsequently calculated.

5.10 **Self-Assessment Tax Returns**

Where an applicant has submitted a self-assessment tax return to HMRC within the last year, a copy is required.

5.11 **Criminal Injuries**

Payments from Criminal Injuries Compensation Awards should not be included.

5.12 **Disregards**

A disregard of 20% is automatically applied to the total monthly household income.

5.13 **Income for the child**

Interest on capital or income in which the child has a legal interest or entitlement (apart from child trust fund interest) should be declared.

Expenditure

The following expenditure is taken into consideration:

5.14 Accommodation expenses

Accommodation expenses payable such as rent or mortgage repayments and council tax (including council tax benefit). This should be shown as weekly, monthly or annual as appropriate.

5.15 General Household Expenditure & Personal Allowance

General household expenditure on items such as food, transport, clothes, utilities (gas, electricity and water), recreation etc will be calculated using the Income Support allowance rates and increased by 25%.

Identified expenditure and process in relation to additional specific needs of the child.

- 5.16 This includes any costs associated with additional educational, health or behavioural needs, including items required for meeting any special needs of the child. It may also include additional costs associated with contact, support care, or essential items necessary to facilitate or sustain the arrangements for the child/ren.
- 5.17 Expenditure of this nature must be identified by the special guardian and Social Worker for the child at the earliest possible stage. The finance department should be advised prior to the financial assessment being undertaken.
- 5.18 Once the financial assessment is complete, an assessment of the support needs pre or post order is required. If this identifies additional financial support, requests for one-off payments not exceeding £500 in any 12-month period can be authorised by a Service Manager. Any amounts in excess of this in total will require preparation of a business case to be considered by the Head of Service.
- 5.19 The assessment of need for payment of additional costs should be identified in the SGO assessment and support plan, and final agreement sought from the Head of Assessment Intensive Intervention, at least 2 weeks prior to the court hearing date.
- 5.20 The child's record should hold the supporting documentary evidence that resulted in the decision being requested and made.
- 5.21 In most cases the cost of individual items and ongoing costs will be costed to them SGO cost centre and purchased or managed by the Kinship Care Business Support team. No payments should be authorised without notification from the Intensive Intervention team. In these situations, receipts and/or invoices for all expenditure must be kept electronically.
- 5.22 Where the payment is authorised and facilitated by the Intensive Intervention team, agreement must be obtained via e-mail from the Service Manager and all documentation and receipts must be kept on the child's electronic file. Team managers are expected to comply with these procedures.
- 5.22 When additional financial support has or continues to be provided, special guardians will be notified in writing.
- 5.23 **The need for ongoing additional expenditure will be re-assessed on an annual basis as part of the SGO allowance review procedure.**

6. The special guardianship allowance calculation

- 6.1 The family's disposal income will be calculated by adding together the accommodation expenses and the general household expenditure/personal allowance figures (set out in appendix 3), and offsetting this against the assessable income. This will provide an amount equating to the disposable income. The outcome of the assessment is determined by the amount of the disposable income as follows:
- Where the family's disposable income is £0, the maximum age related allowance, as per the RCTCBC fostering allowance (on which the SGO allowance is based), will become payable.
 - Where the family's disposable income is higher than £0, a percentage of that maximum allowance will be payable. As the disposable income figure rises above £0, the percentage of the maximum payment that the special guardians receive will be tapered at a set rate of 50%. This means that for every £1 of weekly disposable income a family is assessed as having, they will have 50p deducted from the weekly maximum payment. It is possible that this will result in a nil allowance being payable in some cases.
- 6.2 The amount of the regular allowance will then be reduced by the current child benefit payable and any child tax credits the applicant is entitled to after the SGO has been granted.
- 6.3 The outcome of the above assessment will produce the figure for the SGO weekly allowance payable if applicable. This will be sent by finance via e-mail to the Social Worker on the financial assessment pro-forma. The Social Worker will share with the prospective applicants and the full SGO assessment will proceed, or not.

7. The Special Guardianship Order additional allowance

- 7.1 Where the prospective special guardians are existing RCT mainstream or independent agency foster carers, an application can be made for a SGO additional allowance. This allowance may be payable in the following circumstances:
- as a prospective special guardian, the applicant was also the foster carer (approved either by RCT or contracted with an independent agency) of the relevant child immediately prior to the SGO being granted.
- 7.2 Where the above criteria is met, this additional allowance will be paid at the current RCT mainstream fostering fee rate, and will remain at this level for the duration of the order. It will be payable for up to a maximum of 6 years or until the child's 16th birthday or the order ceases (whichever is sooner).
- 7.3 The SGO additional allowance is not subject to the financial assessment process for the SGO allowance or means test as previously described, and will be paid in addition to the SGO allowance.
- 7.4 The rate of the SGO additional allowance for both RCT and external agency applicants will be the RCT mainstream foster carer rate, applicable at the time the SGO is granted, unless it can be evidenced, with supporting written evidence, that this would result in a significant detriment. These rates will not increase in line with inflation or any other changes, and will remain at that base level for the duration of the order, to be communicated to the applicants in writing.

- 7.5 If RCT foster carers are in receipt of a detriment payment in addition to their mainstream fee at the time of the SGO being granted, this will continue to be paid for the period as stated in 7.1 above.
- 7.6 Foster carers will be entitled to receive this additional allowance even if they do not wish to be financially assessed for the child related SGO allowance.
- 7.7 Mainstream RCT foster carers and external agency foster carers who apply for special guardianship status for RCT children in their care will also be subject to the financial assessment process for the child related SGO allowance described above.
- 7.8 Any additional SGO payments should not replace or enhance the assessed SGO allowance.

8. Special Guardian(s) responsibilities

- 8.1 If the special guardian(s) qualify for financial support following the means test, they must sign the agreement for the provision of a special guardianship allowance (appendix 5) undertaking to inform the Authority of the following:
- any change of address
 - that the child no longer permanently resides with them
 - if the child dies
 - if there is a significant change in theirs and/or the child's financial circumstances
 - if there is a change in family relationships (such as a new partner or the separation of the special guardians), that affects household income/expenditure
 - the SGO has ceased to have effect
 - the child ceases full time education i.e. between 16 and 18 years and commences employment
 - the young person qualifies for Income Support or jobseekers allowance in his/her own right
- 8.2 Notification of any the above should take place prior to the formal annual review via the Kinship Care business support team.
- 8.3 Special Guardians must cooperate with the annual review process outlined in section 10 below.
- 8.4 **Special guardians are required to inform the local authority of the progress of their claims for Child Benefit and Child Tax Credit within 4 weeks of the SGO being granted. Failure to do so will result in the suspension of payments.**

9. Additional information relating to the SGO allowances

- 9.1 The payment will commence from the date of the granting of the SGO (subject to the completion of the financial assessment beforehand).
- 9.2 Payment of an allowance will be made fortnightly in arrears by BACS payment, with monies being credited to the special guardian's nominated bank account. Payments will be processed by the Kinship Care business support team.
- 9.3 Payment of the child related SGO allowance or the SGO additional allowance if applicable will not increase during the term of the order.

10. Review

- 10.1 A financial review will take place annually from the date the SGO was granted. The Kinship Care business support team will be responsible for diarising reviews in conjunction with finance. However, any changes that may be identified in the support package as a whole prior to the date of the annual financial review, which would have an impact on any financial support offered, should be forwarded to the Kinship Care business support team in order for a review to be undertaken if necessary prior to the annual anniversary date.
- 10.2 Such changes could include the identification that financial support is no longer required or there has been a significant change in the needs of the child or the household income/expenditure, which may constitute an updated assessment. It is possible that the child related SGO allowance may reduce or cease following review or re-assessment.
- 10.3 The review letter and income and expenditure checklist (appendix 3 and appendix 6) should be sent to the special guardians at least 4 weeks prior to the anniversary date of the first payment and annually thereafter. These will be sent by the Kinship Care business support team.
- 10.4 A reminder letter will be issued two weeks after the review request if no response has been forthcoming from the applicant(s).
- 10.5 The review will take place within four weeks of the Kinship Care business support team receiving all required documentation.
- 10.6 Failure to submit a completed assessment or review may result in allowances being suspended. Special guardians will be notified of this writing.
- 10.7 Should the review indicate a significant change in the special guardian's circumstances, a referral to the Welfare Rights Advisory Service may be necessary to undertake a fresh assessment in line with this policy.
- 10.8 Payments may be suspended four weeks after the anniversary date of the commencement of the payment of the allowance (or 28 days after the date of the reminder, whichever is latest), if the declaration of financial circumstances forms have not been returned and the process set out in the guidance notes has been followed.
- 10.9 Payments will not be reinstated until the declaration form has been received by Kinship Care business support, the financial assessment has been completed and a positive outcome determined.
- 10.10 In respect of those cases where package of support services including financial support has been recommended, but the special guardian's income and expenditure has resulted in a nil assessment, a letter will be sent by the Kinship Care business support team advising them of the outcome of the assessment and the financial case will be closed. In these circumstances the special guardians will be advised of the decision, in writing, and also that this will not affect their right to approach the authority and request a financial assessment at any future date.
- 10.11 The review of the allowance may also be undertaken at any time when the authority is notified by the special guardians of any significant change in their own, or the child's, financial circumstances.
- 10.12 Payments of the SGO allowance will not be adjusted in line with any changes to benefits payments introduced by central government. The amount payable will

remain fixed at the amount calculated at the point the order was granted, for the duration of the order.

10.13 Payment of the allowance will be terminated when:

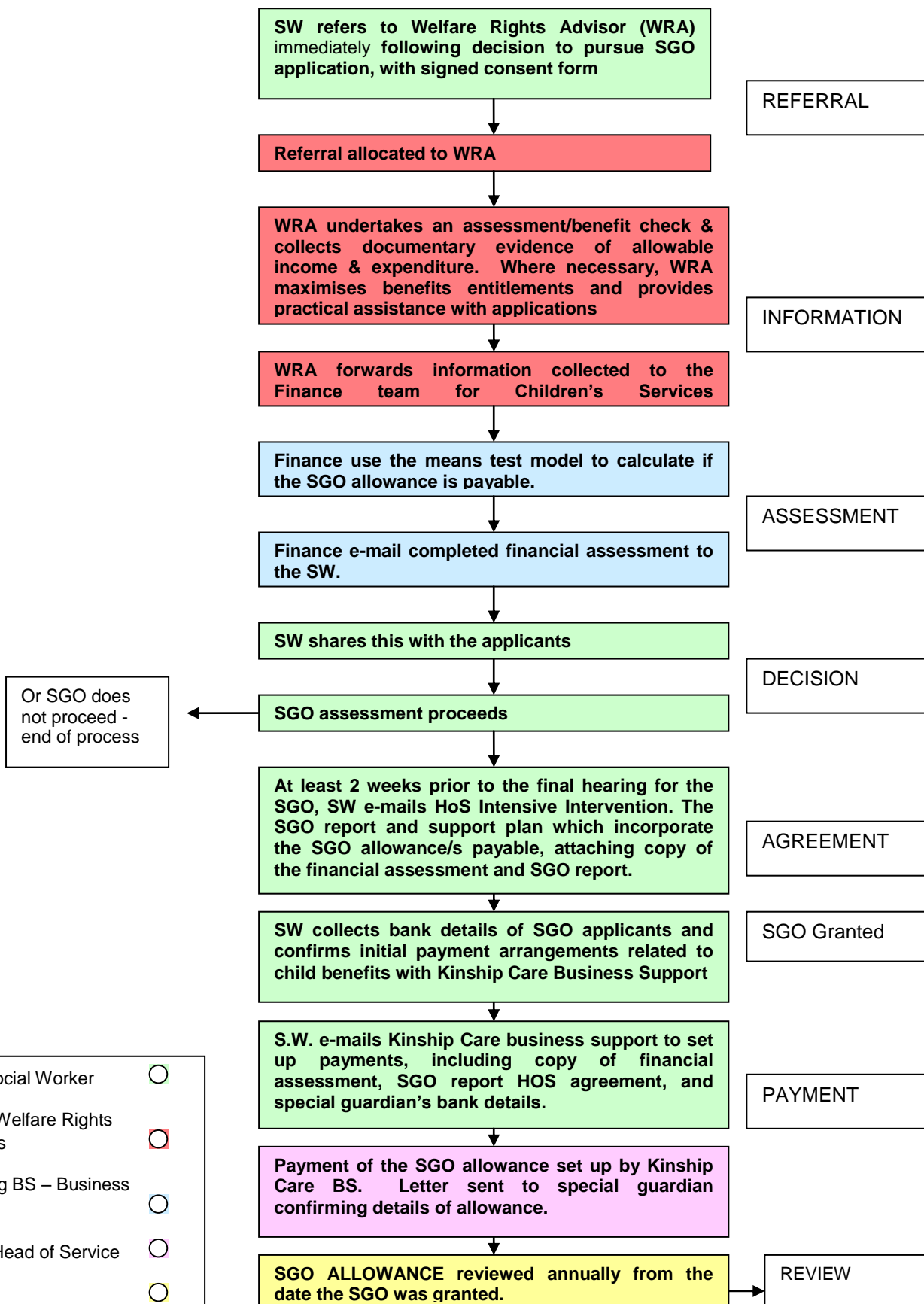
- the special guardianship order has ceased to have effect (e.g. because the child has attained the age of 18) or has been revoked by the court. The special guardian and the child's Social Worker will be informed of this in writing by the Kinship Care Business support team.
- the child ceases to permanently reside with the special guardians (or either of them)
- the child ceases full time education i.e. between 16 and 18 years and commences employment. The education maintenance allowance and government training schemes for young people between the ages of 16 and 18 will not be included as income for the SGO allowance.
- the young person qualifies for Income Support or jobseekers allowance in his/her own right

11. Advice for staff

The Welfare Rights Team are available to provide advice and guidance in relation to income maximisation and will collect the information required to complete the financial assessment and document verification to enable finance to establish the applicable financial allowance. Contact should be made using the referral form (available on the Rhondda Cynon Taf intranet and appendix 2), or email enquiries to welfarerights@rctcbc.gov.uk

The finance team for Community and Childrens' Services are responsible for the assessment and calculation of the SGO allowance.

Summary of the process for assessment of the SGO allowance





Appendix 2

Welfare Rights Advice Service Referral and Consent Form

Section 1: Service User

SIWFT number _____
Name _____
Address _____
Post Code _____
Date of Birth _____
NI Number _____
Contact Telephone Number _____
Does a home visit present any risk? ☐ Yes ☐ No

Name and relationship to service user if not service user

--

Has the service user an appointee? ☐ Yes ☐ No
Has the service user/appointee signed a consent form ☐ Yes ☐ No
Is the service user a dependant child? ☐ Yes ☐ No
If yes, complete Section 2

Section 2: Appointee / Parent / Guardian

Name of person claiming the benefit for the client _____
Their date of birth _____
National Insurance number _____
Relationship to service user _____
Address (if different from above) _____

Section 3: Referral Source

Name _____
Designation / Team _____
Address _____
Telephone _____
Date of Request _____

Section 4: Nature of enquiry

Benefit Check	<input type="checkbox"/>	Complete Section 5 of this form
Review	<input type="checkbox"/>	(Inside 1 month)
Supersession	<input type="checkbox"/>	(Inside 1 month)
Claim / reclaim	<input type="checkbox"/>	
Appeal	<input type="checkbox"/>	(Inside 1 month)
Other	<input type="checkbox"/>	

For reviews / appeals please ensure the date of the last decision is entered here

Letter attached

☐

Reason for referral

Prior to submitting a referral, please ensure that written consent is provided by the Service User as referrals made without written consent will not be accepted. The purpose of obtaining consent is to confirm that the client authorises Welfare Rights Workers to act on their behalf, retrieving and submitting information to other agencies as necessary. This should be explained to the Service User before a signature is obtained.

Section 5: Additional information

Partner's Details

Name

NI Number

Date of Birth

Registered Blind

☐ Yes

☐ No

Does anyone claim Carers Allowance to look after the partner

☐ Yes

☐ No

Dependant children in the household

☐ Yes

☐ No

Number

Ages

Non-dependants in the household

☐ Yes

☐ No

Number

Ages

Other important information, for example, diagnosis, treatment, lone visit issues, sources for supportive information, etc

The Welfare Rights Team is located at Ty Elai, the role of the Team being to:

- Enable individuals and families to determine whether they are receiving the benefits to which they are entitled;

- Enable individuals and families to claim a benefit to which they are entitled;
- Enable individuals and families to appeal against a decision that determines they are unable to receive a benefit to which they are entitled;
- Keep up to date with current legislation, providing advice and guidance to individuals, families and professionals about the benefit system and the Welfare Reform.

The Welfare Rights Service can help anyone residing in Rhondda Cynon Taf with questions or problems on a wide range of social security benefit and tax credit issues by:-

- Checking that individuals are getting the right amount of benefit (benefit check) based on the stated circumstances;
- Giving information on what benefits individuals/families may be entitled to, based on the stated circumstances and how to claim them;
- Advising on what will happen if current stated circumstances change;
- Advising on how to appeal against a decision made on a benefit claim.

Although we provide information and advice, we will only take on a case, act on behalf of an individual or represent at an appeal tribunal hearing if the individual or member of the household are currently receiving or have been assessed as needing a service from social care.

The Team can be contacted by telephone on 01443 425717 (lines open between 9.00 a.m. to 1.00 p.m. Monday – Friday) or via e-mail at Welfarights@rctcbc.gov.uk

Notification of a referral is to be sent to the Welfare Rights Team by e-mail at Welfarights@rctcbc.gov.uk

To prevent unnecessary delay or preclude denial of service, prior to completing this form, please ensure that written client consent is obtained.

- Consent for tax related benefits, e.g. tax credits should be obtained using the HMRC consent form and posed to the Welfare Rights Team as only originals can be accepted.
- Consent for all other benefits should be obtained using the “all other benefits” consent form and retained, via ESCR, indexed to the Service User’s SWIFT record.

NB Consent forms are located at:

<http://rctintranet/CommunityCare/new%20site/WelfareRights/index.htm>

The process map detailing the referral process can be found at:

<http://rctintranet/CommunityCare/new%20site/Process%20Maps/index.htm>

Whenever possible, Welfare Rights Advisors work remotely with clients over the telephone. Localised services are provided to clients requiring face to face contact within One4All Centres across Rhondda Cynon Taf and a home visit service is provided to our most vulnerable Clients who meet the following criteria:-

- Those who are unable to attend our offices due to a disability or chronic illness;
- Those who are the sole carer for an elderly, disabled or chronically sick person or a carer for multiple people;
- Those who are unable to arrange childcare despite appropriate efforts;
- Those with issues of anxiety and related mental health issues and known not to be able to engage

Checklist for SGO financial assessment/required information

To be completed by the Welfare Benefits Advisor

Name of Child(ren) subject to SGO Application	Swift No.	D.O.B
Child 1		
Child 2		
Child 3		

Details of Applicants applying for SGO Financial Assistance

	Applicant 1	Applicant 2
Name		
D.O.B	NI No	NI No
Address		

To be completed by the Welfare Benefits Advisor

Date of Visit

Documents to be collected. Please provide details / copies of:

Tick if received

Income

	App 1	App 2
Last 3 months payslips (to verify Net income from employment)		
Private Pension Statement(s) (if pension being received)		
State Pension Statement(s) (if pension being received)		
Tax Credits Award Letter (all pages)		
Child Benefit Award Notice		
Any Documentation detailing other benefits received		

Any Documentation detailing other income received e.g **Capital & Savings**

Expenditure

Current Council Tax Demand
Notice

Council:

Band:

Annual Mortgage
Statement

Receipts for payment of Rent

Day Care Receipts / Estimate from Provider (to verify Childcare costs)

Home Insurance payment schedule (to verify Building
insurance)

Any Documentation detailing payments ordered by the Courts

Any Documentation detailing Child Maintenance Payments

Statement of Private Pension Contributions paid (if not deducted from pay)

*A copy of the 2 most recent Bank Statement will also be accepted as
evidence of Income / Expenditure if other documents are not available.*

Any Additional Comments:

Signed By:

SGO Applicant 1

Print Name

SGO Applicant 2

Print Name

Welfare Benefits Officer

Print Name

SUMMARY OF THE CHILD RELATED SGO ALLOWANCE, AND THE SGO ADDITIONAL ALLOWANCE PAYABLE TO FORMER FOSTER CARERS

Approved Relative Foster Carers and Looked After Children	Other Relatives/Non Looked After Children	Approved Rhondda Cynon Taf Mainstream Foster Carers Independent Agency Foster Carers / Looked After Children
SGO allowance based on the age related fostering allowance for the child payable at the time SGO granted, and fixed at this amount for the duration of the SGO.	SGO allowance based on the age related fostering allowance for the child payable at the time SGO granted, and fixed at this amount for the duration of the SGO.	SGO allowance based on the age related fostering allowance for the child payable at the time SGO granted, and fixed at this amount for the duration of the SGO.
SGO allowance reduced by child benefit and child tax credit claimable after SGO granted.	SGO allowance reduced by child benefit and child tax credit	SGO allowance reduced by child benefit and child tax credit claimable after SGO granted.
Allowance also subject to an assessment of means (see policy) based on allowable household income and expenditure.	Allowance also subject to an assessment of means (see policy) based on allowable household income and expenditure.	Allowance also subject to an assessment of means (see policy) based on allowable household income and expenditure.
SGO allowance payable fortnightly in arrears until the child's 18 th birthday or the revocation of the SGO, subject to annual review from the date SGO granted.	SGO allowance payable fortnightly in arrears until the child's 18 th birthday or the revocation of the order, subject to annual review from the date SGO granted.	SGO allowance payable fortnightly in arrears until the child's 18 th birthday or the revocation of the order, subject to annual review from the date SGO granted.
Referral to the WRA service in all cases to collect financial information required, and maximise entitlement to benefits.	Referral to the WRA Service in all cases to collect financial information required, and maximise entitlement to benefits.	Referral to the WRA Service in all cases to collect financial information required, and maximise entitlement to benefits.
		The SGO additional allowance will be payable for 6 years after SGO granted, or until child's 16 th birthday if that is sooner -policy section 7.
		The SGO additional allowance is not subject to the assessment of means.
		The level of the additional allowance payable will be fixed at the applicable RCT mainstream foster carers rate for the length of the SGO.
		Any detriment payable at the point SGO granted will be protected for 6 years or the child's 16 th birthday if that is sooner – policy section 7.

Private and Confidential

Gofynnwch Am:
Please ask For:

Your Ref:

Rhif Est:
Ext No:

Dyddiad:
Date:

Fy Nghyf:
My ref:

Ebost:
Email:

Dear(Special Guardian/s),

Re: Special Guardianship Order Allowance in respect of (name) (dob)
(address)

I have been advised that you were granted a Special Guardianship Order on..... in respect of the above named child/ren.

In line with regulation 10 of the Welsh Assembly Government guidance this letter acts as notification of the amount payable, how it has been calculated, the arrangements for payments, the review procedure, and your responsibilities as special guardians.

The amount payable to you is £... per fortnight, calculated following completion of the financial assessment by the Rhondda Cynon Taf finance department. The amount is based on the current age related fostering allowance, and reduced by any child benefit and child tax credit you are, or may be, entitled to. The allowance has also taken into account allowable household income and expenditure, and an assessment of means.

The special guardianship allowance will be fixed at the current rate payable for the duration of the Order unless there is a significant change in your financial circumstances.

If you are entitled to child benefit and/or child tax credit you must make your claim immediately if you have not already done so. If you have not registered your claim within 4 weeks of the order being granted there is a risk that the allowance may be suspended.

Payments will be transferred to your bank account via the BACS system fortnightly in arrears commencing the ...2016. If you are waiting for the outcome of a claim for child benefit and/or child tax credit and RCT are continuing to pay the full fostering rate until you receive the award, you will be required to return any back payment to this office. RCT will continue to pay the fostering rate for 4 weeks following the Special Guardianship Order being granted. Future payments will then be adjusted accordingly.

If you are not currently in receipt of child tax credit for the child/ren, please send a full copy of the statement to this address when you receive it, in order to ensure that the allowance has been calculated correctly.

The allowance will be reviewed annually from the date the Special Guardianship Order was granted. At that time a letter will be issued from this office requesting an update of your financial circumstances, in order to ensure that the allowance continues to be paid at the correct level.

Any significant change in circumstances may require a full re-assessment; it is possible that the allowance may change or cease as a result.

As special guardians, you also have a duty to inform the authority of any significant changes to household income and expenditure and/or the child's circumstances before any scheduled annual review, as follows: -

- If the Special Guardianship Order has been revoked
- If the child has ceased to have a permanent home with yourself/ves
- When the child reaches his/hers 18th birthday
- If the child dies.
- If the child receives income from employment or benefits in their own right or any windfall payment.

Failure to co-operate with the requirements outlined above may result in the suspension and/or cessation of the allowance.

Please also note that is the responsibility of the claimant to notify the authority of any under or over payments made in respect of this agreement, and that any under or over payment will be recovered through an adjustment to future special guardianship payments.

Please return the agreement document attached to the above address and retain a copy for your records.

If you have any queries with regards to the above, please do not hesitate to contact the above number

Many thanks for your cooperation.

Name:
Fostering Business Support Officer

Special Guardianship Order allowance agreement

As the special guardian/s for –**name of child/ren** – I/we agree to inform Rhondda Cynon Taff County Borough Council of the following:

- if the Special Guardianship Order is revoked or ceases to have effect
- any change of address
- if the child/ren ceases to live with me/us
- when the child/ren reaches their 18th birthday
- if the child/ren dies
- if the child/ren receives income from employment or benefits in their own right
- any changes to the financial circumstances of myself and /or the child
- if I/we become aware of any under payment or over payment to us of the Special Guardianship Order allowance
- any award of child benefit or child tax credit after the SGO has been granted, including a copy of the full statement of award

Agreement

Signed by the special guardian

I confirm that I have read and understood this agreement and will be bound by the terms and conditions.

Name (Please Print)	
Signature	
Date	

Signed by the special guardian

I confirm that I have read and understood this agreement and will be bound by the terms and conditions.

Name (Please Print)	
Signature	
Date	

Private and Confidential

Your Ref:

Fy Nghyf:
My ref:

Ebost:
Email:

Dear

Review of the Special Guardianship Order allowance in respect of:

Name dob... name ... dob (if siblings)

Address:

SGO granted: date

As you are currently receiving a Special Guardianship Order allowance for the above named **child/ren** it has become necessary, in line with regulation 12 of the Special Guardianship (Wales) Regulations 2005 and Local Authority policy, to review the payment.

In order to complete the review, we will need to know if your financial circumstances or the financial circumstances of the **child/ren** who **is/are** the subject of the Special Guardianship Order have changed. Please complete and return the enclosed current statement of your income and expenditure along with supporting documentation, to ensure that the assessment of the allowance payable is accurate.

- Most recent child tax credit statement
- Most recent child benefit award
- In the absence of the above, a copy of a bank statement showing most recent payments of the benefits

Photocopies are acceptable; however, please ensure that the entire document is copied.

The completion of the statement is also required to notify us if other circumstances have changed, for example, if the Special Guardianship Order is no longer in place, if the **child/ren** no longer lives with you, or if **he/she** is receiving income from employment or benefits such as Income Support or Job Seeker's Allowance in their own right.

Please return the document attached to the above address within the next 14 days. This will be followed by confirmation from this department of the amount payable and arrangements for future payments if any changes are to be made, otherwise the allowance will continue to be paid in the usual way. Failure to do so may result in the payments being suspended or stopped.

If you have any queries, please do not hesitate to contact the above number.

Yours sincerely

Name:

Fostering Business Support Officer

SPECIAL GUARDIANSHIP ORDER ALLOWANCE REVIEW
STATEMENT OF INCOME & EXPENDITURE

SPECIAL GUARDIAN(S)				
Name(s) of Special Guardian(s)				
DOB				
Address				
Telephone Number				
CHILD/ CHILDREN				
	Child 1	Child 2	Child 3	
Name				
DOB				
Address				
INCOME				
<i>Please provide income in £'s per week for each Special Guardian</i>	1 st Special Guardian		2 nd Special Guardian	
	Name:		Name:	
Net income from employment				
Any income from benefits or pensions including working tax credit				
Child Tax Credit per household				
Child Benefit for the child				

Any other income (eg from property, maintenance payments, tenants, lodgers, interest from capital/investments)				
EXPENDITURE				
<i>Please provide expenditure in £'s per week for each Special Guardian</i>	1st Special Guardian		2nd Special Guardian	
	Name:		Name:	
Mortgage				
Rent Payable (after benefits)				
Council tax payable (after benefits)				
Child maintenance payments				
Court Orders				
Private pension contributions				
Child care costs (for the child or siblings subject of the SGO)				
Buildings insurance				

Please provide copies of documentary evidence of the above, including a full copy of your child tax credit statement and statements of other benefits, and three copies of your most recent wage slips.

Additional Questions

1. Have you or the child/ren changed address since the Special Guardianship Order was granted? Yes / No
If yes, please provide details of new address:

.....
.....

2. Does the child/ren still live with you? Yes / No
If not, please provide details of the child's current living arrangements:

.....
.....

3. Has the child died? Yes / No
If yes, please provide date of death:

.....

4. Has the Special Guardianship Order been revoked by the court? Yes / No
If yes, date of revocation:

.....

5. Are you in receipt of any regular payments from Rhondda Cynon Taf County Borough Council as special guardians for the child/ren in addition to the SGO allowance? Yes / No
If yes, please specify:

.....
.....

6. Has the child/ren reached their eighteenth birthday? Yes / No
If yes, date of birthday:

.....

7. Is the child/ren receiving income from employment or benefits in their own right? Yes / No
If yes, please provide details and documentary evidence:

.....
.....
.....



8.	Has the child/ren become in receipt of any windfall payments, inheritance or lump sums? <i>If yes, please provide details:</i>	Yes / No
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		

<p>9. Are you aware of any over or under payments of the SGO allowance to you?</p> <p><i>If yes, please provide details:</i></p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Yes / No</p>
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10. In this section, please provide any additional information in relation to the SGO allowance, or any other changes in circumstance.