



St. Helens
Council

Special Guardianship Policy

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SCOPE

This policy covers all aspects of Special Guardianship Support Services, including assessment for support services and financial support.

RELEVANT LEGISLATION/GUIDANCE

[Section 115 Adoption and Children Act 2002](#)

[Special Guardianship Regulations 2005](#)

[Special Guardianship \(Amendment\) Regulations 2016](#)

[Standardised Means Test Model for Adoption and Special Guardianship Financial Support](#)

1. Provision of Special Guardianship Support Services

1.1 Financial Support

Children We Look After

Where a child has previously been in care of St Helens Borough Council, the department will match the fostering allowance payment made to any foster carer seeking to become the child's Special Guardian at the time the Order is made. This will not include Christmas, Holiday and Celebration payments. Deductions will be made for child benefit and any other credits claimed for the child, such as maintenance payments / child tax credits.

Any overpayment may result in the council seeking reimbursement of sums over-paid to the Special Guardian.

Children in Need

A request for financial support may be made where a child is previously unknown to Children's Social Care or is at risk of coming into care. This will be considered in the Assessment & Support Plan. In these instances, a means test will be undertaken by the SGO Coordinator in Adoption.

In calculating the amount of financial support payable, the SGO Coordinator will utilise the [Standardised Means Test Model for Adoption and Special Guardianship Financial Support](#) (Ref: [Appendix 2: Means Test Guidance](#))

When carrying out an assessment the allocated Social Worker will consider whether financial support over and above any regular allowance is necessary to enable the Special Guardian to care for the child who is subject to the Special Guardianship Order. Such support may include:

- Provision of furniture and domestic equipment
- Provision of clothing, toys, access to transport and other items necessary for the purpose of caring for the child.

Additional payments may be made for such things as special dietary needs, special clothing, severe enuresis, encopresis or complex needs.

These payments will be made at the discretion of the relevant Head of Service, and requests for such payments should be made via the allocated social worker and included in the Assessment & Support Plan. Unless stipulated, these are reviewed on an annual basis.

Please note; if financial assistance can be obtained via other benefit claims and/or health services, discretionary payments will not be made by the local authority.

The allocated Social Worker will consult with the SGO Social Worker through the financial assessment and prior to presenting the SGO Assessment & Support Plan to the relevant Head of Service for approval. Following approval by the Head of Service the decision may be shared with the Special Guardian.

The allocated Social Worker must load the change of legal status to Child in Need on the child or young person's record and notify the SGO Coordinator once the SGO Assessment & Support Plan is approved, on the date of the Special Guardianship Order is made.

Payments will be made on a fortnightly basis.

Private Applications

The Local Authority does not have to assess those Applicant's who are caring for a child who was not previously looked after even if the Applicant is a Special Guardian. In those instances, whereby the request is refused or the outcome of the assessment is not to provide support, The Applicant will be given 28 days to respond. In those circumstance where the Applicant remains dissatisfied, they may make a complaint.

An eligible Applicant (see below) can make a freestanding application to the Court for a Special Guardianship Order.

The applicant is required to provide 3 months' notice to the Local Authority of their intention to apply, with the notice being sent to the Local Authority within which they reside. The Local Authority having received the notice will have a duty to provide a report to the Court. The only exception to the requirement for 3 months' notice is where the Court has granted leave to make the application and waived the notice period.

In these circumstances e.g. for those children not previously known to the Local Authority or for applications not supported by the Local Authority, the prospective Special Guardians will need to instruct their own solicitor to draft the application and represent them in the Court proceedings and be responsible for all associated costs.

Eligible Applicants

- Any guardian of the child;
- Any person who is named in a child arrangement order as a person with whom the child has to live;
- Any person who has the consent of each person named in child arrangement order with whom the child is to live;
- Anyone with whom the child had lived for a period of 3 years (which need not be continuous but must not have begun more than five years before, or ended more than three months before, the making of the application);
- A relative with whom the child has lived for a period of at least one year immediately preceding the application;
- Where the child is in the care of the local authority, any person who has the consent of the Local Authority; Any person who has the consent of those with parental responsibility of the child; Any other person aged 18 and over (other than the parent) may apply for a Special Guardianship Order if they have leave of the Court to make the application.

1.2 Notification to Special Guardians

The relevant social worker must notify the Special Guardian in writing about arrangements to pay them financial support under the scheme and send it out by post to the Special Guardian once signed by the relevant Head of Service within five working days of the Financial Support being agreed.

The Special Guardian will have 28 days to appeal any decision made by St Helens Borough Council by writing to the relevant Head of Service. The decision will then be reviewed by the Assistant Director of Children's Services.

1.3 Payments

Payments will be made through direct payments into a nominated bank account although in exceptional circumstances other arrangements may be made with the agreement of the relevant Head of Service.

Regular payments will be made fortnightly.

Financial support under the scheme ceases to be payable when the:

- a. Child ceases to have his home with the Special Guardian (this does not apply to temporary periods of absence for up to three months – e.g. hospital admission as an in-patient).
- b. Child ceases full-time education or training and commences employment.
- c. Child qualifies in his/her own right for Universal Credit.
- d. Child reaches 18 unless continuing with full-time education or training in which case the financial support will continue until the end of the academic year in which s/he turns 18.
- e. Financial circumstances of the Special Guardian or the child change. Any Special Guardian who is in receipt of Universal Credit will receive the maximum Special Guardianship Allowance. If they become ineligible for Universal Credit, they must inform the council **within 14 days of being notified** failing which they will have their Special Guardianship Allowance terminated or suspended. Please note a review of payments will usually take place in these circumstances.

Special guardians are required to notify in writing the relevant Head of Service using the email address **SGOSupport@sthelens.gov.uk** immediately of any change of circumstances which might, in the context of the original agreement, result in the financial support being increased, reduced or terminated. Any failure to do so may result in the council seeking reimbursement of sums over-paid to the Special Guardian.

1.4 How should Payments be used?

The Fostering Network gives a guide on how fostering allowances can be broken down into percentages under various components.

We also apply this rationale to Special Guardianship payments:

EXPENDITURE	%
Food	30 - 34
Clothing	22 - 26
Transport	7 - 11
Personal & Activities	6 - 17
Household	18 - 30

Variations in percentages are mainly associated with different ages of children and young people.

Whilst this provides a useful guide, it is not intended to be rigid. However, within the categories of clothing, activities and personal items, Special Guardians are expected to be able to evidence expenditure if requested.

Children subject to Special Guardianship should never perceive that they are being treated differently to the carer's own children; carers can be supported in managing this issue sensitively. Consideration should be given to assisting children to budget appropriately; older children must be supported in choosing their own clothes and personal items as a means of supporting them towards independence.

1.5 Review of Payments

An annual review will be undertaken in accordance with this Policy.

An annual review will be triggered by the SGO Coordinator who will ask the Special Guardian to:

- a. Provide evidence that the child benefit continues to be paid (e.g. a copy of the bank statement or most recent allowance statement).
- b. Provide evidence that there has been no significant change in circumstances.
- c. Supply the Finance Officer with details and evidence of their income and outgoings to make an assessment of their continuing need for financial support.

If these requirements are not complied with the Head of Service for Fostering, Adoption and Provider Services, will suspend, or terminate payments 28 days after a reminder has been sent to the Special Guardian for the relevant information. Should payment be suspended and subsequently be reinstated any back payment made will be at the discretion of the Head of Service.

Once the evidence has been received the SGO Coordinator will revisit the details of the SGO Assessment & Plan and complete the Allowance Review Form where there has been a change in circumstances.

If it appears to the council that there has been a change in circumstances within the period before the next annual review, then the review will be arranged at an earlier date.

The SGO Coordinator will present the findings of the review to the relevant Specialist Manager for approval.

Any decision will be communicated to the Special Guardian using the Review of the Financial Assistance Letter.

The Special Guardian will have the right to appeal against any variation of the payment within 28 days of the date of the Letter.

Appeals should be made to Head of Service. The decision will then be reviewed by the Assistant Director of Children's Services.

An annual review will be completed for as long as a Special Guardianship allowance is in place.

1.6 Legal Costs

St Helens Borough Council may provide financial support as a contribution towards, or payment of, the legal costs (including court fees) of a Special Guardian or prospective Special Guardian when a child is in care, or otherwise would be, when associated with:

- a. The making of a Special Guardianship Order or any application to vary or discharge such an order.
- b. An application for an order under the Children Act 1989 section 8.
- c. An order for financial provision to be made for the benefit of the child.

Such a payment will be contingent upon the relevant Head of Service considering that the application is necessary and in the best interests of the child; that any application for an order falling within (a) – (c) above is likely to succeed; that legal advice and/or representation is necessary; and that funding for legal representation is not otherwise reasonably available.

In the majority of care cases where the Special Guardianship Order is part of the Council's care plan for the child, funding for legal advice to the prospective special guardians on the content of the SGO support plan will be agreed up to a maximum of £300 plus VAT equating to 3 hours legal advice at legal aid rates unless the Head of Service determines additional funding is appropriate.

In deciding whether to contribute towards, or pay, legal costs the council will also take into account the financial circumstances of the Special Guardian and the child subject to the Special Guardianship Order other than where the legal costs are in respect of an application for a SGO for a child who is in the care and the council supports the making of a SGO.

The solicitor acting for the proposed Special Guardian will be expected to agree to work at the equivalent of public funding rates and is expected to be an accredited member of the Law Society's Children Panel.

1.7 Family Time

At the time of completing the Special Guardianship Assessment & Support Plan Report for court the agreed plan for family time should be discussed and the contents formally agreed by the prospective Special Guardian(s). The Social Worker should have sought the views of birth parents, and anyone holding parental responsibility and attempt to reach an agreement about the appropriate levels of family time and support prior to the Order being agreed. Where children have siblings in other placements all professionals involved should meet up to ensure any other contact arrangements already in place are not jeopardised by the new plans.

A meeting will be chaired by the relevant Specialist Manager and in cases where contact is contested advice from Legal Services should be sought.

Once the arrangements for family time have been agreed these should be included in the Special Guardianship Support Services Plan (Ref: Special Guardianship Support Services Policy).

The Special Guardians would be expected to supervise family time arrangements where necessary.

Arrangements for family time should be sent to the allocated Social Worker to be included in the SGO Assessment & Plan.

2. Entitlement to Leaving Care Services

A young person upon who is subject to a Special Guardianship Order, upon reaching the age of 16, may be entitled to leaving care services, in line with current legislation.

Having reached the age of 16, the young person will be classed as a 'Qualifying' care leaver if the Special Guardianship Order is still in force, or having reached 18, the Special Guardianship Order was in force when they reached that age. The young person must have been 'looked after' immediately before the making of the Special Guardianship Order to be entitled to leaving care support.

The support 'Qualifying' care leavers are entitled to can be found on the published 'Local Offer' for care leavers. This can be accessed at <https://new.sthelens.gov.uk/careleavers/>

Any Qualifying care leaver is entitled to ask for an assessment of need. This can be done via the 'Futures Team' which is the leaving care service in St Helens. The Futures Team can be contacted at: futuresteam@sthelens.gov.uk

3. Staying Put

When a child is 'eligible' for Leaving Care Services (Section 2) the Head of Service can use their discretion in respect of agreeing to pay the Special Guardian the equivalent of Special Guardianship Allowance, when the young person wishes to remain living with the Special Guardian until they reach the age of 21. (Ref: Staying Put Policy).

4. Additional Support Services

Support is available from the SGO workers within the Adoption Team to help prevent the breakdown of a child's placement and to provide assistance with mediation and contact with birth parents. They can provide additional training and services.

Appendix 1 – Means Test Guidance



STANDARDISED MEANS TEST MODEL FOR ADOPTION AND SPECIAL GUARDIANSHIP FINANCIAL SUPPORT

Introduction

1. The Department for Education and Skills has developed a model means test for adoption and special guardianship financial support. The model has been tested with various local authorities and modifications made as a result.
2. **Please note that this test is a suggested model only.** It is not a statutory requirement for local authorities to use this model in place of their existing system. However, we do recommend its use by local authorities, as we believe that the model developed is fair and that adoptive or special guardian families would benefit from a consistent approach by local authorities.
3. The model proposed is intended to deliver a standard approach to arriving at adoption support or special guardianship support payments (if not always a standard payment), so that adopters and special guardians are treated equitably within the context of what is affordable within existing local authority budgets.
4. For any queries about the model, please contact the Adoption Team on adoption.team@dfes.gsi.gov.uk.

Guidance on using means test model

General

5. The model is based on disposable income, and so provides a thorough analysis of the family's financial situation. Key principles of the test are set out in this section.
6. The regulations on adoption and special guardianship support services¹ set out that there must be no reward element in financial payments other than as a transitional provision for foster carers adopting or becoming special guardians for a child for whom they are currently caring.

¹ The Adoption Support Services Regulations 2005 (SI 2005/691) and the Special Guardianship Regulations 2005 (SI 2005/1109) both available at www.opsi.gov.uk.

7. The overall approach used in the test is a 'snapshot' of the family's current circumstances. By this, we mean that if the adopted or special guardian child is already living with the prospective adopters or adoptive parents/special guardian, then the child should be included in the calculations. If the child is not yet placed with the prospective adopters/special guardian, then the child should not be included in the calculations.
8. If a family is in receipt of Income Support, we recommend that the local authority pay the family the applicable maximum payment without assessing their income/expenditure in this test. The figure paid to the family should not include any deductions for child benefit (as they are in receipt of Income Support).
9. Financial support paid to adoptive parents or special guardians under the regulations cannot duplicate (or be a substitute for) any payment to which adopters or special guardians would be entitled under the tax and benefit system. We recommend that local authorities only include benefits that are currently being paid to members of the household. If the local authority believe that there are other benefits to which the household would be entitled, this should be pointed out to the adopters or special guardian. A reassessment after 3 months could then be made which would capture all of the new benefits being received. This could be the case where, for example, a child has recently been placed with the prospective adopters or special guardian, and they have not yet claimed child tax credit.
10. The test is currently worked out on a monthly basis. If local authorities prefer to use weekly figures, the model can be adapted for this.

PROJECTED FAMILY INCOME

Section 1i - Pay

11. This section should include basic net monthly pay, before any deductions for savings schemes, social clubs, accommodation/food and loans. However, the income figure used should exclude any payments into pension funds.
12. Where one (or both) of the parents or special guardian is self-employed, the only income which should be considered is 'drawings' as this is the equivalent of pay from an employer. Any profit from the business sitting in a bank account (and thereby not being reinvested) should be taken into account as capital under section 1iv: other sources of income.

13. If one (or both) of the parents or special guardian receives overtime, fees, bonus/commission and/or gratuities on a regular basis (for example annual bonuses) should be included as part of the monthly payment (i.e. if the payments are annual, these should be divided by 12 to give a monthly amount to be included in the 'basic net monthly pay' section). If local authorities are using weekly figures, the extra income should be calculated on this basis.

Section 1ii – Benefits and pensions (parents)

14. Where the parents or special guardian receive individual benefits (i.e., those that are not calculated on a household basis) these should be included in this section. If the benefit payments are currently received weekly, please multiply by 52 and divide by 12 to give a monthly amount. Benefits to be entered in this section are:
- Employer's sick pay (after compulsory deductions)
 - Incapacity benefit
 - Statutory maternity, paternity and/or adoption pay and/or maternity allowance
 - Bereavement benefit
 - Working tax credit (if paid directly and not as part of pay and excluding any childcare element received)
 - All pension payments received
 - Other benefits
15. In relation to working tax credit, our understanding is that an employed person currently receives working tax credit within pay from his employer. If this is the case, the amount will be included in the basic net monthly pay section. All those who receive working tax credit will receive an award notice which sets out how much they will receive. This award notice will provide the information needed for this section of the test.
16. Where a childcare element is paid as part of the working tax credit, this should be disregarded for the income section of the test. The existence of this type of credit needs to be considered when completing the expenditure section on childcare (see below).
17. Any other benefits received by the parents, for example help with costs associated with disability or mobility, should be recorded in the 'other benefits' section.

Section 1iii – Benefits (family/children)

18. Where benefits are received by the family or 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:
- Income Support
 - Jobseeker's Allowance
 - Child tax credit per household
 - Child benefit for each child, excluding the child/children who are the subject of this assessment application
19. If a member of the household receives Income Support or Jobseeker's Allowance, the amount per household should be recorded here. Also see paragraph 8 above, where it is recommended that where the only income families receive is Income Support, the applicable maximum payment should be made to the family.
20. Benefits which should be included in this section are child tax credit received for each child, 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.
21. Child benefit should be included for each child living in the household, excluding the child/children who are the subject of this assessment application. Current rates for child benefit can be found by clicking [here](#).
22. Housing benefit should also be excluded from this section, as it is disregarded for the purposes of the expenditure section below.

Section 1iv – Other sources of income

23. Where the family receive income from capital, savings and/or investments, this should 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. Any interest received from Government Child Trust Funds should not be included in this section.
24. If the family receive 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.

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

Boarder/lodger 1

Weekly payment	£55
Deduct £20 (disregard)	-£20
	£35
Deduct 50% of remainder	-£17.50
Income from boarder/lodger 1	£17.50

Boarder/lodger 2

Weekly payment	£60
Deduct £20 (disregard)	-£20
	£40
Deduct 50%	-£20
Income from boarder/lodger 2	£20

26. Where the family receive 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:
- Interest payments on the mortgage (but not mortgage capital payments);
 - Repairs;
 - Council tax (if paid by the family being assessed)
 - Agents' fees; and
 - Insurance (buildings)
27. 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'.
28. The approach used in paragraphs 25 and 26 above is consistent with that used for calculating income from property for the purposes of income tax. 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 needed for this section of the test.

29. Other income to take into consideration includes maintenance payments received for any child in the household and existing adoption or special guardian allowances (including enhancements for special needs) paid for any child. This latter may be paid where, for example, the family have adopted or become a special guardian for a child with a different local authority and therefore receive a separate allowance.

Section 1v – Income relating to the child/children being adopted or becoming a special guardian child

30. This section relates to the child/children being adopted or becoming a special guardian child only. 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.
31. Payments from Criminal Injuries Compensation Awards should not be included. Any interest received from Government Child Trust Funds should not be included in this section.
32. Please also consider any other income to which the child/children might be entitled. This section does not record child benefit for the adopted or special guardian child, which will be deducted from the final payment resulting from this means test.

Income calculation

33. The means test spreadsheet will automatically calculate the household monthly income, and will also apply a 20% disregard to this income figure.

PROJECTED FAMILY EXPENDITURE

Section 2i – Home expenditure

34. 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.

Section 2ii – Other outgoings

35. Where the family pay regular monthly repayments on loans for housing improvement (e.g. extensions/new kitchens) or transport costs (e.g. new car), we suggest that these are included in this section. Local authorities will need to decide in relation to the individual circumstances as to whether a loan repayment should be included here. Some loans may have been taken out by the adoptive or special guardian family to meet a new need incurred as a result of the adoption or special guardianship order (e.g. buying a larger car).
36. 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.
37. The section for 'reasonable' child care costs will need to be determined by each local authority 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.

Section 2iii – Core regular family expenditure

38. General household expenditure on items such as food, transport, clothes, recreation should be calculated using the Income Support allowance rates but increased by 25%. The latest rates can be found by clicking [here](#). The calculations below are based on the rates for 2005-6 as an indication:

Personal Allowance	Normal monthly rate	125% of normal monthly rate (for use in this means test)
Single adult aged 16-17	£146.68	£183.35
Single adult aged 18-24	£192.83	£241.04
Single adult aged 25 or over	£243.53	£304.41
Couples both aged 18 or over	£381.98	£477.48
Lone parent aged 16-17	£146.68	£183.35
Lone parent aged 18 or over	£243.53	£304.41
Dependent children	£190.15	£237.69

39. In completing the means test, local authorities will need to calculate the appropriate figure for the family being assessed. For example, for a household with a couple (parents) and 2 dependent children the core regular family expenditure should be recorded as £952.86 (made up of couple's allowance of £477.48 and 2 allowances for dependent children of £237.69 each).

CALCULATION

40. The spreadsheet will calculate the household's monthly disposable income.
41. Local authorities will need to enter the appropriate maximum payment for the household, depending on the number and age of the child/children being adopted or becoming special guardian children, and the circumstances of the child e.g. special needs.
42. We understand that most local authorities will have a payment structure for fostering allowances consisting of a core allowance paid for all children, plus enhancements linked to, for example, special needs. This payment structure will be linked to local variations in the cost of living and individual local authority budgets. We recommend that adoption and special guardianship maximum payments are tied to these allowances. This would result in a different maximum payment in individual cases, determined by the needs of the child, against which amount the test is run.
43. After the local authority maximum payment has been entered manually, the box marked 'amount of payment to adopters or special guardian' will show the payment that the test has calculated for adopters or the special guardian. This amount is calculated on the following basis:
- Where the family's disposable income is less than £0, the spreadsheet will show the local authority's maximum payment. This is because the adopters or special guardian have 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 a figure that is a percentage of the maximum payment. As the disposable income figure rises above zero, the percentage of the maximum payment that the adopters or special guardian be tapered at a set rate of 50%. This rate means that for every pound of monthly disposable income a family is found to have, they will have 50 pence deducted from the monthly maximum payment.

44. We understand that many local authorities determine payments to adopters or special guardians based on the allowances they pay foster carers, and then deduct child benefit from the final amount. This is to reflect that child benefit can be claimed by adopters and special guardians but not foster carers. The appropriate amount of child benefit for the child/children who are the subject of the test should be entered into the spreadsheet. Please note that the maximum payment used to calculate the payment to adopters should not take into account any child benefit the adopters might receive (i.e. should not deduct it) as the spreadsheet allows the child benefit to be deducted after the payment has been calculated.
45. The final payment shown will be the calculation of the means test minus child benefit entered by the local authority.

Appendix 2 - SGO Confirmation Letter



ST HELENS
BOROUGH COUNCIL

Children and Young Peoples Service
PO BOX 512
St Helens
Merseyside
WA10 9JX

Contact: Tracy Sexton
Tel: 01744 676563
Fax:
tracysexton@sthelens.gov.uk
Our ref:
Your ref:

Dear....

Application for Financial Assistance under a Special Guardianship Order in respect of

Subjects Details:

Date of SGO:

Your Social Worker has requested that the Local Authority financially support the placement of the above named child who is subject to a Special Guardianship Order.

I can confirm that the Local Authority will continue to financially support the placement as outlined in the table below, subject to an annual financial review.

Your financial support will continue until

Financial Support Agreed on the basis of Financial Assessment

Payment will be made fortnightly.

The allowance will cease on expiry of the Order or earlier if the child does not remain in your care, obtains full time employment, leaves your home to live independently or if the Order is rescinded by the Courts.

It is your responsibility to notify the Local Authority of any of the above changes including change of address, contact details or financial changes.

If there are any elements within this document which you do not agree with, please contact us within 28 days of the date of this letter.

Yours sincerely

Head of Service

Appendix 3 - Allowance Review Form

ALLOWANCE REVIEW FORM SPECIAL GUARDIANSHIP

Date:

Name of Child	
Name of Carer	
Address of Carer	

Outcome of Financial Assessment Review	
Any changes	Yes <input type="checkbox"/> No <input type="checkbox"/>
New financial assessment required	Yes <input type="checkbox"/> No <input type="checkbox"/>
Details/Comments	

Service Provision (Special Guardianship)

Are the services detailed in the Special Guardianship Support Plan still being provided and used?

Service	
	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Yes <input type="checkbox"/> No <input type="checkbox"/>
Any Comments	

Has there been any change in circumstances that would affect the provision of support services or financial payments?

Please detail below

Does the child still live with carer?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Has the child started work?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is the child in receipt of any benefits?	Yes <input type="checkbox"/> No <input type="checkbox"/>

If yes, please state which benefit and how much	
Has the Special Guardian provided details and evidence of their income	Yes <input type="checkbox"/> No <input type="checkbox"/>
Please state their income	

Any Other Information

Review Decisions (To be completed by Service Manager)			
Signature		Date	
Next Review due			

Appendix 4 – Annual Review Letter

People's Services Department
Atlas House
Corporation Street
St Helens
Merseyside
WA9 1LD
Tel: 01744 671603
Fax: 01744 671270

Dear

As you are aware following your last review it is a requirement that an annual review is undertaken on all children on SGO. You are again required to complete and supply the local authority with an annual statement as to the following matters:

- Financial circumstances
- The financial needs and resources of the child
- Your address and whether the child is still living with you.

I will be undertaking a financial assessment and have included a template for you to complete and return. If you require any assistance in completing this, please do not hesitate to contact me for advice and assistance.

You have a responsibility to notify us of any changes including if the child:

- No longer lives with the Special Guardian
- Ceases full time education and starts work
- Qualifies for income support or job seekers allowance in their own right
- Reaches the age of 18

It is essential that the local authority are notified of these changes as we may suspend or terminate payments of financial support and seek to recover overpayments made.

It is also essential that you contact us if you change your address otherwise, we will suspend payments if our post is returned until you get back in touch with us with your new address.

St Helens have in the past year been working hard to develop the SGO service. We are available to offer you advice and guidance if you require any support. We are also looking to develop what we offer to you regarding accessing various training courses which will help to support you in your role.

St Helens have signed up to Family Action who are supporting our Special Guardians. If you have not received a copy of the leaflet with log in details which explains what the service offers, please get in touch and we will send you a copy.

I would be grateful if you could respond to this letter by

Yours Sincerely
Katharine Radclyffe
Service Lead Fostering and Adoption

Appendix 5 – Financial Review Form

ST HELENS CHILDREN AND YOUNG PEOPLE'S SERVICES FINANCIAL ASSESSMENT FORM



Name of Carer		Home Telephone		Mobile:	
Address:		Email:		Postcode	

Allowance in respect of				Nursery/school/college
Name	DOB	Age	GP surgery	

Please note that you **must** make us aware of any change of address, contact details etc.

Support Plan Review	Please indicate "Yes" or "No" and give details if appropriate
Does the child/children still live with you at the listed address?	
Does the child have an EHCP? (Education, Health and Care Plan)	
Does the child/children have any health conditions? (Please give details)	
Do you currently have any emotional or behavioural concerns relating to the child/children? (Please give details)	
Have you attended an SGO Support Group in the last 12 months?	
Are you aware that your child/children may qualify for free therapy and assessments through the Adoption Support Fund? (Please indicate if you would like more details of this service)	
Are there any other areas of the SGO you would like to discuss? (Please give details)	

Please sign declaration on reverse side of this form

Income & Expenditure	Amount in £ per
Approximate monthly income (employment , benefits, child tax credits etc)	
Mortgage payments (capital and interest) including any endowment payments linked to mortgage	
Rent (after any housing benefit payable)	
Council tax (after any council tax benefit payable)	
Loan repayments for essential purposes (see guidance notes)	
Maintenance payments	
Court orders	
Private pension contributions	
National insurance if self employed	
Reasonable child care costs including nursery fees (after any childcare element paid as part of the working tax credit)	
Total	

Declaration:

I/We understand that failure to disclose income or to notify St Helens Children and Young People's Services of any changes in my/our financial circumstances in order to secure an allowance may lead to legal proceedings for their recovery.

I/We confirm that the children above continue to be cared for by me/us.

Should the child/ren cease to be cared for by me/us I/we will notify the local authority immediately. This is outlined in the SGO support Plan and in line with St Helens Borough Council's Special Guardianship Order policy.

Special Guardian
Signature(s)

Date

**Appendix 6 – Financial
Review Outcome letter**



ST HELENS
BOROUGH COUNCIL

Children and Young Peoples Service
PO BOX 512
St Helens
Merseyside
WA10 9JX

Contact: Tracy Sexton
Tel: 01744 676563
Fax:
tracysexton@sthelens.gov.uk
Our ref:
Your ref:

Dear

Review of Financial Assistance under a Special Guardianship Order in respect of

The review of your Special Guardianship Allowance has been undertaken and I can confirm that there will be

Option 1 - No change to your SGO financial support at this time
Option 2 – The following changes as detailed.

If you need to discuss this further, please contact the department on 01744 671199.

Yours sincerely

Head of Service

Appendix 7 – Initial Financial Review

Applicants Name(s)
Date of Assessment

PROJECTED FAMILY INCOME			
SECTION ii – Pay	Disregard	Weekly Amount	NOTES
EARNINGS: (After Deductions, excl pension)			
SELF EMPLOYED: (Drawings)			
OTHERS: (Bonuses/Commission/Gratuities)			
SUB TOTAL		0	
SECTION iii – Benefits and Pensions (Parents)			
Employment and Support Allowance			
Incapacity Benefit			
SMP/MA/ Paternity and/or Adoption Pay			
Bereavement Benefit			
Working Tax Credit			
ALL Pension Payments RECEIVED			
Disability Working Allowance			
Sickness Benefit			
Disability Living Allowance - Care			
Disability Living Allowance - Mobility			
Invalid Care Allowance			
Severe Disablement Allowance			
Industrial Injury Benefit			
SUB TOTAL		0	
SECTION iii – Benefits (Family/Children)			
Income Support			
One Parent Benefit			
Job Seekers Allowance			
Child Tax Credit (per household)			
Guardians Allowance			
Child Maintenance			
Child Benefit (excl adopted SGO Child/children)			
SUB TOTAL		0	
SECTION iv – Other Sources of Income			
Boarders/Lodgers			
Rent Received			
Maintenance Payments Received			
Existing SGO / Adoption Allowances			
SUB TOTAL		0	
SECTION iv – Income relating to the child/children being adopted/SGO			
Savings/Trust Fund/Property –Interest Only			
SUB TOTAL		0	
TOTAL FAMILY INCOME (A)		0	
DISREGARDED INCOME		0.0	
NET FAMILY INCOME		0.0	

ASSESSMENT FORM FOR SPECIAL GUARDIANSHIP ALLOWANCE - 2023/24

APPLICANTS NAME

0

PROJECTED FAMILY EXPENDITURE			
SECTION 2i – Home Expenditure	Disregard	Weekly Amount	NOTES
Mortgage Payments (Capital & Interest)			
Endowment Payments			
Rent (After any deductions of housing benefit)			
Council Tax (Less Council Tax Benefit/Discounts)			
SUB TOTAL		0	
SECTION 2ii – Other Outgoings			
Loan Repayments (Housing Improvements/Car Upgrade Only)			
Bedroom Tax			
Maintenance Payments			
Court Order Payments			
Private Pension Contributions			
National Insurance (Self-Employed/Unemployed)			
Child Care Costs (Deduct childcare element of WTC)			
SUB TOTAL		0	
SECTION 2iii – Core Regular Family Expenditure			
Couple (Both carers over 18)		179.14	
SUB TOTAL		179.14	
TOTAL FAMILY EXPENDITURE (B)		179.14	
CALCULATION			
Maximum Payments (Less Child Benefit per Child)			
Child Aged 0-4		250.00	Change depending on Level of FC refer to FC payment guide.
Child Aged 5-10		250.00	
Child Aged 11-15		250.00	
Child Aged 16+		250.00	
Allowance to be paid			
Less Child Benefit			
Less Child / Working Tax Credit			
Allowance Entitlement		0.00	
Allowance to be paid per week per child			
With effect from			