

# Guidance for Special Guardians:

## Arranging a Financial Assessment

If you require financial support in order to care for a child as a special guardian you will be required to complete a financial assessment. This will determine your eligibility and the amount of allowance you may be entitled to receive. This assessment will also assist in ensuring that you are claiming all benefits that you are eligible to claim.

Any allowance is subject to an annual financial re-assessment. You will need to notify the local authority immediately of any changes in your circumstances.

To be eligible the child must have been in the care of the local authority.

### **Special guardianship financial assessment process – assessment visit**

The social worker for the child/ren will arrange an assessment visit with you to talk to you about your financial circumstances. This will include:

- details about your circumstances;
- whether an assessment for financial support is necessary to ensure that you are able to care for the child or children concerned;
- whether other people who have parental responsibility for the child/ren are able to make a contribution towards the cost of care and whether this amount is sufficient;
- the names and dates of birth of household members, next of kin, family support and other support networks;
- your housing and financial situation;

We will provide you with information:

- about the process for financial assessments;
- about local services that may be able to offer practical support;
- opportunities for taking a break from caring now and again or care for a child during the day whilst you are at work,
- pre-school nursery care,
- pupil premium received by schools,
- free school meals where either you or the parents are in receipt of benefits, child benefit and tax credits.
- Relating to the Family Information Service which provides advice to parents and carers on a full range of child care related matters.

The assessment visit is an opportunity for you to ask questions and find out what support might be available to you and your family. The social worker will listen carefully to what you have to say, your views, plans and concerns about caring for the child both now and in the longer term.

## **The financial assessment process**

If it is agreed that an assessment for financial support is necessary, a financial assessment will need to be completed.

The financial assessment is completed by a finance officer from the Financial Assessments & Benefits Advice Team. The finance officer will discuss with you what are reasonable costs and expenses. As part of the financial assessment they may also give you advice on welfare benefits so you may be able to increase your income by claiming benefits you may be entitled to.

If you are happy to proceed with a financial assessment, you will need to provide documentary evidence of your financial information. This will include things like:

- benefit award letters including state pension details and housing benefit awards;
- occupational pension;
- rent/mortgage and council tax;
- bank/building society statements, savings accounts, PEPs, ISAs etc.
- Trust funds, bonds and any other income.

Also recent receipts for outgoings detailed below:

- loan repayments for essential purposes;
- maintenance payments, court orders, private pension contribution, national insurance if self-employed;
- child care costs;

## **What happens next?**

The financial assessment is completed using the Department of Education Standardised Means Test Model for Adoption and Special Guardianship Financial Support.

The total amounts of your income, capital and savings will be added together and from this the first 20% is disregarded. Housing costs such as mortgage/rent payments and council tax and other outgoings are deducted in line with Standardised Means Test Model for Adoption and Special Guardianship Financial Support.

Following the assessment you will receive a letter advising you of the outcome of the assessment. If you are unhappy with the outcome of the assessment, you can ask for your assessment to be reviewed by contacting the Operations Manager for the Children's Social Care and Safeguarding Team. You can also contact the Customer Relations Team on 01926 410410.

### **What if you do not wish to have the financial assessment?**

If you do not wish to complete a financial assessment, we will conclude that you do not wish to have your eligibility for a special guardianship allowance assessed and no further action will be taken.