

Policy Circular

Document No 08/08

Owner: Strategy & Communications Directorate

Subject: Financial Management Support

Version: 1 of 1

Last Amended: 1 April 2008

Date Reviewed: 10 June 2010

Next Review: June 2012

1.0 Background

Some ILF users are unable to hold a bank account or feel unable to manage their ILF monies.

Some people choose to have a family member or representative assist them with their financial affairs or have their ILF monies paid into a totally separate bank account for them.

Some people may prefer to have a professional organisation manage their ILF monies. Certain organisations are able to offer this support to users by monies being paid into either a unique or shared bank account. A fee is generally charged for this service.

2.0 Policy

The Fund will not normally pay for financial management support provided by a relative who lives in the same household, in line with normal policy.

Independent Living Fund

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Email: funds@ilf.org.uk, Website: www.dwp.gov.uk/ilf

It is the ILF preferred position to pay its monies directly into the bank account of the ILF user. It is however acknowledged that this may not always be practical or desirable for the user.

Where a user requests that their ILF monies are paid to a third party organisation the ILF can include within its offer an amount to pay for the fee required for this service where this charged. The service will include operating a bank account on the user's behalf or receiving ILF money into a general/shared account and managing it on the users behalf and paying any care bills or invoices.

Where a request is made to pay for a private individual to supply this support to a user this may be allowed providing the case-holder is satisfied about the level of support that will be provided as part of the service.

This should not be confused with a payroll service. Payroll is a different service and ILF has a separate policy to deal with this.

The normal maximum that the ILF will pay for this fee is £6.25 per week. This amount should not be assumed to be the automatic requirement and where an organisation charges less than this the lower amount should be included. Where a user requests that an amount greater than this is paid and a reasonable explanation is given as to why a higher cost should be met the section manager may agree to this. Any such decision should be noted on the user records.

It is suggested that at the point an ILFA revisit takes place where an amount has previously been included to pay the fees for an organisation to manage a user's ILF money the ILFA checks that this is still required.

Any user can request that the ILF fund this service whether they engage the services of an agency, use self employed support, or employ their own PAs.

3.0 Source

Trustees meeting 12 March 2008

Trustees meeting 9 June 2010

4.0 History Date Reviewed

17 September 2008

10 June 2010

Equality Impact Assessment

Screening Template

This preliminary impact assessment form is to help you screen your policy, project, function or new service. It should help you consider whether a full Equality Impact Assessment is required by looking at whether there is a potential negative or positive impact on any of the equality groups, if there is an opportunity to promote equality, and whether further data is needed.

Title of policy, project, function or service:

Financial management support policy document (users)

Short description of aims and objectives

The policy enables users to receive a sum of money to pay either an individual or an organisation to manage their ILF monies

Thinking about each group below, does (or could) the policy, project, service or function have an impact on members of each equality group? If so, how?

Equality Group	Yes – negatively	Yes – positively	Unclear	No impact
Age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Race	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Transgender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sexual orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Religion or belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Socio-economic groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

What information or research has been considered in judging these impacts?

This policy can be applied to all users who wish to pay somebody to manage their ILF monies.

You should consider a full Equality Impact Assessment (EIA) if:

- (a) you feel one or more equality groups will be negatively impacted by the policy, project or service, or
- (b) there is an opportunity to promote equality and eradicate discrimination.

You may also consider further research if it is unclear, at this stage, what the impact may be.

Based on your findings, is a full EIA required?

Yes

No

Please provide a short summary of your decision-making below:

The policy can be applied to all users. It enables people who are otherwise unable to manage money to receive and use an ILF award.

Notes:

- The completed EIA Screening Template should be sent to Jon Duckworth, User Liaison Manager for approval by the Equality Impact Assessment Board (EIAB).
- We will contact you with any comments or queries about the completed form.

**This form was
completed by:**

Helen Sanderson
