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MATTERS ARISING

98.30

Regular Payments - A Brief History

As requested at last meeting, please find enclosed details of regular payments and information sent to registrants and professionals regarding the policy developed concerning regular and single payments.

CONFIDENTIAL



GRANT ALLOCATIONS POLICY

FOR PROFESSIONAL USE

Payments from the Trust will be of two kinds:

- 1 Single payments
- 2 Regular payments – towards the cost of heating, diet or laundry, etc.

Single Payments

Single payments will cover a wide range of items within the terms of the Trust Deed. Payments must be related to need, but this does not mean only financial need. Help is often needed to relieve the stress of living with HIV infection and payments will be made where there is such a need. Holidays or family outings are two examples, but there are many other things which could be considered. There will be payments to assist with costs related to managing illness and maintaining good health; examples of these would be clothing, bedding, washing machines or driers.

Single payments will be made on the basis of need in a broad sense, not based on income. Many families which seem "better off" find that their standard of living has fallen, giving rise to difficulty. It is hoped that these families will make application to the Trust, when there is a need.

Single payments will be available to:

- a People with haemophilia who are HIV positive, and to the families and dependants of these people.
- b Wives and children of those people who had haemophilia, were HIV positive and who have died. Children will be eligible for single payments until they complete full-time education, or reach 18 years, whichever is later.
- c Parents caring for a son with haemophilia who is HIV positive, provided the son lives with them. If the son has died, payments may be made where the need is related to HIV.

All grants are authorised by the Allocations Sub-Committee of the Trustees, which normally meets once each month. However, this Committee has delegated authority to the Administrator and Social Worker to make immediate payments of up to £500 which fall within certain guidelines.

Requests for larger sums or which fall outside the routine guidelines will be dealt with at the next monthly meeting, except in extreme urgency when special arrangements can be made for early payment.

Payments will not be made for items normally provided by the local authority or Department of Social Security. In the case of funeral costs, single payments will be considered for reasonable costs not covered by Social Fund Payments, and also towards the cost of providing a simple headstone.

Payments from the Trust will not affect entitlement to Social Security benefits and need not be declared to the Department of Social Security. Claimants applying to the Social Fund shall not be asked about payments from the Trust, nor should they be told to apply to the Trust instead of the Social Fund.

Frequency of payment – each application will be considered on its merits, therefore there will be no restriction as to how often a person may apply.

Applicants may ask that a decision be reviewed. Review will be by the full board of Trustees.

Regular payment

This system of payments is intended to top-up the income of people on low income, whether from low wages or from benefits. It is aimed at assisting those people who are finding it difficult to meet the cost of heating, diet etc, particularly those on benefit who were unable to obtain an additional allowance for these costs.

The regular payment is meant to relieve the constant worry over basic day to day living costs that some families are experiencing. It will be assessed on the basis of weekly income and expenditure, but will probably be paid on a monthly basis.

Regular payments will be available to people with haemophilia who are HIV positive and meet the conditions explained below. They may also be available to dependants of people with haemophilia who have died as a result of HIV/AIDS.

People who qualify for the regular payment will still be eligible for single payments.

The amount of the payment is based on trying to ensure that the net (disposable) income of a household will not fall below a level which allows adequate heating and diet and some balance to maintain the quality of life.

The 1990 Policy

The policy of emphasis on the regular payments has three purposes:

- ☐ To supplement the standard of living in order to help meet the extra costs arising from living with HIV;
- ☐ To give individuals as much choice as possible on how money is spent in accordance with their own priorities, and thereby;
- ☐ To relieve individuals of the need for repeated requests for assistance with day to day needs.

Since this policy was introduced in the last quarter of 1990 the amount of spending power put directly into the hands of individuals (Regular and Winter Payments) has risen from 64% of overall Trust expenditure in 1989-90 to 83% in 1991-92. These percentages are of total sums which have been maintained or increased during the period.

Trustees have in this time been able to concentrate expenditure on Single Payments into the areas most directly connected with health or sickness. Very few grants are now made for ordinary household costs.

The 1992 Review

The Trustees reaffirmed their agreement on the principles of the 1990 policy.

The Trustees agreed that there can be no guarantee that the level of regular payments can (or even should) be maintained at any particular level, and that these payments should not be regarded as index linked.

The Trustees will however continue to examine the needs of the community, recognising that these needs may change in nature or in quantity, and will make such adjustments as resources will allow.

For the current year the Trustees have agreed that a limited increase should be made in the total annual amount spent on regular payments. This will be applied according to relative needs and hence some small changes of emphasis are being made.

At the same time the opportunity is being taken to simplify the system and to eliminate some inequalities that have arisen. The changes proposed are intended to make the system easier to understand, easier to administer, and simpler for making any future adjustment which may become necessary.

A major part of this simplification is to consolidate the additional payments (those over the Higher Standard Rate) at certain fixed levels. This will enable greater consistency and fairness compared with previous levels calculated on an individual basis, which produced too many variations.

The other main change which will be noticed, is the introduction of the equal monthly payments (as already explained on page 1).

Introduction of the New Rates

A full table of all the new rates is shown on the opposite page. This includes a reminder of the conditions of eligibility for the various different rates. These will be brought into effect for the payment made on 16th July.

You do not need to do anything, but if there is something you do not understand please telephone the office - *but please wait until after the July payment.*

Finally, as part of the restructuring we are examining every individual payment, well over 900 of them. We do our best to get everything right, but if you think you should be in a higher category please let us know. It may be that we have made a mistake or it may be that we are still waiting for some information that we have asked from you.

Helpline



071-233 0342

Winter Payments

The Trustees have agreed that the supplementary Winter Payments will be made again in 1992 on the same terms as before. The amount per person will be £475 and this will be paid in November as a separate payment from the regular payment.



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NEWSLETTER Number 10 - APRIL 1991

TRUST GRANTS POLICY

Present policy and procedures

The increased level of regular payments announced in Autumn 1990 (Newsletter No. 5) is now fully in effect. This includes (at least at basic level) all persons who request payment, and has considerably increased the amount paid to those on lowest incomes.

The further part of this change, dealing with widows and other dependants, was published in March (Newsletter No. 9) and will be implemented within the next few weeks.

This has increased the annual rate of expenditure on regular payments from £815,000 in September 1990 to £1,340,000 at April 1991, an increase of £525,000 or almost 65%.

As stated in Newsletter No. 5, the intention behind this change was to move the balance between single and regular payments towards the regular payments, a process the Trustees believed would have two advantages (quote):

- "1. It gives individuals more options in making their own decisions on expenditure, and
2. It enables the assistance to be more easily adjusted in favour of those whose financial need is greatest."

The intention was therefore that the increase in personal income provided would lead to a reduction in the need for single grants and recent experience appears to justify this view.

Consequently single grants will in future be restricted to health related issues and grants for household expenditure will only be made in exceptional circumstances. Grants will not normally be made for routine expenses, nor for occasional expenses such as maintenance and redecoration of property or the replacement of appliances or furniture.

By this means the Trustees did not and do not intend or expect to achieve any overall economies compared with previous rates of expenditure but they do at least expect to be able to level off what have been steadily increasing costs and thus to give time to examine carefully the implications of the settlement payments.