

KENT SHARED LIVES

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(23) Management of People's Money, Valuables and Financial Affairs

It is the policy of Kent Shared Lives to support people in Shared Lives placements to achieve the maximum possible level of independence and to make informed choices and decisions in all areas of their life. This includes, where possible, the independence to manage their own financial affairs.

Information held by Shared Lives and the Shared Lives Host about the finances of people in Shared Lives placements is subject to the Shared Lives policy on confidentiality.

Shared Lives recognises its responsibility to protect people in Shared Lives placements from financial abuse and Shared Lives hosts from accusations of financial impropriety and will fulfil this responsibility through the provision of information and support, through monitoring compliance with financial procedures and through a clear code of conduct with regard to the financial affairs of people in Shared Lives placements.

Procedure

1. Kent County Council (KCC) Social Work team will record the level of support required to enable the individual to manage his/her own finances and any agreed limitations on this in the individual care and support plan and ensure that this is subject to regular review.
2. Shared Lives will ensure that the Shared Lives Host has the necessary skills and knowledge to promote and support the Individuals' financial independence as agreed in the care and support plan, to enable him/her to:
 - Develop personal budgeting skills; and
 - Have access to his/her personal financial records; and
 - Consult in private on his/her finances; and
 - Obtain professional and neutral advice on personal insurance; and
 - Store his/her money and valuables in a safe place in the home or elsewhere.
3. Shared Lives will provide any support or tuition identified as necessary to ensure that the Individual, where possible, and as agreed in the care and support plan, is able to manage their own financial affairs

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4. Where the care and support plan identifies the need for the Shared Lives Host to act as a representative for the person placed with them, Shared Lives will:
 - Ensure that the Social Work team care and support plan set clear limits on the support required.
 - Shared Lives Host's power to make financial decisions on behalf of the person placed and the procedure to be followed when a decision is needed on a financial transaction that exceeds those limits; and when necessary use the Mental Capacity act to make best interest decisions.
 - Ensure that the Shared Lives Host understands their responsibility to keep clear records of any financial transaction undertaken on behalf of the person placed with them in line with the Shared Lives policy on record keeping.
 - Provide the Shared Lives Host with the support that they need to meet these requirements and monitor their compliance through the regular inspection of financial records.

5. Shared Lives recognise the vulnerability of Shared Lives Hosts and workers to accusations of financial impropriety. To protect Shared Lives Hosts and workers from such accusations Shared Lives code of conduct includes the following requirements:
 - Should any Individual in the Shared Lives scheme be unable to manage or maintain their own finances without appropriate support from the Host, a capacity assessment must be completed by the Social Work team, and the allocated Social Work team incorporate the specific support needs into the care and support plan.

The care and support plan is a legal document as part of the Care Act.
 - The Shared Lives service will record any financial arrangement in the Shared Lives passport.
 - Shared Lives workers and Shared Lives Hosts, and/or their family members, must never have any involvement in the drawing up or witnessing of the placed Individuals will;
 - Shared Lives Hosts, and/or their family/household members must not hold Power of Attorney for either Property and Finance or Health and Welfare for ANY Individual receiving their support.
 - In the event of an Individual loses capacity to manage their own finances, the allocated Social Work team should complete a capacity assessment and either refer to Client Financial Affairs (CFA) or identify a family member who could manage the finances on behalf of the individual.
 - Shared Lives Hosts, and/or their family/household members must not act as appointees for the Department of Work and Pensions (DWP). Should the

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Individual receiving support be unable to access the DWP, a request can be made for a 3rd party to support the Individuals with this access.

- Shared Lives workers and Shared Lives hosts, and/or their family members, must not enter into any personal financial transaction with the placed Individual;
- Shared Lives workers and Shared Lives Hosts, and/or their family members, must not accept gifts (monetary or material) from Individuals other than small token presents such as those given at Christmas or for a birthday;
- Shared Lives workers and Shared Lives Hosts, and/or their family members, must not accept articles (furniture, ornaments, jewellery, linen etc.) from the placed Individuals family home.
- If supporting an individual with making purchases through the internet, Shared Lives hosts must ensure that no personal and/or financial information about the person is stored on the websites. These must be entered afresh each time a new purchase is made.

Existing support arrangements regarding finances will be considered on an individual basis when an individual is transferring over to the Shared Lives service. It will be recommended that the Appointeeship be withdrawn.

6. When supporting the Individual with banking arrangements:

- The Host will not hold the banking card or PIN number unless this is agreed with the Social Work team and written in the care and support plan.
- KCC Social Work team will carry out a capacity assessment if an individual lacks capacity to manage the storage and withdrawal of their finances. A best interest decision may be required with agreement on how the Shared Lives Host will support the Individual with this.
In an ideal situation, the Individual should be supported to withdraw money at the bank counter and not from a cash machine.
- The Social Work team and Shared Lives Officer will carry out a risk assessment if the Shared Lives Host has access to the Individuals Bank card and PIN details.

KCC Shared Lives Form: Record of Individuals Monies (SL 32)