



Support with Money Policy

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Owner:	Neil Armstrong	Job Title:	Assistant Director, Care & Support
To be issued to: (check as needed)			
<input checked="" type="checkbox"/> Board of Management <input type="checkbox"/> All Staff <input type="checkbox"/> ET/SLT <input type="checkbox"/> Head Office Managers <input type="checkbox"/> Head Office Staff <input checked="" type="checkbox"/> Finance <input type="checkbox"/> Housing <input type="checkbox"/> Asset <input type="checkbox"/> ICT		<input type="checkbox"/> OD <input checked="" type="checkbox"/> Compliance <input checked="" type="checkbox"/> All Care & Support <input type="checkbox"/> C&S Managers (RM, OM, CSM) <input type="checkbox"/> C&S Staff <input type="checkbox"/> Contractors <input checked="" type="checkbox"/> Agency Staff <input type="checkbox"/> Unite the Union <input type="checkbox"/> Employee Voices Group <input type="checkbox"/> Other: _____	
Method of Delivery: (check as needed)			
<input checked="" type="checkbox"/> Learn Pro <input type="checkbox"/> Board Portal <input checked="" type="checkbox"/> Line Manager to Share (e.g. Agencies)		<input type="checkbox"/> Policy Owner to Notify (e.g. Contractors) <input type="checkbox"/> Other: _____	
Stakeholder Consultation Completed (check as needed)			
<input type="checkbox"/> Board of Management <input type="checkbox"/> All Staff <input type="checkbox"/> ET/SLT <input type="checkbox"/> Head Office Managers <input type="checkbox"/> Head Office Staff <input type="checkbox"/> Finance <input type="checkbox"/> Housing <input type="checkbox"/> Asset <input type="checkbox"/> ICT		<input type="checkbox"/> OD <input type="checkbox"/> Compliance <input type="checkbox"/> All Care & Support <input checked="" type="checkbox"/> C&S Managers (RM,OM, CSM) <input type="checkbox"/> C&S Staff <input type="checkbox"/> Contractors <input type="checkbox"/> Agency Staff <input type="checkbox"/> Unite the Union <input type="checkbox"/> Employee Voices Group <input type="checkbox"/> Other: _____	

Version Control

Date	Owner	Version	Reason for Change
March 2023	Neil Armstrong	7	Cyclical review
August 2024	Lesley McDonough	8	To give emphasis in quality assurance processes within audits

Summary of Changes

Section	Change
All	Transferred to new Policy template OMT to LT
5.0	Updated - Codes of Practice for Social Services Workers and Employers (SSSC, 2024) Included - Health and Care (Staffing) (Scotland) Act 2019
13.1	Included how this policy will be monitored via health and safety quarterly reports and quality assurance processes.

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1.0 Ark's Values

Ark's values are true to the core purpose of the organisation and the services we deliver. They determine our behaviours towards one another and what we should expect in our relationships with one another. Working within the following values will guide and help us deliver our vision and mission of Ark being an organisation where everyone is equal:

Trust

We have confidence in our people to deliver excellent services and trust in them to do so. We will develop trusting and honest relationships and our customers will feel assured that they can rely on us to deliver.

Respect

We treat everyone fairly and we listen. We are respectful of each person with whom we come into contact and expect our people to respond professionally and treat others as they would wish to be treated.

Understanding

We will operate with empathy and compassion and approach each situation with an open mind. We will question and challenge to ensure we achieve the right outcomes for customers and our people.

Equality

We believe everyone is equal and expect our people to create positive experiences where everyone feels valued and included.

Integrity

We will do the right thing and take responsibility for our actions. We will work together to uphold the highest standards of behaviour and practice.

2.0 Purpose

This policy and its associated procedures detail how we will support people using Ark Care & Support services with their finances.

3.0 Policy Statement

Ark may provide support to people with their finances if this is an assessed need. Ark Care & Support services will provide support of the least restrictive method necessary in order to uphold the individual's human rights. We will balance this with our obligation to minimise the risk of harm to the people we support.

Ark Care & Support services will always seek to maximise the individual's choice and control by supporting people to develop skills to manage their money and subsequently reduce support in this area, where possible. Support with finances will always be the minimum required by the individual according to their abilities.

4.0 Scope

This policy and associated procedures applies to all Care & Support teams providing support with finances to an individual. It includes agency staff, volunteers and students undertaking direct practice with supported people on behalf of Ark.

This policy is not relevant to service-level financial activities that do not directly include supported people; for example, budgets or petty cash.

5.0 Legal/Regulatory Framework

This policy and associated procedures are written with regard to the following:

- Adults with Incapacity (Scotland) Act 2000;
- Human Rights Act 1998;
- Equality Act 2010;
- Health and Social Care Standards (Scottish Government, 2017);
- Codes of Practice for Social Services Workers and Employers (SSSC, 2024);
- Health and Care (Staffing) (Scotland) Act 2019.

6.0 Responsibilities

6.1 Board of Management

Ark's Board of Management is responsible for consideration and approval of this policy, and for ensuring that its decisions are taken in accordance with relevant legislation, regulatory expectations, training and guidance.

6.2 Executive Team

Ark's Executive Team is responsible for ensuring that this policy is reviewed in accordance with Ark's schedule for review of policies, or sooner if required. The Executive Team is responsible for ensuring that its decisions, and that the decision of officers, are taken in accordance with relevant legislation, regulatory expectations, training and guidance.

6.3 Leadership Team

Ark's Leadership Team is responsible for review of the policy, and for ensuring that its decisions, and that the decision of officers, are taken in accordance with relevant legislation, regulatory expectations, training and guidance.

6.4 Managers

Ark Care & Support Managers, Operations Managers and Regional Managers will be responsible for the effective implementation of this policy within their area of responsibility. They must also ensure that all Care & Support staff are made aware of this policy and participate in relevant training.

6.5 All Staff

All Ark Care & Support staff are required to familiarise themselves with this policy and comply with its provisions as well as undertake any training required as part of this policy or associated procedures.

6.6 Third Parties

All agency staff, volunteers and students undertaking Care & Support duties are required to familiarise themselves with this policy and comply with its provisions.

Ark will ensure that the Public Sector Equality Duty is complied with when third parties, such as contractors, are carrying out functions on behalf of Ark.

7.0 Support with Finances

Good Life Support Plan / R&V (Risk & Vulnerability) documentation will include an assessment of the individual's finances and ability to manage these. These will be reviewed at least every 6 months, or as and when required, to ensure that the individual is in receipt of the correct level and type of support to effectively manage their finances.

Support with finances will be of the least restrictive method required to ensure the individual's rights to privacy and self-determination are respected, while keeping them safe from harm or abuse.

Ark may act as a corporate appointee to manage Department of Work and Pensions (DWP) and Social Security Scotland benefits on an individual's behalf. Ark may then also open an 'In Trust' account with a local bank for the payment and management of those benefits. See: **CS05b Trust accounts and 'access-to-funds'**

Ark will work in partnership with any relevant person/organisation required to support an individual to manage their finances, for example a financial guardian or continuing power of attorney.

Ark will ensure safe custody of any financial items or money we hold on behalf of a supported person and ensure that holding these items do not amount to unnecessary restraint.

Ark will maintain accurate records and undertake robust auditing of any finances managed on behalf of a supported person.

8.0 Learning and Development Requirements

All Care & Support staff must complete the Learn Pro E-learning policy and procedure sign off for CS05 and CS05a – Supporting people with Money.

9.0 Related Policies & Procedures

This policy is aligned with two sets of procedures, **CS05a Support with Money** and **CS05b Trust accounts and 'Access-to-funds'**

This policy and associated procedures should be read and understood in conjunction with:

- CS02 Care Planning;
- CS06 Reducing Restrictive Practice;
- CS23a Quality Assurance – Care & Support;

- G13 Openness & Confidentiality;
- G24 Privacy & Data Protection;
- G34 Equality;
- G36 Keeping People Safe;
- G57a Adult Support & Protection;
- HR15 Whistleblowing.

10.0 Equality Impact Assessment (EIA)

Please see relevant Equality Impact Assessment.

11.0 Data Protection Impact Assessment (DPIA)

Please see AIMS Data Protection Impact Assessment.

12.0 Stakeholder Consultation

- Ark Board of Management
- Ark Leadership Team
- Ark Regional Managers
- Ark Operations Managers
- Ark Care & Support Managers
- Ark Finance Department
- Ark Housing Department
- Ark Policy and Procedure Review Group

13.0 Monitoring and Review

13.1 Monitoring

Ark's Executive and Leadership Teams will monitor implementation of this policy on an ongoing basis and ensure that relevant decisions within Ark are taken in line with the obligations and expectations set out in this policy.

This policy and its associated procedure will be monitored through Health and Safety quarterly incident reports and quality assurance processes.

13.2 Review

This policy will be reviewed within 3 years from the date of approval by our Board of Management, in accordance with Ark's policy review framework.