Appendix 2b

Central Bedfordshire Council
www.centralbedfordshire.gov.uk

Financial Guidelines 2025

Linsell House - Respite

Supporting People with Finances and Valuables

Care & Support Service - Adult Social Care

Introduction

1.1 This guidance provides a person-centred framework that places the individual at the centre of all procedures relating to their personal finances and valuables while staying at Respite.

1.2 This document reflects Central Bedfordshire Council's Financial Policies and Procedures.

1.3 Wherever possible, people accessing services should be encouraged to take responsibility for their own funds and valuables.

1.4 All people accessing Respite will have a thorough Risk Assessment outlining the level of support they require. Where it is in the person's best interest for staff to manage their finances, staff must follow the guidelines in this document.

1.5 Any financial irregularities must be reported immediately to the Registered Manager and the Safeguarding Team.

1.6 People arrive with an inventory completed by themselves, their family, or carers. Staff check this inventory while supporting the person to unpack at the start of their stay, and again when repacking for departure, ensuring all possessions leave with the individual. Valuables must be recorded in the Valuables Book on arrival, daily during their stay, and at departure. All entries must be countersigned by another staff member or the person's representative.

1.7 Within the context of this document, valuables can include CDs, jewellery, vehicle keys, or items of sentimental value. If there are concerns about a person's ability to manage their own finances, a capacity assessment must be completed regarding their ability to do so.

Supporting People

Transition

2.1 A Risk Assessment will be completed for all people accessing Respite. This will outline how individual personal finances will be managed while accessing the service. People can request to manage their own finances, manage a percentage of their money and request that Linsell House holds the balance. Linsell House will support with the safe storage of valuables including monies for all people who lack capacity.

2.2 The Service will make available a lockable drawer in the person's room for their sole use in securing valuables including monies. Alternatively, people who request or lack capacity can have their valuables stored within the main safe or securely locked in the main office.

Arrival

2.3 On arrival to Respite, staff will confirm with the person or their representative the amount of money that they have. For typical stays a maximum of £20 can be held, for extended stays an increased amount would be agreed on an individual basis between the service and their financial representative. The staff and person (when possible) will sign the person's individual finance sheet.

The money will be stored in the persons individual money wallet and locked in a safe. The amount in the wallet will also be recorded and signed by two staff in the “money held in safe” book.

2.4 When individual’s bring bank card’s, expenditure is agreed in advance with their representatives.

2.5 It is the responsibility of the Shift Leader to carry the keys to the money safe and tin on them at all times and ensure the safe handover of the keys and correct monies to the next Shift Leader (Shift Leaders are clearly identified on the shift planner). After every shift, the monies held must be counted and verified by two staff.

2.6 Any financial transactions that take place must be clearly recorded on the person’s financial sheet located in the respite unit; this must be completed and verified by two staff. The Shift Leader and countersigning staff member must also adjust the amount held in the “monies held in safe” book to ensure a complete audit trail.

2.7 Staff supporting people in the community with cash or card transactions must provide a receipt for any goods purchased. Where this is not possible staff must sign a R1 receipt.

Discharge

2.8 When people are departing Linsell House, all money must be checked by two members of staff, where possible in front of the escort, driver or whoever is collecting their belongings. The remaining money being returned must be recorded on the original documentation (individual’s financial sheet) by both staff.

2.9 All monies held by Linsell House for respite services may only be held for the duration of the person’s stay. They must then be passed over to the person when they leave. Monies cannot be held for people on a long-term basis.

The Senior Care Coordinator or Registered Manager will carry out a monthly audit of all finances held within the Service.

2.10 All Linsell House staff should read this document and sign to confirm they understand its contents.

Reviewed:
Senior Finance Business Partner October 2025
C&S Operational Manager October 2025
ASC Policy Advisor November 2025