

Title of meeting: Cabinet

Date of meeting: 10 March 2020

Subject: Administration Fees For Appointeeship Services

Report from: Chris Ward, Director of Finance

Report by: Richard Webb, Finance Manager - Adult Social Care & Public Health
Kelly Redman, Team Manager - Financial Assessments, Income and Recovery

Wards affected: All Wards

Key decision: No

Full Council decision: No

1. Purpose of report

- 1.1 The purpose of this report is to seek approval to introduce administration fees from Monday 06 July 2020 for clients in receipt of Appointeeship services provided by the City Council.
- 1.2 The rationale for proposed introduction of these fees, is to ensure that the service will be available to support future vulnerable adults requiring our services. Without introducing the proposed charges, there is a risk that the service would not be able to continue to support the growing number of clients.
- 1.3 The recommendations have therefore been driven by the following key principles:
 - To support the Adult Social Care strategy to enable people to live independently and remain within their communities.
 - To ensure that the appointeeship service can continue to support the growing number of clients, and more clients with increasingly complex financial requirements; as a consequence of more people being supported to live in their communities.
 - To recognise that appointeeship clients will be in receipt of state benefits and little other income, therefore seek to keep fees as low as possible.
 - To ensure that additional income generated by these proposals will enable the service to continue to support those vulnerable clients who require the support of Portsmouth City Council to help manage their finances.

2. Recommendations

2.1 It is recommended that the Cabinet:

- a. Agrees to introduce administration fees for Appointeeship services from Monday 06 July 2020.
- b. Agrees to set the weekly fees at the following rates for the financial year 2020-21 from the above date:

For clients in residential care	£4.00
For clients in community based care	£10.00

- c. Agrees to the mitigation arrangements in the case of hardship as set out in paragraphs 5.20 and 5.21.
- d. Agree that the proposed fee rates above, will be inflated annually in line with the inflation rate applied to the Adult Social Care fees and charges from the financial year 2021-22.
- e. Notes the proposed community support and engagement process as detailed in section 7 of this report.

3. Background

- 3.1 The Secretary of State may appoint another person to receive and deal with social security benefits payable to someone who is "unable to act" for themselves. Appointeeship applications are subject to approval by the Secretary of State through the Department for Work and Pensions (DWP). An appointee is authorised to act under the Social Security (claims and payments) Regulations 1987.¹
- 3.2 There is no specific statutory duty placed on the Local Authority to provide appointeeship services. Portsmouth City Council recognises that in some cases vulnerable adults may be "unable act" by reason of 'impairment of the brain or mind' and/or physical impairment and therefore it would be unreasonable not to support those who have no other means act to support themselves.
- 3.3 Appointeeship only gives the Local Authority permission to receive DWP benefits and pensions. It does not extend to the management of private income or assets such as savings or property. Where clients have significant assets and the client is deemed as lacking mental capacity to make financial decisions, a court order is required from the Court of Protection to appoint a nominated person to act as a Deputy on behalf of the client. Currently Portsmouth manages c.80 clients under this power

¹ An appointment to act is made under regulation 33 of the Claims and Payments Regulations 1987 or, for UC, PIP and new-style JSA and ESA, regulation 57 of The UC, PIP, JSA and ESA Claims and Payments Regulations 2013

and is able to charge for the provision of these services in accordance with rates set by the Court of Protection².

- 3.4 In summary, the City Council may provide financial support, either through appointeeship or deputyship to vulnerable adults, depending on the level and type of their financial income and assets.
- 3.5 Independent living and supporting people to remain within their communities is high on Adult Social Care's agenda. However, the volume of work supporting clients living in the community is far higher than for those in residential care; and therefore this requires more staff resource to ensure the client's best financial interests are upheld.
- 3.6 The number of clients supported by the appointeeship team has grown from c.90 to c.260 since 2011. These are Social Care clients who either lack capacity to manage their finances, have severe physical disabilities resulting in the inability to access funds or for whom there are safeguarding concerns surrounding finance.
- 3.7 In order to ensure that the appointeeship team can continue to support the growing number of clients, with complex financial requirements, (as a consequence of more people increasingly being supported to live in their communities) it has been necessary to review the operating model for the service, to ensure that it can respond to future demand requirements.

4. Acting as an appointee

- 4.1 Sometimes people need Portsmouth City Council to help manage their money; particularly where they are unable to nominate friends or family members to support them. On some occasions, it is necessary for the City Council to step in where an individual is being, or is at risk of financial abuse.
- 4.2 Before the City Council can assume responsibility for an individual's financial affairs, it must consider the support that can be provided by friends and family members, etc. where appropriate. Only where support is unavailable from other sources, will the City Council consider seeking appointeeship or deputyship responsibilities.

² <https://www.judiciary.uk/wp-content/uploads/2017/04/pd-19b-fixed-costs.pdf>

- 4.3 To be eligible for support from the appointeeship team, the person needs to be deemed as "unable to act".

Portsmouth defines "unable to act":

- as an adult who lacks capacity to manage finances (a recent Mental Capacity Assessment (MCA) is required to demonstrate professional judgement)
OR
- has severe physical disabilities resulting in the inability to deal with finances;
and/or
- who has been subject to financial abuse/safeguarding concern(s);
and
- there must be no one else who is willing or suitable to manage the individual's finances.

- 4.4 In supporting these clients, the appointeeship officers undertake a range of functions, including:

- Collecting state benefits
- Maximising benefit income
- Making payments from these monies for care charges, personal allowances, and other bills; particularly where the individual continues to live in the community
- Supporting individuals to save

- 4.5 As highlighted above, the Adult Social Care strategy seeks to support more people to live within their communities. As a consequence of this strategy, the appointeeship team are supporting more people; and more people with increasingly complex financial requirements. The sections below seek to outline the proposed strategy for ensuring that the service can continue to respond to future demand requirements.

5. Proposal

Operating model

- 5.1 As highlighted above, the appointeeship service is currently supporting c.260 clients. Within this client cohort there are approximately 72 clients who are or will be in the process of transferring across to the Deputyship service, once the necessary approvals from the Court of Protection have been obtained. There are also further appointeeship applications currently in progress.
- 5.2 It is expected that there will continue to be a steady growth in the number of appointeeship clients and that the average client cohort in the medium term is estimated to be c.240 clients.

- 5.3 Currently the administration and reconciliations for the appointeeship services are completed manually and are highly labour intensive. Through automating these processes, efficiencies are expected, allowing staff the capacity to respond to client need(s) and accept new referrals.
- 5.4 The service is therefore exploring opportunities to implement an electronic case management system, which would assist in recording documentation, managing and monitoring client finances.
- 5.5 Based on professional experience, the average case holding of an appointeeship officer is expected to be c.60 clients, post implementation of the new system. Therefore, four appointeeship officers would be required to support the anticipated average number of clients. In addition, there is also a requirement for administrative assistants to support these officers. Based on these estimated staffing requirements, the average cost of resourcing the service is c.£221,500 per annum, including corporate overheads and future system hosting & licencing costs.

Ability to charge

- 5.6 Whilst guidance³ states that an appointee may not take a fee or payment for acting as an appointee, the government has issued further guidance, which clarifies that corporate appointees may charge a fee.⁴
- 5.7 Guidance issued in September 2011⁵ confirmed that Local Authorities fall within the definition of Corporate Bodies in respect of organisations that are permitted to charge for appointeeship services. There is no specific guidance in respect of how the fees should be calculated. However there is an overriding principle of charging in a proportionate, reasonable manner and on a cost basis.

Charging arrangements

- 5.8 In order to continue to invest and deliver a high quality service for our appointeeship clients, it is no longer possible to continue to provide the service free of charge. However, it is recognised that appointeeship clients will be in receipt of state benefits and little other income, therefore the Council will seek to keep these fees as low as possible.
- 5.9 Those in residential care generally receive only one monthly invoice and require access to a weekly personal allowance (set at £24.90 by the Department of Health), which in the vast majority of cases the residential provider arranges and supports with any purchases/services that are

³ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/226782/Appendix-05_Aide_Memoire_-_Appointee_use.pdf

⁴ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/554313/appointee-summary.pdf

⁵ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/226812/2011-September_amendment_package.pdf

required. However, as highlighted above, independent living remains high on Adult Social Care's agenda and as such there is greater financial risk for vulnerable clients. The volume of work supporting clients living in the community is far higher than for those in residential care; and therefore this requires more staff resource to ensure the client's best financial interests are upheld.

- 5.10 The difference in the resource requirements for clients living in community arises from these clients having a greater range of financial commitments such as, utility bills, mobile phones, internal and external debts. Client's in the community are also exposed to greater risk ranging from doorstep lenders, loss of money and property and require more by way of purchases.
- 5.11 Based on the above operating model and the average estimated client numbers, the total cost per client would be £923 per annum (or a weekly cost of £17.70). As there a clear differences in the level of staffing resource required (approximately a ratio of 5:1) to support clients living in the community as opposed to a residential care setting, it is necessary to consider the costs of these provisions separately. After adjusting the calculations to reflect the resource demands, the cost per week would be £21.07 for community based clients, and £4.21 per week for residential clients.
- 5.12 In order to fully recover the costs of providing this service, it would be necessary to charge the above rates. However, as noted above, it is recognised that the clients are on state benefits and are likely to have little other income, therefore the City Council is not intending to seek full cost recovery.

Benchmarking

- 5.13 As part of our considerations, we have contacted other Local Authorities within the 'National Association of Financial Assessment Officers' (NAFAO) (in excess of 100 authorities) as well as reviewing authority websites for information on the level of fees charged. Appendix 1 shows the findings from this review, as well as details of the fees charged by the authorities.
- 5.14 Of the 76 Authorities we obtained information for, 34 (45%) of authorities already charged for these services, whilst 10 (24%) of authorities' who do not currently charge, reported that they were considering it.
- 5.15 With regard to the City Council's neighbouring authorities, (HCC, IOW, SCC and WSCC) currently they do not charge for these services.
- 5.16 There are other organisations that can provide corporate appointeeship services for clients. The table below provides details of three organisations that have been identified from a web search of potential

providers and shows the range of service offerings and related charges; although the rates for charged for 2020-21 may differ. Where charges have been provided as annual or monthly rates, these have been converted into weekly costs for comparative purposes.

Organisation	Pricing Details
Penderels Trust ⁶	<p>Service levels for clients in community:</p> <ul style="list-style-type: none"> ▪ Basic £800p.a (£15.34 p.w.) ▪ Standard £1,000p.a. (£19.18 p.w.) ▪ Enhanced £1,300p.a (£24.93 p.w.) <p>Service levels for clients in Residential / Care Home:</p> <ul style="list-style-type: none"> ▪ Basic £400p.a (£7.67 p.w.) ▪ Enhanced £700p.a (£13.43 p.w.) <p>Additional charges may also be applicable (e.g. additional hours of support, funeral planning & arrangements, etc.)</p> <p><i>Note the above prices were based on their 2018 brochure.</i></p>
Money Carer ⁷	<p>Fixed monthly fees:</p> <p>£65 for clients in the community (£14.96 p.w.)</p> <p>£35 per month for Residential / Care Home (£8.06 p.w.)</p> <p>Additional charges may also be applicable: e.g. one time set-up fee, annual bank account charge of £35 and prepaid card charges.</p>
Dosh Financial Advocacy ⁸	<p>Person-centred appointeeship £16.00 per week + £64 set-up fee.</p> <p><i>Note: rates as at April 2019.</i></p>

Proposed fees

5.17 As highlighted above, the appointeeship service has seen a growing number of clients, and more clients with increasingly complex financial requirements, (as a consequence of more people increasingly being supported to live in their communities). The proposal to introduce an

⁶ https://crm.penderelstrust.org.uk/officeFiles/Guide_to_Appointeeships_2018.pdf

⁷ <http://www.moneycarer.org.uk/services/appointeeship>

⁸ <https://www.dosh.org/get-support-with-money/appointeeship-and-financial-advocacy/>

administration fee which will contribute to the operating costs of this service, is intended to ensure that the service is able to continue to support those clients who require the support of Portsmouth City Council to help manage their finances.

- 5.18 Having considered the actual costs of providing the service, as well as the above findings from the comparison of the charges applied by other local authorities, it is proposed that the City Council will implement the fees shown below, as a contribution towards the administrative costs of providing these services.

	Weekly Fee
For clients in residential care	£4.00
For clients in community based care	£10.00

- 5.19 The higher weekly fee level for clients in community based care, reflects the greater level of staff resource required to support these clients, as highlighted earlier within the report. The ratio between the fee rates also reflects the higher level of personal allowances that clients in the community will retain compared to those in residential care.
- 5.20 It is recognised that there may be instances where a client's level of financial resources may mean that they are unable to pay these fees. Therefore it is proposed that in cases of financial hardship the weekly fees may be reduced or not charged. Hardship cases will be considered on a case by case basis by the Team Manager for the appointeeship services.
- 5.21 Examples as to when hardship cases may apply, include: suspension of DWP benefits (not as a result of exceeding capital thresholds) or where there has been a change in circumstances, such as a community based client, temporarily being placed in residential care, and as a result incurring increased care costs.
- 5.22 Should an individual's financial circumstances change, then the application or not of the fees will be reconsidered and approved by the Team Manager for appointeeship services.
- 5.23 Appendix 1 shows that other Local Authorities have used capital thresholds as a basis to taper charging. However, so as not to create a financial disincentive to save, disposable income has used as the method for charging, promoting independence and ensuring that should clients require additional purchases or funds for social activities this will be readily available to them.

6. Financial Impact

- 6.1 In order to better understand the financial impact of these proposals, the clients have been grouped and analysed according to the Department for Work and Pensions (DWP) age ranges, reflecting the basis used by the DWP for the application means tested benefits.
- 6.2 The table below shows the client group's average weekly income (Benefits) and their net weekly disposable income after all financial commitments, excluding food have been met. This amount is also after allowing for a proportionate savings contribution by the individual, in case of an emergency or additional unforeseen financial pressure.

Age Group	No. of Clients	Average Disposable Income £	Average Weekly Benefit Income £
Under 25	14	127.45	193.30
25-65	122	139.78	236.69
Over 65	51	114.10	236.02
	187	131.86	

- 6.3 The table above excludes those clients that are currently under the appointeeship service and are due to transfer to the Deputyship service, as a consequence of having private income or significant savings over £16,000; which is the upper capital threshold for means tested DWP benefit payments.
- 6.4 Further analysis has shown that 65% of the above clients have disposable income (as defined above) of £100 or more per week. Of this cohort 36 (19%) clients have disposable income in excess of £200 per week.
- 6.5 Proposed mitigation arrangements for all clients include a full financial review at the time of charging implementation, this is to ensure that all benefits are in payment, at the correct rates and any change of circumstances are recognised. Outgoings will be reviewed and where possible reduced, including energy efficiency advice to ensure clients are getting best value.
- 6.6 The above review has shown that the clients generally have adequate disposable income in order to meet these proposed charges without having a significant adverse effect on their financial position or wellbeing. However, as highlighted above all clients will have a financial review and hardship will be considered in line with the proposed arrangements set out within in section 5 of this report. Specific focus will be given to those with lower levels of disposable income.

7. Community Engagement

- 7.1 If the recommendations are accepted there will be a requirement to engage and communicate with the client group. It is recognised that this will be more challenging, as by the nature of the client base a high proportion of appointeeship clients do not have mental capacity to deal with finances.
- 7.2 It is therefore proposed, where appropriate to do so, to fully engage with any known family, friends, support workers, advocacy services, care agencies and Adult Social Care.
- 7.3 Easy to read briefing sheets will be devised and issued to all clients inviting them and their chosen support to attend drop in sessions/coffee mornings held both in the North and South of the City. An explanation of charging will be given.
- 7.4 For those clients with physical disabilities they will be visited with appropriate support/advocacy in order to explain charging.
- 7.5 It is also proposed that presentations are made to other professional services known to be involved with this client group for example supported living providers, care agencies and Adult Social Care. This is to ensure that communication is consistent across services and clients have access to information at any point of entry.
- 7.6 This engagement process will also include a financial review and where possible the team will look to maximise benefits and reduce outgoings. Financial hardship will be considered throughout this process as outlined within sections 5 and 6 of the report.

8. Reasons for recommendations

- 8.1 The number of clients supported by the appointeeship team has grown from c.90 to c.260 since 2011. These are Social Care clients who either lack capacity to manage their finances, have severe physical disabilities resulting in the inability to access funds or where there are safeguarding concerns surrounding finance.
- 8.2 Independent living remains high on Adult Social Care's agenda and as such there is greater financial risk for vulnerable clients. The volume of work supporting clients living in the community is far higher than for those in residential care; and therefore this requires more staff resource to ensure the client's best financial interests are upheld
- 8.3 In order to ensure that the team can continue to support the growing number of clients, with complex financial requirements, (as a consequence of more people being supported to live in their communities) it has been

necessary to review the operating model for this service, to ensure the service can respond to future demand requirements.

- 8.4 The proposal to introduce an administration fee which will contribute to the operating costs of this service, is intended to ensure that the service is able to continue to support those clients who require the support of Portsmouth City Council to help manage their finances.

9. Integrated impact assessment

9.1 The recommended fees have been driven by the following key principles:

- To support the Adult Social Care strategy to enable people to live independently and remain within their communities.
- To ensure that the appointeeship service can continue to support the growing number of clients, and more clients with increasingly complex financial requirements; as a consequence of more people being supported to live in their communities.
- To recognise that appointeeship clients will be in receipt of state benefits and little other income, therefore seek to keep fees as low as possible.
- To ensure that additional income generated by these proposals will enable the service to continue to support those vulnerable clients who require the support of Portsmouth City Council to help manage their finances.

9.2 A preliminary Integrated Impact Assessment (IIA) has been carried out (Appendix 2). From this it was determined that a full IIA would normally be required.

9.3 However due to the specific criteria which applies to Appointeeship eligibility, all clients would be considered vulnerable and/or to have a disability and therefore have protected characteristics. By the nature of the service, a high percentage of clients do not have mental capacity surrounding finances and therefore this presents challenges for engagement processes.

9.4 Advice given by the Access & Equality Advisor was that due to the specific client group, capacity issues and as the proposed change is equitable across all clients under Appointeeship, a full IIA would not be appropriate and any mitigation should be the main focus surrounding any decision making as outlined in section 7 of the report.

9.5 Additionally, any representations from the engagement process will be captured using available reporting; this is to ensure that any clients that withdraw from support, Adult Social Care will be notified so as appropriate action can be taken to insure the clients best interests are protected.

10. Legal comments

10.1 PCC is permitted to charge appointeeship fees if they are proportionate, reasonable and on a cost basis. The legal basis for charging is outlined in the body of the report. Any decision is likely to be controversial and as such must be readily consulted upon in order to mitigate as against challenge.

11. Finance comments

11.1 As highlighted within the report, the appointeeship service has seen a growing number of clients, and more clients with increasingly complex financial requirements, (as a consequence of more people increasingly being supported to live in their communities).

11.2 The proposal to introduce an administration fee which will contribute to the operating costs of this service, is intended to ensure that the service is able to continue to support those clients who require the support of Portsmouth City Council to help manage their finances. The rationale for the proposed fee levels is set out in section 5 of the report.

11.3 Based on the initial financial modelling, the proposed fees are expected to generate c.£65,000 of income in 2020-21 (part year), which will contribute towards the £221,500 cost of operating the service.

11.4 These charges will not be subject to VAT.

11.5 In accordance with the financial rules, this new charge has been agreed with both the s.151 officer and City Solicitor as being intra vires.

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Signed by:

Appendices:

Appendix 1 - Benchmarking table - other Local Authorities
Appendix 2 - Preliminary Equality Impact Assessment

Background list of documents: Section 100D of the Local Government Act 1972

The following documents disclose facts or matters, which have been relied upon to a material extent by the author in preparing this report:

Title of document	Location
The Care Act	www.legislation.gov.uk
Social Security (claims and payments) Regulations 1987	www.legislation.gov.uk
DWP Appointeeship guidance	www.gov.uk

The recommendation(s) set out above were approved/ approved as amended/ deferred/ rejected by on

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Signed by:



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
Barking and Dagenham	Yes	£8 per week	£8 per week		
Barnet	No				Considering charging arrangements
Bexley	No				
Bristol	Yes	£5.00 per week	£5.00 per week		
Bromley Council	Yes	£745 one off fee + annual fee. Annual fee is £775 (1st year) and £650 subsequent years for savings > 16k or 3.5% if under 16k	£745 one off fee + annual fee. Annual fee is £775 (1st year) and £650 subsequent years for savings > 16k or 3.5% if under 16k		£300 property management fee which includes paying of bills for those with £16,000+ and 3.5% for those under £16,000 up to £300
Buckinghamshire County Council	Yes	£2.50 per week	£2.50 per week		
Bury	Yes	£10.24 per week	£5.12 per week	Community – waived if less than £1000 capital/savings. Residential – waived if less than £2000 capital/savings	
Camden	No				
Central Bedfordshire	Yes	£60 per year + 3.5% of customers capital max fee £495	£26 per year+ 3.5% of customers capital max fee £495	Capital over £1000	Capital < £1000 no charge
Cheshire East	No				No charge – only take on appointee at the very last resort when there is no other option available.



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
Cheshire West	No				
City Of London	No				
City Of Stoke On Trent	No				Considering charging arrangements and are currently in the consultation process
City Of Westminster	No				
City of York	Yes	£5.50 per week	£5.50 per week	If balance is less than £5.50, then 3.5% of balance	
Croydon Council	Yes	Capital >16k =£700 year 1 and £585 per year after Capital <16K fee is 2.5% of savings for health and welfare and 3% for property and affairs max £500	Capital >16k =£700 year 1 and £585 per year after Capital <16K fee is 2.5% of savings for health and welfare and 3% for property and affairs max £501		
Derbyshire	No				No charge currently but under consideration at a charge of £10 per week depending on factors such as capital.
Devon County Council	No				
Dudley Council	No				Dudley no longer offers an appointeeship service, only full deputyship where client lacks capacity
Ealing Council	No				



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
East Sussex	No				Considering charging arrangements
Gateshead	Yes			Use a sliding scale of charges up to an annual maximum based on income and savings levels.	
Hackney	No				Considering charging arrangements
Halton	Yes	£10 per week	£7.00 per week	In community if no savings at date of Appointeeship exemption for 3 months to allow time to accrue money. No charge in Residential if capital less than £1000	
Hammersmith and Fulham	No				
Haringey	No				Considering introducing charges for appointeeship similar to deputyship charges
Harrow	Yes			Charge for appointeeships using the same annual charges as deputy clients. Clients net assets < 16K charge 3.5% and for those with > 16k £650	Charge for appointeeships using the same annual charges as deputy clients. Clients net assets < 16K charge 3.5% and for those with > 16k £650
Hartlepool	No				
Hillingdon	No				



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
Hounslow	Yes	£291 per annum <6K or £582 > 6K	£291 per annum <6K or £582 > 6K		
Kensington and Chelsea	No				
Kent County Council	No				
Kirklees Council	Yes	£10.00 per week	£5.00 per week	If savings in excess of £1000	
Knowsley	Yes	£20 per month	£20 per month	Only where clients have a balance of funds in excess of £1000.	
Lambeth	No				
Leeds	No				Considering introducing charges for appointeeship
Leicestershire County Council	No				
Lewisham	No				
Lincolnshire	No				Considering introducing charges for appointeeship
Liverpool	No				
London Borough of Bromley	Yes				3.5% <16k. For those over 16k there is an annual fee starting with £745 in the first year and £650 for every year after
Manchester	No				
Medway	Yes	Assets £0-£499.00 nil, below £3000.00 £50.00 per year, £3000.00-	Assets £0-£499.00 nil, below £3000.00 £50.00 per year,	£500.00 or above in capital on birthday following referral	



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
		£9999.00 £5.00 per week, £10000.00 - £15999.00 3.5% of capital, £16000.00 plus £650.00 per year	£3000.00- £9999.00 £5.00 per week, £10000.00 - £15999.00 3.5% of capital, £16000.00 plus £650.00 per year		
Merton	No				Not currently but would look to charge on a sliding scale based on assets
Newham	No				
North East Lincs	yes	£296.00 per year	£296.00 per year	All clients are charged and then we operate an appeals panel/write off procedure for those who can't afford to pay	This is a new process from July 2019
North Yorkshire	No				Considering introducing charges for appointeeship
Northamptonshire County Council	Yes	£12.50 per week	£10 per week	Savings over £1000	
Northumberland	No				
Nottingham	No				
Nottinghamshire	Yes	£12.00 per week	£12.00 per week	If savings in excess of £1000	
Oldham Council	Yes	£10.00 per week + one off £309.00 admin fee	£5.00 per week + one off £309.00 admin fee		
Poole Council	Yes	Capital £2001-£4999 £10 per week £5000-£9999 £11 per week £10,000 + £12 per	Capital £2001-£4999 £10 per week £5000-£9999 £11 per week £10,000 + £12 per	Savings over £2000	



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
		<i>week</i>	<i>week</i>		
Reading Borough Council	Yes	Category I: Currently charge £25 for the work up to appointeeship is granted from DWP Category II: Sliding Scale charged per week £750-£1999 = £1.00 £2000-£3999 = £2.00 £4000-£5999 = £3.00 £6000-£9999 = £4.00 Over £10000 = £5.00	Category I: Currently charge £25 for the work up to appointeeship is granted from DWP Category II: Sliding Scale charged per week £750-£1999 = £1.00 £2000-£3999 = £2.00 £4000-£5999 = £3.00 £6000-£9999 = £4.00 Over £10000 = £5.00	If savings in excess of £749.00	One off charges also exist for arranging holidays, property searches, shopping and ordering products and any research these are £10-£25
Rochdale Borough Council	Yes	£576 (plus VAT) Per Annum	£300 (Plus VAT) per annum		Clients over 16K cannot apply for appointee service.
Royal Borough of Greenwich	No				Apply to be appointed as Deputy in most cases
Royal Borough of Kingston Upon Thames	No				
Sefton	Yes	N/A	5	If savings in excess of £1000	Only take appointeeship on for clients in care homes.
Sheffield	No				
Southend	No				
Staffordshire Council	Yes	£7.50 per week	£5.00 per week	If savings exceed £1000	
St Helens	Yes	£5.00 per week	£3.00 per week	No charge if savings below £1000	



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
Stockport	Yes	£10.30 per week	£5.15 per week	For service users with less than £1k the charge is £1.00 per month	
Somerset Council	Yes	£501.00- £3000 £50 pa £3000-£10000 £260pa £10000-£15999 3.5% £16000 £650.00pa	£501.00- £3000 £50 pa £3000- £10000 £260pa £10000-£15999 3.5% £16000 £650.00pa	£500+ savings	
Sunderland	Yes	£5.00 per week	£5.00 per week		
Tameside Council	Yes	90.02 per quarter	90.02 per quarter	If savings in excess of £1000	
Tower Hamlets	No	-			
Waltham Forest	No	-			No longer offer appointeeship services but they used to and they charged 3.5%<16K and £650 if over as well as a £300 property management fee if SU was in a home.
Wandsworth and Richmond	No	-			
Warrington	Yes	£10 per week	£7.00 per week		
West Berkshire	No				
West Lothian	No	-			
Wigan	Yes	£15 per week	£15 per week	Only exempt if benefits are suspended.	
Wirral	No	-			



Appendix 1

Name of Local Authority	Charging for Appointeeship Services	Charge - clients in community	Charge - Clients in residential care	Criteria for charging for Appointeeship Services	Comments
Wrexham Council	Yes	£10 per week	£10 per week		
Wokingham	Yes	£100 per annum	£100 per annum	Savings below £3000 only. COP charges for anyone over £3000	

