

Social Security Experience Panels: Appointees

Background

The Scottish Government is becoming responsible for some of the benefits currently delivered by the Department for Work and Pensions (DWP). As part of work to prepare for this change, the Scottish Government set up the Social Security Experience Panels.

**Department
for Work and
Pensions**



**Scottish
Government**



Over 2,400 people from across Scotland joined the Experience Panels when they started in 2017. They all have recent experience of the benefits that are coming to Scotland.



The Scottish Government is working with Experience Panel members to create Scotland's new social security system.

2,400+
**Experience Panel
members**

About the research

This report gives the findings of people's experience of the appointees system. An appointee is a person or organisation given the power to act on another person's behalf by a social security agency.



1969

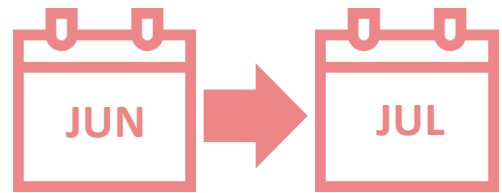
Invites



259

Survey responses

The research took place in

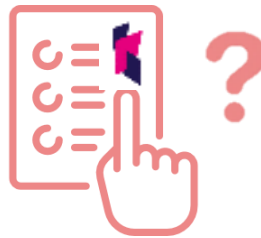


2020

The research explored:



The experience of the appointee process in the existing benefits system



Views on how the appointee process should work under Social Security Scotland



When people may choose to have an appointee act on their behalf

Participants were aged between

16 – 79

years old



32%

Man or boy



66%

Woman or girl



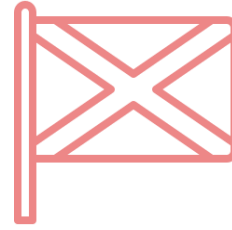
78%

lived in an urban location



22%

lived in a rural location



Respondents took part from **30** local authority areas

Most survey respondents had a disability or long term health condition (87 per cent), including:



chronic pain



severe hearing impairments



severe visual impairments



other kinds of long term health condition

More than half (55 per cent) of survey respondents were:



a carer due to **old age**,



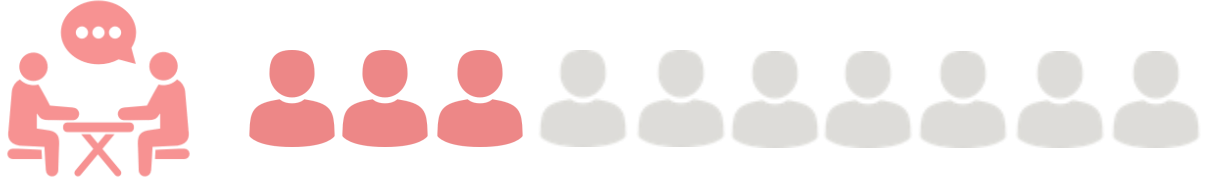
a carer to a **child**, or



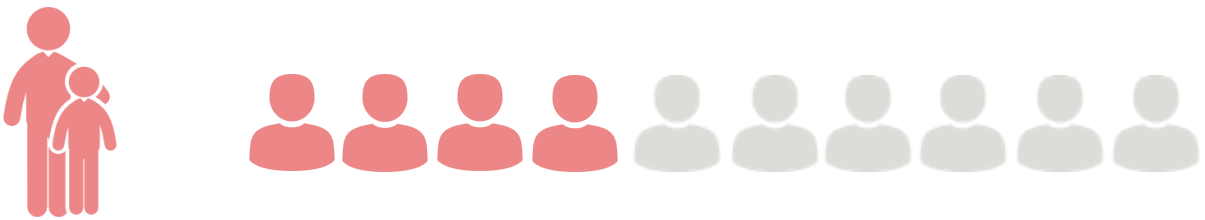
a carer to an **adult**.

Experience of the current appointee system

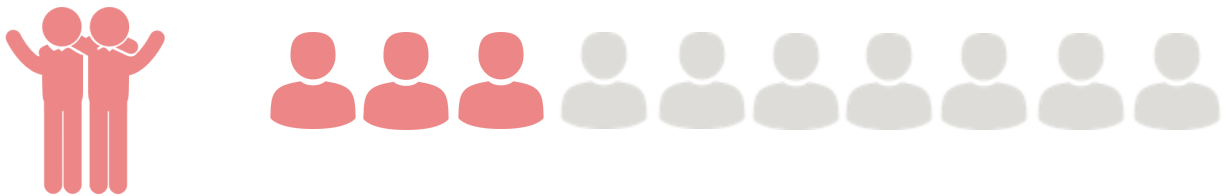
Three in ten (31 per cent) respondents had an experience of being an appointee.



Four in ten (41%) were an appointee for their child.



Three in ten (34%) were an appointee for another family member.



The remaining respondents were an appointee for a spouse or partner, a friend, a client (as a professional appointee) or someone else.

Respondents said they had acted as an appointee for someone due to health conditions including:



Learning disabilities or neurological conditions



Mental health conditions



Terminal illness or old age

Many respondents said that they had experience of a person or organisation acting on their behalf when accessing benefits.



Two in five (38%) had a third party acting on their behalf.

One in ten had an advocate acting on their behalf.



Other respondents had experience of an appointee or a Power of Attorney acting on their behalf when accessing benefits.



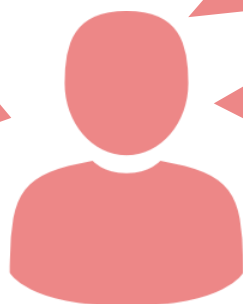
Overall, most respondents said that the person was able to help them with some or all of the things they needed support with.



But some respondents said that the person couldn't help with some things. This was either because they didn't have the resources to help, or they weren't allowed to speak for the client. This was particularly a problem at assessments and appeals.

"They were able to explain, support and guide me through the necessary benefits and paperwork/ forms when I was not in a position to do so myself."

"They were told they could not act or speak on my behalf."



"They were unable to speak up for me or interject and query decision making."

The need for appointees

Choosing to have an appointee



Half (51 per cent) of respondents said that they might choose to become an appointee for a client of Social Security Scotland.

Seven in ten (71 per cent) respondents said that they might choose to have an appointee act for them.

Circumstances when they might want an appointee included:



If their existing conditions progressed or they became ill.



If they were going through a difficult time such as a bereavement.



If they were struggling to cope with the benefits system.

“My own health has been deteriorating for the last decade and I can imagine that in another decade I may not be able to do what I am doing now. I would ask for help if help was needed. I think it is important that people feel they can ask for this and it not be either an embarrassment or an inconvenience.”

Responsibilities of an appointee

Respondents were asked what they would want an appointee to do for them.



Most (93%) respondents said that they would want an appointee to apply for a benefit for them.



Six in ten (66%) said that they would want the appointee to receive all communications from Social Security Scotland on their behalf.



Two in five (39 per cent) respondents said they would want the appointee to make decisions about their benefits.



One in five (20 per cent) said they would want them to receive the payment for them.

Some respondents were clear that they would still want to retain some control if they had an appointee, and would not want that person to “take over”.

“Consult with me about my benefits, then pursue a course of action that has the best possible outcome for me.”

Who should be the appointee

Respondents were asked who they would want to act as an appointee for them.



More than two in five (44 per cent) respondents said that they would want their partner or spouse to act as their appointee.



More than half (54 per cent) said “another close family member”.



The remaining respondents said that they would want a paid professional, a friend, or someone else to act as their appointee.

Setting up an appointeeship

Respondents were asked about the process for setting up an appointee arrangement.



Just over three in ten (31 per cent) said they would want a member of staff from Social Security Scotland to visit them at home.



Two in ten (26 per cent) said they would want the appointee to contact Social Security Scotland for them.



The remaining respondents said they would want to phone or write to Social Security Scotland, or visit an office, or another way.

Respondents were asked how Social Security Scotland should check if someone was suitable to be an appointee.



Just over seven in ten (71 per cent) said there should be background checks in place.



Almost six in ten (59 per cent) thought Social Security Scotland should visit them face to face.



Almost half (46 per cent) thought the appointee should have to provide a reference.



A quarter thought that Social Security Scotland should speak to them on the phone.



Many respondents felt that protecting the interests of the client should be the main priority.

Some felt that it should depend on the circumstances what checks were in place. Others felt it should be kept as simple as possible.

“As that individual will be taking on a role that is for the safety and health of that person and will deal with personal issues the person must be checked that they have not got a criminal record.”

“If it was a friend, I would expect there to be a face to face meeting (with me too).”



“If I was to ask someone to act as an appointee for myself I would be mortified if you then asked that person to prove something.”

Reviewing an appointeeship

When an appointeeship should be reviewed



Respondents were asked about **when** they thought appointee arrangements should be reviewed.



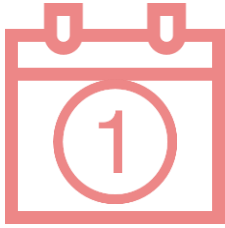
Three in five respondents (62 per cent) said when the client or appointee requests it.



More than half (56 per cent) said if someone else asks Social Security Scotland to do checks or raises a concern.



More than half (54 per cent) said when the client's benefits are changed or reviewed.



Others felt that there should be regular checks in place, for example every year (40 per cent), or every two years (20 per cent).

“No need to keep on checking up if people are happy with the arrangement.”



“Dealing with disabilities is tiring and stressful. It’s important to have checks in place but these need to be at a level which doesn’t become a burden.”

How an appointeeship should be reviewed



Respondents were asked about **how** they thought appointee arrangements should be reviewed.



Seven in ten (67 per cent) said there should be a face to face conversation.



More than half (52 per cent) said that a form should be submitted online or by email.



More than two in five said over the phone (43 per cent) or as a form submitted by post (43 per cent).



When asked what should be looked at, most respondents were in favour of a broad range of questions being considered, including:



client and appointee's wishes.



the appointee's management of the role.



any changes of circumstances.

Next Steps

This research will help inform the development of guidance for appointees.

It helps give an understanding of:



situations when clients think that having an appointee will be helpful



protections that should be put in place



when and how appointeeships should be reviewed

The findings in this report will inform the legal framework required. This will be done in the Social Security Administration and Tribunal Membership (Scotland) Bill.



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