

Fee and Discount Matrix

Annex A

In the interests of consistency prospective applicants are asked to conform to the following guidelines when completing their standing offers in Annex A.

Sections A and B

Completion of these sections is a mandatory element for evaluation.

Confirmation boxes should be marked with an X as follows:



Providers who operate **fixed daily rates only** should assume a 7-hour working day for the purposes of hourly charge calculations in accordance with this matrix.

Providers who decline to place bids against certain fee earner “categories” should insert n/a within the matrix to complete the grid.

Sections C -F

Providers who decline to place bids against sections C- F should insert n/a against the Section Header and leave all associated responses blank to confirm this position.

Confirmation boxes should be marked with an X as follows:



Matrix Assumptions

This fee matrix assumes that:

- a charity will not be charged for providers training & trainee experience. Fees applied to trainees will be raised only in the event of their work having a direct contribution to case outcomes
- all hourly fees are **exclusive** of VAT, direct expenses and disbursements
- fees **include** any charge apportioned for travelling time to the regional assignment
- the most economic method of travel will be applied consistently.
- the **absence** of administrative charges in the matrix **confirms** that fee earner charging absorbs these costs.
- the role/title of key individuals nominated under IM stage 1 is identified at A3.
- fees will apply for a minimum 12 month period and the basis/index applied to subsequent fee increase is clearly identified
- hourly fees (or equivalent) quoted in the matrix are the **maximum** fees that will apply for any case Order. Case proposals will recognise and may reflect downward fee adjustments based on the specific circumstance of the charity, and information available at the start of any appointment.

- **Section A** Fixed Hourly Fees A1 - London only

Service Category	Band	Senior Partner	Senior Associate /Executive /Consultant /Specialist /Expert /Junior Partner	Executive/ Associate/ Consultant/ Manager	Other	Assistant	Trainee	Admin support
Care of animals / Children / Vulnerable beneficiaries / Conduct of medical care /research	A							
Insolvency / dissolution / Fraud/Sham charities / Breaches of trust / Recovery of funds Financial mismanagement / Lack of internal controls/ Admin failure / conflict of interest / trustee disputes/ contract issues / poor governance	B							
Charitable trading issues / Management of Fundraising /control of associated costs	C							
Anti-terrorism	D							
Business Planning / Advisory work	D							

Fixed Hourly Fees A2 – Regional rates excluding London

Service Category	Band	Senior Partner	Senior Associate /Executive /Consultant /Specialist /Expert /Junior Partner	Executive/ Associate/ Consultant/ Manager	Other	Assistant	Trainee	Admin support
Care of animals / Children / Vulnerable beneficiaries / Conduct of medical care /research	A							
Insolvency / dissolution / Fraud/Sham charities / Breaches of trust / Recovery of funds Financial mismanagement / Lack of internal controls/ Admin failure / conflict of interest / trustee disputes/ contract issues / poor governance	B							
Charitable trading issues / Management of Fundraising /control of associated costs	C							
Anti-terrorism	D							
Business Planning/Advisory work	D							

A3 Key Individuals

¹Please indicate the fee earner position/type/title of key individuals in accordance the matrix fees set out in A1 or A2

Individual	Fee Earner Type

A4 Blended or composite fixed rates

Please indicate one of the following

A single hourly rate can be applied for all executives handling work of a specific type and will be drawn from the fees detailed above.

Blended or composite rate options will not apply

A5 Maximum fee adjustments

Hourly fees will be subject to adjustment:

annually

every two years

¹ Note that this information will be used to inform the financial model. It is not an exclusive measure of value for money as key individuals may vary from case to case based on skills and experience required.

Please provide details of the source index that will apply to fees and details of the reference location

Salary inflation as per government published figures.

Where the scope of the assignment is known and its complexity is capable of assessment at the outset (phase 1), please indicate from the following options

A composite fixed fee option is available **including** disbursements and expenses.

A composite fixed fee option is available **excluding** disbursements and expenses

No composite fixed fees will apply. Fees will be calculated directly from hourly rates specified in Section A.

Fixed fees typically represent % discount on hourly fee arrangements

Capped fee arrangements are available.

C. Conditional fee arrangements (CFA's)

In contentious matters:

Conditional fee arrangements (Law Society) may apply as appropriate.

CFA's are not a supported option

D Services related to assets recovered

Charges will be raised for these services on the basis of a percentage of the value of assets recovered as follows:

Between	Fee
£0 to £50,000	%
£50,0001 to £250,000	%
£250,001 to £500,000	%
£500,001 to £1M	%
Over £1,000,000	%
Subject to a minimum fee of:	
Subject to a maximum fee of:	

% recovery charging is not a supported option

E: Remuneration packages supported

Subject to the particulars of a case, please **confirm** the remuneration package options:

a) Fixed inclusive fee

b) Quantum Meruit with VAT exclusive remuneration cap

c) VAT exclusive remuneration cap with % of net amounts recovered or protected

Combination of a - c

- Incentive based remuneration
- Fee exempt (for cases of a particular nature or status)
- Fees based on hourly charge rates only

F Discounting

Please indicate and complete the following:

(Volume) discounting of fees will apply when individual case fees reach £.
at %

(Volume) discounting of fees will apply when concurrent case fees reach £
at %

Discounting is reflected fully in hourly/fixed fee arrangements detailed above