



Social Security
Scotland

Tèarainteachd Shòisealta Alba

Charter Measurement Framework Review 2024-29 Research Report

Dignity,
fairness,
respect.

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Executive summary

The Charter Measurement Framework has been revised for the first time since it was created in 2019. The framework was revised as part of the work to review the Scottish Social Security Charter. The revised framework is published online here:

<https://www.socialsecurity.gov.scot/reporting/publications/charter-measurement-framework-update-2024-2029>

The review of the framework was essential to ensure it continues to fulfil its function as a way to show how the Scottish Government and Social Security Scotland are delivering the Charter commitments.

The approach to reviewing the framework would be agreed by the core client group involved in reviewing the Charter. As a technical analytical document, the review of the framework gathered detailed input and recommendations from analysts and officials. A summary of the changes is outlined below.

The revised framework has retained the original four sections and measures have been re-ordered to align with the structure and headings in the revised Charter. Around 15 original measures have been removed from the revised framework and a small number of new measures have been added. Measures have been removed or revised to reduce duplication, focus on meaningful reporting, and to more closely reflect the commitments in the revised Charter. Updates to the wording of measures reflect language used in the revised Charter and terminology used by Social Security Scotland. All original section four measures have been retained and updates to the wording of measures are minimal.

1. Introduction

This report sets out information relating to the changes made to the Charter Measurement Framework as part of the Charter Review and has been published at the same time as the revised framework.

1.1 Background

The Social Security (Scotland) Act 2018 requires the Scottish Social Security Charter, “Our Charter”, to be reviewed every five years. The first review took place in 2023 and was facilitated by officials and researchers from the Scottish Government and Social Security Scotland.

Research was carried out with Social Security Scotland clients, staff, and partner organisations to explore how the Charter was working, if it continued to align with their priorities, and to propose changes. A research report and summary were published which describe the research.¹ The output of the research was a proposed revised Charter. Based on this, officials made final recommendations for changes which were agreed by the Scottish Parliament in June 2024 and a revised Charter was published.²

As part of the process to review the Charter, researchers and officials also revised the Charter Measurement Framework. The framework was created in 2019 and was co-designed with people with experience of the social security system.³ The framework is a comprehensive list of measures relating to the commitments in Our Charter.⁴ Published annually, the framework shows how Social Security Scotland and the Scottish Government are delivering the Charter commitments and helps them improve.

1.2 Overview of the framework

The framework is divided into four sections that correspond with the sections of the Charter. Each section is made up of questions, ideal outcomes and a list of measures which contain data to answer the question and show how the ideals are being achieved.

¹ Reviewing Our Charter: Research Findings (2024): [Reviewing Our Charter: Research Findings](#) and Research findings from the Charter Review (2024): [Social Security Charter: Research findings from the Charter Review](#)

² [Revised Charter](#)

³ Developing a measurement framework for the Social Security Charter in Scotland: Analytical co-design in action (2019): [Social Security Charter measurement framework: co-design process - gov.scot \(www.gov.scot\)](#)

⁴ Social Security Charter: Measurement framework (2019): [Social Security Charter: measurement framework - gov.scot \(www.gov.scot\)](#)

Each year, the framework is filled in using a range of data. Detailed information about the data used is provided in each framework publication and is summarised below.

The first three sections are made up of around 70 measures and cover how social security is delivered and experienced by clients, Social Security Scotland staff, and stakeholder organisations. Some measures call for numerical data, like percentages, and some ask for 'examples' which are drawn from qualitative data, such as client testimony. The data used to report these measures come from a range of sources including the Social Security Scotland Client Survey, official statistics, and management information. A range of research is also carried out with clients, staff and partner organisations to understand participants' experiences.

The fourth section of the framework corresponds to the final section of the Charter, 'A better future', which is made up of commitments to be delivered by the Scottish Government. The framework lists eight measures which cover ideal outcomes related to the social security policy-making process, how social security is promoted, and the impact of benefits. These measures rely on narrative descriptions of activities undertaken by the government and show what is being achieved over the longer term. Officials provide this information each year for inclusion in the annual framework publication.

Each published framework covers the previous financial year. To date, five frameworks have been published covering the period 2019-20 to 2023-24.⁵ Over time, the number of measures reported in each framework has increased as more data has become available and more benefits have been rolled out. A timetable setting out when measures would be first reported was included in the report describing how the framework was developed.⁶

⁵ Links to published frameworks can be found on the Social Security Scotland website here: [Social Security Scotland - Our Charter](#)

⁶ See footnote 3.

2. Approach and key findings

Reviewing the framework was not part of the formal legislative requirements which set out how the Charter should be reviewed. However, it was important to include the framework in the review process. This was to ensure the framework could continue to fulfil its function as a way to show how the Scottish Government and Social Security Scotland are delivering the Charter commitments.

Information about the approach to reviewing the framework is set out in the Reviewing Our Charter research report.⁷ The key aspects are summarised below:

- The framework should be revised to reflect changes to the Charter to retain the close alignment between the documents.
- Research carried out for the Charter Review would gather feedback from clients, staff and partner organisations about how the framework is working and how it is communicated.
- As a technical analytical document, the review of the framework would require detailed input and recommendations from analysts and officials.
- The approach to reviewing the framework would be agreed by the core client group involved in reviewing the Charter and build on their recommendations for the Charter itself.
- The review of the framework would also consider updates which ensure measures better align with how Social Security Scotland works in practice and the availability of data.

⁷ Reviewing Our Charter: Research Findings (2024): [Reviewing Our Charter: Research Findings](#), sections 6 and 19.

2.1 Research findings

Feedback about the framework from clients, staff and partner organisations who took part in the review are set out in the Reviewing Our Charter research report.⁸ Key findings are summarised below.

- Accountability was a key priority for stakeholder groups. They said it was crucial that the Scottish Government and Social Security Scotland show how they are delivering the Charter commitments.
- Awareness of the framework and other performance data that is published about the social security system was limited among clients who took part. Some partner organisations who took part also thought awareness of the framework was low among clients.
- Partner organisations gave positive feedback that the framework covers things that are important to clients and that it brings together a range of data about performance into one document.
- There were suggestions from clients and partners for the framework to include more information about continuous improvement including how feedback is used, improvements that had been made and what was next. Clients suggested this could take the form of “have done / will do / aspire to do”.
- Some partners said the framework was too long. Clients said it is important that performance should be summarised and communicated in a way that clients can easily engage with. There were suggestions for more visual communication of data such as charts.
- Feedback from analytical staff highlighted issues including duplication among measures, where data is not collected and so makes reporting some measures difficult, and limitations in what can be reported based on small sample sizes and ethical requirements for anonymisation.

⁸ Reviewing Our Charter: Research Findings (2024): [Reviewing Our Charter: Research Findings](#), sections 9.2, 13.5, 16.3, 18.3.

3. Changes to the framework

A set of criteria for change were developed to identify and guide changes to the framework. These covered the key issues: alignment with the Charter, reducing duplication, and revising measures where data is limited or cannot be reported for reasons of confidentiality.⁹

The revised framework retains the original structure and most original measures. The most substantial change is the movement of measures between sections to reflect the new ordering of commitments in the revised Charter. The sections below give examples of changes but are not exhaustive.

3.1 Removed measures

Around 15 original measures have been removed from the revised framework. In some cases, measures have been removed to reduce duplication. Where multiple measures covered the same or similar themes, revised measures have been streamlined. The box below shows an example of where measures have been brought together to avoid duplication.

Original measure: X percentage of clients said they were paid the amount Social Security Scotland told them they would get from the first time

Original measure: X percentage of clients paid correct amount from the first time

Revised measure: X percentage of clients said they were paid the correct amount from the first time

Another example of removing duplication is the measures below relating to clients' views on the time taken by Social Security Scotland to handle applications and enquiries.

Original measure (retained): X percentage of clients said their application or enquiry was handled within a reasonable time frame

Original measure (removed): X percentage of clients said their time was not wasted

Measures were also removed where reporting did not provide meaningful insights. An example of this is shown in the box below.

⁹ For more information on the criteria for change, see Reviewing Our Charter: Research Findings (2024): [Reviewing Our Charter: Research Findings](#), section 19.2.

Removed measure: X percentage of social security offices pass the accessibility checklist (Checklist to be agreed by disabled people with lived experience)

Although appointments with clients can be held in person at a venue, clients may prefer to meet Social Security Scotland via a video or telephone call, or in their home. The revised Charter highlights the choice available to clients in how they communicate and engage with Social Security Scotland. It is therefore more meaningful for framework measures to focus on clients' experiences than accessibility of venues which they might not visit.

Another example where a measure has been removed due to limited meaningful reporting is shown below.

Removed measure: X number of service level agreements in place with external partners

'Service level agreements' is a broad term which covers various aspects of corporate service delivery. This measure has been removed as reporting does not cover meaningful aspects of client, staff, or partner experiences with Social Security Scotland and is not directly covered by commitments in the revised Charter.

Another example of a measure which has been removed is shown in the box below.

Removed measure: X percentage of staff say they feel confident to deliver a service that reflects the values of a human rights based system as set out in our Charter

As a detailed concept, this measure is difficult to turn into a research question which can capture meaningful responses from staff. The social security principles underpin all of the commitments which make up the Charter and are therefore at the heart of the Charter Measurement Framework.

3.2 New commitments

A small number of new measures have been added to the framework. An example of a new measure is shown in the box below.

New measure: Positive and negative (if any) examples from clients of support provided by staff to make an application or where more support was needed

This measure has been added to reflect the new commitment at the start of section two of the revised Charter which sets out how clients are supported to complete an application in a way that suits them.

Another example of a new measure is shown in the box below.

New measure: Examples of feedback from partner organisations on how Social Security Scotland responds to feedback and complaints

This measure has been added to expand on original measures which look at partner organisations' experiences with Social Security Scotland. The new measure also recognises the emphasis on accountability which was highlighted as a key priority in the research carried out to review the Charter.

3.3 Measures which are reported using qualitative data

Some measures ask for examples of particular experiences and are reported using qualitative data from clients, staff or partner organisations. Revisions to these measures focus on simplifying measures, reflecting that not all experiences may be captured in qualitative research, and removing duplication. An example of this is shown in the box below.

Original measure: Examples of when staff were knowledgeable, of how they explained decisions well, of clients feeling able to challenge AND examples of not understanding decisions, examples of why clients felt unable to challenge AND Social Security Scotland action taken

Original measure: Examples of reasons for redetermination and why or why not decision was changed, examples of redetermination process from client and staff points of view

Revised measure: Positive and negative (if any) examples from clients of when staff were knowledgeable about social security or when they did not have the right knowledge to help them

Revised measure: Examples of why clients challenged or did not challenge a decision and their experience of the re-determination process

Themes across the original measures have been split out into distinct measures which will simplify both the research needed to evidence the measures and the reporting. The readability of the measures has been improved by simplifying the language.

Another example of how qualitative measures have been updated is shown below.

Original measure: Examples of treatment that made clients feel comfortable, kindness, trust, listening AND examples of treatment that was less so AND Social Security action taken

Original measure: Examples of good practice AND examples of discrimination (if any) AND Social Security Scotland action taken

Revised measure: Examples of positive and negative (if any) experiences with staff. If research for this measure returns any examples of discrimination, or good practice to advance equality, these will be included in the reporting

The original measures covered multiple concepts and required repetitive questions in research with clients to address each point, causing research and participant burden. Research with clients is voluntary and as such, some or all of these experiences might not be captured. Further, for reasons of confidentiality, it is difficult to report on 'action taken' as details from Social Security Scotland may identify individual clients or members of staff. The revised measure reduces these issues while continuing to broadly cover the commitments set out in the Charter regarding experiences with staff.

3.4 Meaningful reporting

Some original measures have been retained but revised to focus on providing more meaningful reporting which more closely aligns with the revised Charter. An example of this is shown in the box below.

Original measure: X percentage of Social Security Scotland documents are ready on request in accessible formats

Revised measure: X percentage of clients said that they could access information in a format that was accessible to them

Reporting for the original measure has remained static over time. The revised Charter highlights that information and support is available in ways which meet clients' needs. To more fully capture this, the revised measure focuses on clients' experiences and reflects a broader range of communication.

Another example of where a measure has been updated to provide more meaningful insights is shown below.

Original measure: X percentage of learning packages delivered to staff are informed by clients

Revised measure: Examples of learning packages delivered to staff that are informed by clients and the organisations that represent them

The revised measure now more closely aligns with the revised Charter commitment that sets out how clients and partner organisations are involved in helping Social Security Scotland staff to understand the needs of clients. Given the breadth of job roles and the variety of training which staff at Social Security Scotland undertake to do their job, including technical and systems training, it is more meaningful to report examples which demonstrate the Charter commitment.

3.5 Updates to language

Updates to the wording of measures reflect changes in the language used in the revised Charter and bring measures into line with terminology used by Social Security Scotland. An example of this is shown in the box below.

Original measure: X percentage of people who had a face to face assessment for disabled people's benefits said the consultation was carried out by appropriately qualified staff

Revised measure: X percentage of clients who had a consultation for a disability benefit said that it was carried out by a health and social care practitioner who understood their condition and the impact it has on them

This measure has been updated to more accurately reflect language used by Social Security Scotland. The revised measure is also a more meaningful way for clients to provide feedback about their experience as it is not possible for clients to assess the qualifications of the staff they are in contact with.

3.6 Section four

All original section four measures have been retained and updates to the wording of measures are minimal. This reflects the limited revisions to the commitments in this section in the revised Charter. An example of a revised measure is shown in the box below.

Original measure: Evaluation programme drawing on the experience of those receiving benefits

Revised measure: Evaluation programme drawing on both the experience of those receiving benefits and wider analysis about the impact of payments in contributing towards tackling poverty and inequalities

The revised measure now better reflects the breadth of evaluation work ongoing in this area.

In the original framework, measures in section four were organised under 12 level three outcomes. These have been reduced to three outcomes in the revised framework, grouping related measures in line with the new headings used in the revised Charter.

3.7 New outcomes

As a result of structural changes to the framework to align with the revised Charter, new outcomes have been introduced to group measures in line with the structure and headings in the revised Charter. The majority of these new outcomes are in section two, reflecting the comparatively more substantial changes to this section in the revised Charter, including the new commitments added to this section. Examples of new outcomes are shown in the box below.

Section 2: Do processes work?

Original outcome:

- Processes work well

New outcomes:

- Clients are supported when they make an application
- Clients are kept updated and given information about what will happen and why
- Clients receive clear and accurate decisions and receive the right amount, on time
- Clients feel able to challenge decisions and are supported to do so

3.8 Design

The co-design process to create the framework included aspects of creative design including branding and a summary page which presents key results in a visual format. The introduction to the framework was updated by Scottish Government and Social Security Scotland officials to reflect the review and to make sure it remained in line with policy and delivery requirements. The framework has retained the original design but has been refreshed by the Social Security Scotland creative communication team.

4. What's next

A revised framework has been published and is available online at <https://www.socialsecurity.gov.scot/reporting/publications/charter-measurement-framework-update-2024-2029>

The first framework based on the revised measures will be published in late 2025. This framework will cover the period 2024-25 and will report on all revised measures.

All published frameworks are available on the Social Security Scotland website.¹⁰

¹⁰ Social Security Scotland, Our Charter: [Social Security Scotland - Our Charter](#)

How to access background or source data

The data collected for this social research publication:

- ☐ are available in more detail through Scottish Neighbourhood Statistics
- ☐ are available via an alternative route
- ☒ may be made available on request, subject to consideration of legal and ethical factors. Please contact ResearchRequests@socialsecurity.gov.scot for further information. This email address is for research related requests only. Any unrelated queries (e.g. benefit information) will be automatically deleted.
- ☐ cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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