



Social Security Scotland
Tèarainteachd Shòisealta Alba

Social Security Scotland Charter Research 2020-2021



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Executive summary

This report presents results from research with Social Security Scotland clients, staff and partners. The research was designed to provide data for a range of measures in the 2020-21 Charter Measurement Framework. The [Charter Measurement Framework](#) is a co-designed list of measures. It shows how Social Security Scotland and the Scottish Government are getting on with delivering the commitments in [Our Charter](#).

This was the first time annual bespoke research was carried out with clients, staff and partner organisations for the Charter Measurement Framework. The research took place in summer 2021. Alongside the statistics from the Client Survey, it forms a key source of data on people's experiences of Social Security Scotland.

A range of methods were used across the three strands of research. The research involved interviews with 35 clients from our Client Panels; a survey completed by 92 staff on the People Panel (50% response rate); a focus group with 5 Client Experience staff; and a survey sent to 92 partner organisations which received 13 responses.

The sections below provide more information on the headline findings from each theme of the research. Findings from this report appear in the relevant sections of the Charter Measurement Framework report for this year.

A People's Service

Staff attitudes reflect Our Charter

Client interviewees who spoke to staff said they made them feel comfortable and treated them with kindness. Staff were described as polite, sensitive, respectful and friendly, as well as being patient and empathetic. Interviewees said they felt trusted by staff. They noted staff manner and using a first name basis as reasons for feeling

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trusted. Some said that staff were open and honest which helped to build a sense of mutual trust. A few said they felt confident to talk openly with staff and to contact Social Security Scotland again in future.

The majority of interviewees said staff listened to them and understood their needs. Some felt staff had adapted to meet their needs. A few said staff let them express themselves and took care to understand what they were saying. Some favourably compared their experience with Social Security Scotland staff to previous experiences with the Department for Work and Pensions.

A few interviewees had mixed experiences with staff. Some said that whilst they had been treated well by staff, they were unhappy about other aspects of their interaction. Examples included long call waiting times, dealing with an automated service at the start of a call, and poor sound quality on the call itself. No interviewees gave specific examples of being treated badly by staff, or of action then taken by Social Security Scotland. Although there hadn't been many complaints about staff manner, one Client Experience staff participant mentioned a case where a client had complained following an interaction with staff. The client who made the complaint was unhappy with how they had been spoken to by the staff member and felt they had been treated badly during the call.

Experiences of discrimination

Client interviewees said they had never felt any discrimination at any point during their experience with Social Security Scotland. There was a general feeling that people were being treated fairly and equally. Interviewees said they had felt welcomed, trusted by staff and that processes and communications had been easy and accessible.

Staff respondents were asked to rate their ability to deliver a service free from discrimination. Almost all (96 per cent) said they felt confident or very confident in their ability to deliver a service without discriminating against others.

A common reason for feeling confident was due to Our Charter providing a clear set of values to work to. Others talked about training, developing self-awareness of their behaviours, and getting guidance from colleagues and managers as things that had helped them to feel confident about delivering a service without discrimination. Some felt that ongoing training and awareness sessions would help them to feel more confident to work without discriminating against clients or colleagues.

Clients find staff knowledgeable and approachable

The majority of client interviewees said staff were knowledgeable and helpful. Most said staff were able to answer their queries and gave them the information they were looking for. Several said staff were knowledgeable about Social Security Scotland's benefits and offered information about other benefits they may have been entitled to. However, a couple of interviewees said they wanted more information about Social Security Scotland's benefits or other support but were not offered this by staff. One said a new member of staff had been unable to answer their question when they phoned.

Most client interviewees described straightforward decisions on their applications and felt they understood the decision. Most received a decision by letter. Interviewees that had spoken to staff about a decision felt staff explained it clearly and compassionately. A few felt the decision was not clear and they did not fully understand it. Some were confused by the letter and said it was not always clear which application the letter was about. A couple of interviewees said they received a benefit payment before getting their decision letter and felt this was confusing.

Some client interviewees felt unable to challenge decisions. Interviewees cited going through a bereavement or anxiety around contacting Social Security Scotland as reasons for not feeling able to challenge the decision. One interviewee had a negative experience when they asked for their Best Start Grant School Age Payment decision to be looked at again after their re-determination. The interviewee described

the experience as stressful and said they did not know what to expect from this process.

Staff knowledge and training

43 out of 92 staff respondents said they currently work with clients as part of their job. These respondents were asked about their job knowledge for supporting clients. Almost all (91 per cent) said they felt confident or very confident in their knowledge and skills to support clients.

In addition to the 43 respondents who said they currently work with clients, a further 10 respondents said their role will involve working with clients in future. Of these 53 respondents combined, around three quarters (74 per cent) agreed or strongly agreed that they knew about a range of advice and advocacy services for clients. Over half (60 per cent) agreed or strongly agreed that they knew how to refer clients to those services.

Of the 53 respondents who either work with clients currently or will in future, over half (57 per cent) agreed or strongly agreed that they knew enough about the re-determinations process to be able to explain it clearly to clients. Just less than half (47 per cent) agreed or strongly agreed that they knew enough about the appeals process to explain it to clients.

Respondents commented that training, ongoing learning and the availability of guidance had helped them to feel knowledgeable when supporting clients. When asked what would help them to feel more knowledgeable, respondents said guidance could be improved as it was incomplete, out-of-date or difficult to navigate.

Staff respondents who don't engage directly with clients were also asked to rate their job knowledge and skills. This included staff who never engage with clients as well as those who will engage with clients in future. Almost all (92 per cent) said they felt confident or very confident about their job knowledge and skills. These respondents said that their professional experience and training made them feel confident in their

job. Support from managers and colleagues was a common reason for feeling knowledgeable across respondents who work with clients and those who do not.

Respondents across the survey said they had taken part in training and support activities since joining Social Security Scotland. These included: online learning courses; self-directed learning; support from colleagues and managers; demonstrations; and seminars. Training provided by Social Security Scotland covered things like: understanding benefits and Our Charter; communicating inclusively; managing staff; and understanding diversity and discrimination. Some staff respondents said the training they had received had made them feel confident in their roles.

A few mentioned it would be helpful to have more in-depth training to understand how Social Security Scotland operates and what different teams do. Others mentioned a need for further training and support for staff who interact with clients and are new to their role. A couple of staff respondents said they had limited or no training for their role. Others highlighted a lack of training or support when they first joined Social Security Scotland or moved into their role, and some felt that the training they had received had been inadequate.

Support for staff

Almost all staff respondents (99 per cent) said they had felt supported or very supported at work during the last year. Most said they had good or very good support from their line manager (96 per cent) and that they would speak up if they saw something wasn't working or thought something was wrong (98 per cent). Almost all (92%) said they felt supported or very supported to communicate with colleagues in a way that felt inclusive of their needs.

Staff respondents referred to a culture of support within Social Security Scotland. Many highlighted support from managers and colleagues, and felt comfortable asking others for help. Respondents said managers had been understanding about personal challenges during the COVID-19 pandemic. Frequent communication with **Dignity, fairness, respect.**

colleagues and managers, and organisation-wide messages, had helped some to feel supported during the pandemic. For those respondents who reported not feeling supported or confident at work, issues were about workload, an expectation to work long hours and a need for further training. Some felt managers could have provided further support to help them feel confident and supported.

Around two fifths (38 per cent) of respondents said they had additional needs or requirements during the last year. Almost all (91 per cent) of those who had additional needs told someone about it. Staff respondents described needs across three main categories: equipment to aid working from home; needs related to caring responsibilities; and needs related to health and wellbeing. Respondents were positive about the support they had received to accommodate these needs. The few who chose not to tell anyone about their needs said they preferred to keep personal matters private or didn't feel able to talk about it.

Processes that work

Processes work well

This section presents headline findings on the re-determinations process and how Social Security Scotland's partner organisations think the service is working. The appeals process was not included in this research due to the low volume of appeals in 2020-21. Evidence on appeals will be revisited in future when the volume of appeals has increased.

Re-determinations

Client Experience staff participants felt the re-determinations process had been reasonably smooth from a staff perspective. They felt good about being able to help clients during a re-determination. However, they said internal systems sometimes made the process more complicated for staff in practice.

Client Experience staff participants described common reasons for re-determinations. Across benefit types common reasons were clients not meeting the eligibility criteria and a lack of evidence to demonstrate eligibility. Other reasons varied by benefit. Best Start Grant and Foods reasons included clients applying outside of the application window, or exceeding the income threshold. Funeral Support Payment re-determinations involved clients applying for ineligible funeral costs or feeling the payment was too low. Reasons for Job Start Payment re-determinations included clients not stating their care-leaver status in the initial application or not being out of work for 6 months at the time of the job offer.

Client Experience staff participants said decisions had been changed in instances where: staff had overlooked an evidence attachment; there had been a misunderstanding about a client's financial situation; and when clients started to receive qualifying benefits soon after submitting their application. Reasons for upholding a decision included clients not meeting the eligibility criteria for the benefit and where a client had applied outside of the application window.

How the service is working

Most partner organisation respondents were positive about the service. Ten out of twelve rated the service as good or very good. Eleven respondents stated that they had supported clients to apply for Social Security Scotland benefits. Of those eleven, nine said that looking up or making contact with Social Security Scotland with or for clients was easy or very easy. Ten rated going through the application process with or for clients as easy or very easy.

In their comments about what Social Security Scotland had done well when delivering the service, respondents felt that the benefit application process was quick and easy. Others felt that Social Security Scotland had done well in providing up to date and accessible information about the service, especially in relation to the roll out of new benefits. Respondents also thought Social Security Scotland had done well in delivering the service with the principles of dignity, fairness and respect.

Seven out of twelve respondents commented on what Social Security Scotland could have done better when delivering the service. A few said Social Security Scotland could improve advertising and raise awareness of the service and benefits. Others commented on the need to speed up delivery of the service by rolling out all disability benefits. One respondent felt that Social Security Scotland lacked presence in the Highlands and other rural areas.

Services are accessible

Most client interviewees said it was easy to access information about Social Security Scotland's services. Some felt the website was informative and easy to use. A few found it helpful to access information through Social Security Scotland's social media channels. Many interviewees talked positively about communicating with or receiving communications from Social Security Scotland. Most said letters were easy to understand and the language and layout was simple. However, one interviewee expressed difficulty with understanding the information in guidance, letters and application forms and felt this was a barrier to accessing Social Security Scotland's services.

Nine out of eleven partner organisation respondents thought Social Security Scotland's service had been accessible for clients. Respondents mentioned clear, accessible information on the website and the ability to apply online as positive examples of accessibility. Two partner respondents rated the service as not at all accessible. They mentioned examples where clients they were supporting had been digitally excluded from the service. When asked if Social Security Scotland had addressed this accessibility issue, both respondents said they or their organisation addressed the situation themselves.

Some staff respondents commented that the service was accessible and inclusive for clients, but others thought aspects of the service could be improved. One suggestion for improvement was the translation and interpretation processes for clients whose preferred language is not English. While one staff respondent felt the

translation service was 'easy to use', others said that processes were misunderstood among staff. Some said interactive, practical and more localised training would provide them with greater confidence to communicate with and enable clients in line with their needs.

A Learning System

Using feedback

This section presents the main findings about how Social Security Scotland has used feedback from clients, staff and partners to improve performance.

Additional Support for Clients

Client interviewees and staff respondents made suggestions about additional support Social Security Scotland can put in place for clients. Some client interviewees said email was their preferred communication method and would make it easier from them and others to interact with Social Security Scotland. Staff respondents made similar comments.

Client interviewees also suggested improvements to the online application process including: web chat support for completing the form; embedded guidance in the form itself; a reference number after submitting; and an online portal for updating their information and checking eligibility. A few client interviewees and staff respondents wanted clients to have clearer information on eligibility and key application dates. Some client interviewees also suggested additional support for particular groups such as targeted communications and extra information for elderly people and people whose preferred language is not English.

You Said: We Did

Client interviewees did not provide any examples of when feedback had led to changes in the way Social Security Scotland works. However, Client Experience staff participants said client feedback and complaints had led to changes to the website

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and updates to the telephony script with a shorter message and no duplication of information.

Eight out of eleven partner organisation respondents said they had given feedback to Social Security Scotland. Most said they provided feedback on a range of different issues through official stakeholder reference groups and felt that their suggestions had been acted on. Two said they did not know how to give feedback. One respondent said they provided feedback but felt that the organisation had not acted on this.

Staff respondents talked about providing suggestions to improve the client experience, such as working with other colleagues to review information and improve benefit take up. Other examples included improvements to data security and staff working patterns. However, some staff respondents were unsure whether their suggestions had led to an improvement. A few similarly commented that their suggestions had not been actioned because there is a 'backlog' of improvements which take priority, or because they felt that the suggestions were not taken on board.

Acknowledgement of mistakes

One client interviewee mentioned an example where Social Security Scotland had made a mistake. The interviewee had been overpaid and was sent a letter stating that this had happened in Social Security Scotland's error. The interviewee felt this action was open and honest. Client Experience staff participants mentioned other instances where Social Security Scotland had made mistakes including giving the wrong advice to a client and overlooking evidence with an application. In both examples, Social Security Scotland admitted the mistake and apologised to the client.

Two out of twelve partner organisation respondents said they were aware of a mistake made by Social Security Scotland. Only one respondent provided additional

information, describing an occasion when a benefit was disallowed by mistake. The application was looked at again and the benefit awarded.

Client experience of the complaints and feedback process

Very few client interviewees said they had experience of the feedback and complaints process. Some interviewees said they had nothing to comment on. Others did not feel the need to tell Social Security Scotland when things did not work the way they expected. Reasons for this included the issue being minor, not wanting to get a staff member into trouble or not knowing the best way to give feedback. One client interviewee said they had provided feedback about eligibility on an appeal form because they were not aware there was a formal way to provide comments or complaints.

Client Experience staff participants were asked about how the complaints process works for clients. Client Experience Officers said they often speak to clients directly during the complaints process. Participants said that clients have generally appreciated the personal contact with a Client Experience Officer during the complaints process and having a staff member listen to their complaint.

A trustworthy organisation

Nine out of twelve partner organisation respondents agreed or strongly agreed that Social Security Scotland is an open organisation. The same number agreed or strongly agreed that Social Security Scotland is an honest organisation.

Most client interviewees felt Social Security Scotland had been open with them by providing clear information about processes and timescales and regular updates on applications. One interviewee felt Social Security Scotland was open because they explained why they were doing certain things, alongside the what and the how.

A few client interviewees felt there were times where the organisation could have been more open and clearer about things. One interviewee said that it had been difficult to communicate with Social Security Scotland during the start of the COVID-

19 pandemic. Other interviewees felt there could be more awareness raising about Social Security Scotland's services and benefits, particularly for those without access to the internet.

A couple of client interviewees would have preferred Social Security Scotland to be more open by telling them that their Carer's Allowance Supplement would be ending, and some wanted to know about Carer's Allowance Supplement payment dates further in advance.

Working with other organisations

Nine out of thirteen partner organisation respondents agreed or strongly agreed that Social Security Scotland worked well with their organisation in 2020-21. When asked what Social Security Scotland had done well, respondents mentioned positive engagement through meetings, events and general communication. A few noted their involvement in a Social Security Scotland stakeholder group, or discussing and setting up co-location, whereby local delivery will use existing local buildings to meet with Social Security Scotland clients.

In terms of what could have been done better, respondents wanted more regular and consistent updates from Social Security Scotland, particularly for any changes to the service. One respondent asked for more publicising and advertising of Social Security Scotland's service, as well as information on benefit take up. Another asked for formal updates on any feedback that they provide through stakeholder groups.

Partner respondents were invited to make any further comments about their overall experience with Social Security Scotland. These comments were mixed. Some respondents were wholly positive in comments about their experience, commending staff and the service. Others felt there was more to be done in improving partnership working between Social Security Scotland and their organisation. They noted how they could provide Social Security Scotland with advice on how to improve the service through more regular and consistent communication.

Other feedback

Client interviewees were asked if there was anything else they would like to discuss about their experience with Social Security Scotland. Some expressed appreciation for benefit payments and described how these had made a positive difference to their lives. Those who had received Carer's Allowance Supplement or Young Carer Grant said the payments made them feel valued and recognised as a carer. Some felt the payments demonstrated that the Scottish Government cares about and wants to help people living in Scotland.

A few client interviewees said they were pleased to take part in this type of research and wanted to contribute to Social Security Scotland's continuous improvement. They felt the research provided a chance to share their experiences and express their views. A few mentioned that it felt good to be involved in the research and that they would like to participate in future projects.

Next steps

Findings from this report appear in the relevant sections of the Charter Measurement Framework report for this year. They will be fed into continuous improvement across Social Security Scotland.

The Charter Measurement Framework is published annually alongside Social Security Scotland's annual report and accounts. We will shortly begin designing next year's bespoke research with clients, staff and partners for the 2021-22 Charter Measurement Framework.

We intend to adapt next year's research based on lessons from this year. For example, we will look at options for surveying all Social Security Scotland staff instead of a sample. We will also try different research methods with partner organisations to engage a larger number of these participants next time.

Introduction

This report outlines findings from research with Social Security Scotland clients, staff and partners in 2021. The research was designed to provide data for a range of measures in the 2020-21 Charter Measurement Framework.

The Charter Measurement Framework

The Charter Measurement Framework is a co-designed list of measures relating to the commitments set out in [Our Charter](#). Our Charter was developed in 2018 with people with lived experience of the benefits coming to Scotland. In 2019 the [Charter Measurement Framework](#) was also co-designed. It shows how Social Security Scotland and the Scottish Government are getting on with delivering the commitments in Our Charter. It also helps Social Security Scotland and the Scottish Government to constantly improve what they are doing.

The Charter Measurement Framework is published annually alongside Social Security Scotland's annual report and accounts.

The Charter Measurement Framework contains a comprehensive list of measures of how Social Security Scotland services are working for clients, staff and stakeholders. The data is drawn from a range of sources, including the [Client Survey](#), the People Survey of staff and statistics publications.

Some measures in the Charter Measurement Framework are not covered by these sources. This is the case for the measures which ask for 'examples' rather than percentages. For example:

"Examples of treatment that made clients feel comfortable, kindness, trust, listening and examples of treatment that was less so and Social Security action taken"

There are also some measures asking for staff views that are not covered in the People Survey, which uses core questions set by the Cabinet Office.

This report outlines findings from our first annual bespoke research with clients, staff and partner organisations to report on these measures in the Charter Measurement Framework. The Framework measures were taken as a starting point to develop questions for the research. The researchers worked with colleagues to add in some additional questions to support continuous improvement.

We asked participants across all strands to think about their experiences in 2020-21 (specifically between 1 April 2020 and 31 March 2021) when providing their responses. However, as the research took place a few months after 31 March 2021 we cannot guarantee that all responses referred solely to 2020-21. Some participants may have talked about experiences slightly before or after this period.

Findings from this report appear in the relevant sections of the Charter Measurement Framework report for this year.

Research methods

A range of methods were used across the three strands of the research. Methods were chosen according to what kind of measures were relevant to each type of participant. Convenience for participants was also taken into account.

Researchers conducted 23 interviews with Client Panel members, and added relevant questions to 12 interviews taking place for another Client Panels project. Client Panel members are people who have applied for or received payments from Social Security Scotland. They have opted in to taking part in Client Panels research while completing Social Security Scotland's Client Survey. 169 Client Panel members were invited to take part in an interview.

Client Panel members were initially sampled based on whether they had reported particularly positive and/or negative experiences in their responses to the Client Survey. The final sample was selected to include a mix of benefit experiences across all benefits available before 31 March 2021. It was also checked to ensure sufficient representation of ethnic minority people, young people, people with a long-term

health condition or illness and a balance of men and women. The interviews took place over the phone or by video call in summer 2021. Participants in these interviews are referred to as 'client interviewees' in this report.

A survey was sent to members of Social Security Scotland's People Panel. The People Panel is a newly formed panel of Social Security Scotland staff with representation from across the organisation. This was the first research project with the People Panel. All People Panel members (182 people) were invited to complete the survey in July 2021, and 92 people took part, a response rate of just over 50%. It should be noted that this was a sample of the total number of staff in Social Security Scotland. Next year we aim to survey all staff to allow firmer conclusions to be drawn from the findings for the questions presented as percentages. Respondents to this survey are referred to as 'staff respondents' in this report.

A focus group was carried out with members of Social Security Scotland's Client Experience team. This team work on cases where clients challenge a decision, and on complaints, compliments and suggestions from clients. The focus group took place online in August 2021. 5 members of the Client Experience team took part. Participants in this focus group are referred to as 'Client Experience staff participants' in this report.

Finally, a separate survey was sent to a range of partner organisations in July 2021. We issued the survey via email to all 92 stakeholder contacts on the National Engagement database held by Social Security Scotland. This database includes advice providers, equalities groups, health professionals, children and families support services and public bodies. We also sent the survey to the managers of Scotland's 60 Citizens Advice Bureau, featured a piece on the Citizens Advice Scotland newsletter and issued tweets on Social Security Scotland's official Twitter page. The survey was open for three weeks. In total, we received 13 responses. Respondents to this survey are referred to as 'partner organisation respondents' in this report.

About the participants

Of the 35 client interviewees, 21 were female and 12 were male. One interviewee preferred not to state their gender when they signed up to the Client Panels and one left the question blank. The oldest client interviewee was 83 years old and the youngest was 17. There were 5 ethnic minority interviewees. 17 interviewees had a long-term physical or mental health condition or illness. Among the 35 client interviewees, there was experience of every Social Security Scotland benefit available before 31 March 2021. These benefits were: Carer's Allowance Supplement, Best Start Grant and Foods, Scottish Child Payment, Child Winter Heating Assistance, Job Start Payment, Young Carer Grant, and Funeral Support Payment.

Respondents to the staff survey provided some information about themselves. Around three fifths were female. More than half were aged 45 or over. There were fewer than five ethnic minority respondents and one third said they were disabled. Around two fifths were A-Band staff and a similar number were B-band, with around one fifth C-band or higher¹. Three quarters of respondents were full time staff. Full tables of the participants' characteristics are at Annex A.

Of the 5 Client Experience staff who participated in the focus group, all were B band staff. Some had worked in the Client Experience area of Social Security Scotland for a number of years, whereas others had joined the team more recently. All participants were able to contribute to questions on re-determinations and appeals as well as complaints, compliments and suggestions. However, some were more experienced in the re-determinations and appeals side of Client Experience, whilst others were more practiced in dealing with complaints, compliments and suggestions.

¹ A-band staff are the least senior, with C-band and higher staff being most senior.

Of the 13 partner organisation respondents, 10 answered that they were responding as an organisation, drawing on the experience of a variety of colleagues. All respondents said that they worked for a Third Sector, Charitable Organisation or Advice Provider. 9 out of 13 respondents said that their organisation worked both in partnership with Social Security Scotland and with Social Security Scotland clients and potential clients.

We have avoided acronyms throughout this report to make it easy to read. This includes replacing acronyms with the full words in quotations. This does not affect the meaning of the quotes.

1. A People's Service

This section will outline findings from all strands of the research that are relevant to the first sections of Our Charter and the Charter Measurement Framework; A People's Service.

Staff attitudes reflect Our Charter

The Charter Measurement Framework asks for “Examples of treatment that made clients feel comfortable, kindness, trust, listening AND examples of treatment that was less so AND Social Security action taken.”

Client interviewees were asked how they were treated by Social Security Scotland staff. This included whether staff treated them with kindness, listened to them and made them feel comfortable and trusted or not. All of the interviewees who interacted with staff during their experience had done so by telephone.

The majority of interviewees said they had a positive experience when speaking with staff. Most said staff made them feel comfortable. They highlighted staff manner as one of the main reasons for this. Several interviewees said staff were polite, sensitive, respectful and friendly during their interaction. They felt comfortable expressing themselves to staff. A couple of respondents said they felt more confident to contact Social Security Scotland staff again in future as a result of feeling comfortable during their initial interaction.

“[I was treated by them] really well. I just felt like everybody was well trained, friendly, personable, understanding. They focused on confidentiality and understood the sensitivity of the conversation. It’s just been a really good experience when talking to someone. [...] I felt comfortable to approach the organisation every time I’ve had an issue. I feel respected and valued and just really positive about it. I feel it’s an organisation I can trust.” **Client interviewee**

“They were very supportive in saying ‘look we understand that you’re waiting’ and stuff like that, and they made you feel that you’re not just phoning to be a pain. They were understanding that you’re looking to get information. They were helpful about it. They were supportive and understood enough. [...] They knew what they were talking about and they could check the systems and stuff [...] Everything was answered brilliantly. I was really impressed.” **Client interviewee**

“It was absolutely fantastic, since I found out about it. The phones were answered really quickly for starters and the person I spoke to was really kind and said everything I need[ed] to know. [...] The person who answered the phone was really lovely and seemed happy. You don’t normally get [that]. They were great. They didn’t need to pass me to another department. The person who answered the phone was able to tell me everything I needed to know.” **Client interviewee**

“I felt quite easy [in the phone call], because sometimes people can get quite abrupt, but staff were easy and quite patient. [...] I found it was quite a good experience.” **Client interviewee**

Most interviewees said they were treated with kindness by staff. Interviewees thought that staff were patient and empathetic. They felt staff were understanding and genuinely cared about their query. Several appreciated not feeling rushed by staff. Detailed examples of staff kindness were reported by two interviewees, both of whom had experience of applying for Funeral Support Payment.

“Great empathy. They were great honestly. I couldn’t fault them at all. They were very knowledgeable, very understanding. And when I said I didn’t know something I wasn’t made to feel like ‘why did you not know that?’ Sometimes when you speak to somebody you can feel like you’re being talked down to. At no point was I made to feel awkward or like I shouldn’t be on the phone, or that there was a time restriction. There was nothing like that. She was really really supportive. I can’t say it enough. She was great. [...] I felt she was very genuine. I felt that she really felt for me.” **Client interviewee**

“I have to admit I went on that phone [call] a wreck but when I came off the call I felt a lot better. The call was simple. It was not in any way threatening, it did not make me feel distressed. [The advisor] would stop me at any time to make sure that I was all right. The call took half an hour but I would say only 10 minutes was about the thing I phoned for itself. The rest was them chatting to me, taking me through things, being empathetic. It was good, quite lovely.” **Client interviewee**

Several interviewees said they felt trusted by Social Security Scotland staff. They noted staff manner and using a first name basis as reasons for feeling trusted. Some felt staff were open and honest with them which helped to build a sense of mutual trust. A few said they felt more confident to talk openly and candidly with staff as a result of feeling trusted.

“There was absolutely never a feeling that she was trying to catch me out. Nothing like that. I didn’t feel like there was any underhanded-ness or agenda other than helping me.” **Client interviewee**

“Just the fact that they don’t rush you off the phone. They do go out of their way to help you and find out whatever you want and help with stuff.” **Client interviewee**

The majority of interviewees said Social Security Scotland staff listened to them during interactions. They felt staff listened carefully to and understood their needs. A couple of interviewees also mentioned that staff let them express themselves and took care to understand what they were saying.

“I felt as if they understood what I was asking and were able to answer my questions. It didn’t make me feel as if [they] didn’t know what it was for. They made sure that my questions were answered. [...] Just them being quite helpful in providing information I hadn’t asked for. [...] They were putting my mind at ease.” **Client interviewee**

“[Did you feel understood?] Yeah, they understood [...] With any money coming into my bank I phone and ask questions before spending the funds... Obviously my accent, I’m from [city], but the person understood me and never asked me to repeat myself.” **Client interviewee**

“They’ve been very good. They seem to listen and understand quite well what the problem is. Yeah, it’s been good.” **Client interviewee**

As well as feeling listened to, some interviewees felt Social Security Scotland staff had been particularly helpful and had adapted to meet their needs. One respondent said:

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“I always find it easy expressing myself but people don’t always understand me. They don’t understand what I mean and what they take from that are two completely different things normally. But they were really clear and really helpful. I do actually remember I phoned about my son’s Disability Living Allowance. I ended up phoning Social Security Scotland and they were by far the most helpful compared to the Department for Work and Pensions and it wasn’t even their [benefit]. The advisor wasn’t sure if Disability Living Allowance had been handed over to them yet [...] but at least she was helpful in trying to find out.” **Client interviewee**

Some interviewees favourably compared their experience with Social Security Scotland staff to previous experiences with other government departments.

“I can’t say anything bad about them. They’ve always been polite and helpful on the phone. There’s nothing I could say that’s [negative] [...] You’re not getting talked down to. I feel when you phone tax credits they just speak down to you. Whereas [here] it’s like somebody is speaking to you to help you. You don’t get talked down to here. I don’t know, it’s different. [...] You don’t mind picking up the phone to ask them a question.” **Client interviewee**

“I felt that it was fine to apply and check whether I was eligible. I didn’t feel like I was wasting Social Security Scotland’s time or that there would be any problem with applying just to check whether I was eligible. It feels like a really welcoming system. There seems to be quite a big emphasis on making sure that people feel comfortable to apply and are able to access the service. That is the opposite of what I’ve experienced with the UK system.” **Client interviewee**

“To me, personally, you’re not a person with the Department for Work and Pensions. They don’t care. Any person I’ve spoken to in Social Security Scotland appeared to care and that’s a total difference. That makes me even more relaxed about talking to people within the system. Because the biggest fear of anyone is that their benefit is going to stop. And I can appreciate that, but you’ve got to be honest and say ‘my condition is getting better or my condition is getting worse or it’s still the same or I’m taking new medication or whatever’. It’s about the honesty and communication between both parties that makes it all the easier to deal with.” **Client interviewee**

A few interviewees had mixed experiences when interacting with Social Security Scotland staff. Some said that whilst they had been treated well by staff, they were unhappy about other aspects of their interaction. Examples of this included long call waiting times, dealing with an automated service at the start of a call, and poor sound quality on the call itself. No interviewees gave specific examples of being treated badly by staff, or of action then taken by Social Security Scotland.

“Once I get through to someone and I get past the robot, they’re always amazing. They’re always so helpful, that is one thing I would say a million times. They’re one of the easiest people to talk to. I don’t know how they do it, they just do. [...] It depends on when you phone but they’re really nice. They always make you feel trusted, safe. They’re easy to talk to. [...] The staff do listen, but sometimes it’s hard to hear them. I don’t know if it’s just because of the Wi-Fi or the phone line or how busy Social Security Scotland are.” **Client interviewee**

“It was last year during the pandemic. I’m going say it was possibly July or August. It would have been about the [Best Start] School Age Payment. I was getting people saying ‘Oh that’s mine coming, that’s mine coming. I’ve heard! I’ve heard!’ And I’ve been following the Facebook page... the Social Security Scotland Facebook page. And that was also saying that people were starting to get it. So that’s when I phoned to see because by this point I’d heard nothing at all from them and that’s why I phoned.” **Client interviewee**

In contrast, whilst some interviewees were unhappy with long call waiting times others said their call was answered promptly.

“Yeah, very easy, all the times [I phoned] the calls were answered really quickly and the person that answered the phone was able to tell me everything I needed to know.” **Client interviewee**

Partner organisation respondents were also asked about their experience of speaking to Social Security Scotland staff on behalf of clients. Six out of eleven respondents rated their experience as being good or very good. Two respondents said the experience was neither poor nor good, and two said it was not applicable to them. One respondent rated the experience as poor.

The Charter Measurement Framework measures in this section all relate to client experiences of staff. In the research, we also asked staff directly about their relationship to Our Charter.

Staff from the People Panel who took part in the survey were asked about their engagement with the commitments set out in Our Charter (Table 1.1).

Table 1.1: Staff engagement with Our Charter
(n=92) Row percentages

How much do you agree or disagree with the following...	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree
I am familiar with the commitments set out in Our Charter	92%	4%	3%
I consider the commitments in Our Charter when I carry out my work	89%	8%	3%

Almost all (92 per cent) agreed or strongly agreed that they were familiar with the commitments set out in Our Charter. Most (89 per cent) also said that they consider these commitments while carrying out their work. A small number (3 per cent) disagreed or strongly disagreed with each of the statements.

Staff respondents said how confident they felt to deliver a service that reflect the values of a human rights system, as set out in Our Charter (Table 1.2).

Table 1.2: In the past year, how confident have you felt to deliver a service that reflects the values of a human rights-based system as set out in Our Charter?
(n=91) Column percentages

Response options	All respondents (n=91)
Very confident	45%
Confident	51%
Not confident	3%
Not at all confident	1%

Almost all (96 per cent) staff respondents said they felt confident or very confident to deliver a service in line with Our **Charter**. **Respondents were asked what had helped them to feel confident. Many said the values set out in Our Charter were reflected in staff attitudes and ways of working.** Comments said there was a strong awareness of and respect for the values in Our Charter. Some comments mentioned training to understand the commitments made in Our Charter and how to apply them in their day-to-day work. Others mentioned ongoing support and communication about Our Charter and the importance of its values to the work of Social Security Scotland. A couple of respondents mentioned that feedback from staff is encouraged if they notice something that doesn't align with the values in Our Charter.

“Consistent messaging and tying the Charter into key working objectives. Also good training that generated discussion about it, monthly 1-2-1s, [intranet] news feed - regular news about the Charter and things relating to it e.g. business plan.”
Staff respondent

“Aware that feedback is welcome and changes are made where needed if things aren't working.” **Staff respondent**

Staff respondents were also asked if there was anything that would make them feel more confident. Some mentioned further or ongoing training to understand Our Charter and apply it in their work. Others mentioned regular communication about Our Charter to raise awareness and keep it at the front of staffs' minds. Some also mentioned that it was important that all staff continued to work in ways which reflect the values in Our Charter.

“At times when you are in the depths of day to day work the Charter is not in the forefront of your mind. Perhaps regular events and communication around it would help to further instil it.” **Staff respondent**

“If everybody took on the same approach and realised that it is our individual actions that create a great culture to work in, this would then impact on the delivery of service to clients.” **Staff respondent**

Experiences of discrimination

Under the heading “Clients do not experience discrimination”, the Charter Measurement Framework asks for “Examples of good practice AND examples of discrimination (if any) AND Social Security Scotland action taken”. In a later example about staff training (see below) it also asks for examples of staff knowledge of how not to discriminate. In the research we also asked staff for their own experiences of discrimination as employees.

Client interviewees and staff respondents were asked about their experiences of discrimination when interacting with or working for Social Security Scotland. Client interviewees said they had never felt any discrimination at any point. There was a general feeling that people were being treated fairly and equally by Social Security Scotland, and interviewees contrasted this with their past experiences with the Department for Work and Pensions. Interviewees responded that they had felt welcomed, trusted by staff and that processes and communications had been easy and accessible.

“Absolutely not, I’ve not felt discriminated at all. In fact I’ve actually felt quite welcomed. I don’t feel like I’m going ‘cap in hand’. I’m dealt with as an individual and one fine individual. Someone who has a right to a benefit. Whereas sometimes with the Department for Work and Pensions, as I’ve said, they don’t care. They really don’t care.” **Client interviewee**

Staff from the People Panel who completed the survey were asked to rate their ability to deliver a service free from discrimination. Table 1.3 shows the results of this question.

Table 1.3: In the past year, how confident have you felt to deliver a service without discriminating against others?
(n=91) Column percentages

Response options	All respondents (n=91)
Very confident	66%
Confident	30%
Not confident	4%
Not at all confident	0%

Almost all (96 per cent) said they felt confident or very confident in their ability to deliver a service without discriminating against others. Among all staff respondents, less than 5 per cent said they weren't confident to do this.

Most staff respondents made comments about working to reflect the values of dignity, fairness and respect as set out in the Charter. They felt confident about delivering a service without discriminating against clients or colleagues because they had clear organisational standards and a set of 'rules' to work to. Respondents spoke of these values and messages being regularly mentioned and discussed.

"The culture and value of Social Security Scotland. Fairness, Dignity and Respect. Absolutely understand the ethics and try to live and breathe them to the best of my abilities. Always mindful and always putting myself in the shoes of the client. Very aware of Equality and Diversity and that social security is a human right for citizens of Scotland and the basis of the benefits we deliver." **Staff respondent**

“Clients are at the core of why we are providing these services. It's evident in everything that is communicated to me that this is the case. Dignity, Fairness and Respect aren't a gimmick and are genuinely the main drivers for me and this is reinforced daily.” **Staff respondent**

Respondents talked about receiving training sessions on discrimination and how to avoid it, as well as of developing self-awareness of their behaviours. Respondents also spoke of looking to colleagues and managers for guidance and support.

“I have been given great training and refreshers so that I am mindful of differences [...] I always keep in mind who I work for and who I am helping. Both answers are the same: people in need. I realize the applications I either process or approve are actually people and I have to do the best I can for them. I keep in mind what I was taught on the very first day which is Dignity, Fairness and Respect. Most of my confidence comes from treating others as I would want to be treated in similar circumstances.” **Staff respondent**

“I have had sufficient training e.g. Unconscious Bias and I'm experienced and fully aware that no one should be discriminated against.” **Staff respondent**

“Particularly my line manager who is a great example of how to treat others with dignity, fairness and respect. My wider colleagues also convey this in their day to day approach to their roles.” **Staff respondent**

As above, some staff respondents felt confident that they were delivering a fair and equal service without discrimination because they wanted to help people to get the benefits they are entitled to. This was part of the reason why they wanted to work for Social Security Scotland. Others spoke of meeting client's needs in terms of accessibility, additional requirements and communication (see below for more on this).

Dignity, fairness, respect.

“I encourage others to be open and fair and to not act in any way that could be interpreted as discriminatory. No one I've dealt with has ever acted in a way that could be so interpreted. Many staff are working here because they want to improve clients' situations, and to work in an environment that encourages them to do so.” **Staff respondent**

“Accessibility needs have been put at the forefront of the design of our systems.” **Staff respondent**

Formal measures, such as Equality Impact Assessments, had helped some staff respondents to feel confident that Social Security Scotland was delivering a service without discrimination. Others noted the work which has been done to design the service with those with lived experience of the benefits system.²

“Uptake of impact assessments and work within the equalities networks.” **Staff respondent**

“The effort and understanding that has gone in to considering different barriers faced by different clients.” **Staff respondent**

A minority of staff provided examples of when they felt Social Security Scotland did not live up to the values of dignity, fairness and respect. A few felt that recruitment practices favoured those with a certain education, background or who have particular skills. Though not specific instances of discrimination, these respondents described

² The design and delivery of Social Security Scotland's service is being shaped by people with lived experience of the current benefits system through the use of [Experience Panels](#) and [Client Panels](#).

such practices as ‘discriminatory’. This was one example in which respondents felt that staff needs were not treated in the same way as client needs.

“I am not sure that the recruitment method complies with the Charter. It penalises people who do not write in the ‘correct way’. The STARR system [Situation, Task, Action, Result, Reflection] is highly flawed. It does not make sense for a progressive government to use such a method. I feel a loss of confidence in the Charter when it feels like the staff are not protected in the same way our clients.”
Staff respondent

“Accessibility for staff needs to be far higher up the priority list. This is considered at every step for clients but we forget our own people every time, and I do mean every time. Accessibility for our own people is not being given the attention it deserves.” **Staff respondent**

Some respondents commented that ongoing training and awareness sessions would help them to feel more confident to work without discriminating against clients or colleagues. These respondents spoke generally about being kept up to date with the latest processes regarding equalities and gathering feedback from clients and staff. On more specific training needs, a few said they would appreciate further guidance and information on ethnic and cultural sensitivities, as well as on the translation processes for clients whose first language is not English (for more on this see the section below on access). A handful of respondents spoke of needing more support, leadership or training having witnessed problematic behaviours and/or instances of bullying and harassment.³ These examples referred to Social Security Scotland as an employer rather than delivering a service for clients.

³ The People Survey 2020 (an annual survey of all staff members across Civil Service departments in the UK) found that 6% of Social Security Scotland respondents had experienced bullying and harassment at work. The same percentage said they had been discriminated against at work.

“I abhor bullying and racism. Promoting staff that have been contacted on these subjects causes concern.” Staff respondent

“In meetings with behaviours not challenged - sometimes there is an acceptance that people can talk to each other in a horrible way.” Staff respondent

One staff respondent felt that the moderation on the Scottish Government intranet should involve firmer responses when comments were removed.

“Any form of discrimination should be explicitly unwelcome within the Scottish Government, whether it be transphobia, racism, or homophobia etc. It would make those of us affected by these incidents feel a lot safer and secure if the messaging was more direct.” Staff respondent

Clients find staff knowledgeable and approachable

The Charter Measurement Framework asks for “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.”

Examples of when staff were knowledgeable

Client interviewees were asked how knowledgeable they had found Social Security Scotland staff during their interactions. The majority of interviewees said that they found staff very knowledgeable and helpful. Most noted that staff had been able to answer their queries, and that they got the answers and information that they were looking for.

“The people I spoke to were amazing. They knew what I needed the answers for. And it was like, how did you know that much?” **Client interviewee**

“Just the knowledge of things and explaining things that I hadn’t thought about, like the Best Start [Foods] vouchers. The excellent customer service. They were polite when they answered the phone. With some companies they sound as if they don’t want to answer the call. The gentleman I spoke to was quite helpful. It didn’t sound like they didn’t want to answer the phone. He was very social security-minded. [...] He explained everything. The advice [was] just apply for it and he explained what the money was for. He didn’t make me feel as if I needed to call back to ask any more questions. He explained everything.” **Client interviewee**

Client interviewees noted that staff were knowledgeable of Social Security Scotland’s benefits and also offered them information that they did not ask for. They were able to tell them about other benefits they may have been entitled to or will be available through Social Security Scotland in the future.

“They were able to tell me to apply for Best Start Foods. I didn’t know anything about that and when I phoned someone was able to tell me I was eligible. [How were they at explaining things?] Brilliant. When I called I got the answers I needed.” **Client interviewee**

However, a couple of interviewees said they wanted more information about Social Security Scotland’s benefits or other support but were not offered this by staff.

Client interviewees also said staff were knowledgeable about systems and processes. Staff were able to make applications for them and tell them how long to expect each step to take or when letters and payments would arrive. Interviewees said that not only were staff knowledgeable about Social Security Scotland's service but that they explained information clearly and in a way that was easy to understand.

"They were really helpful. I felt like they wanted to help me. I felt they were [...] you know, that they could understand. I think you need to assume as a staff member that if people are dealing with benefits then they could have other issues. They could have additional support needs or something. I feel like some of those agencies don't understand that at all. So it would be great if more of them were like the people I spoke to [at Social Security Scotland]. They assumed that I might have troubles with it and that helped me to communicate with them. Because I'll say something in a certain way and they'll kind of rephrase it for me and that helps a lot." **Client interviewee**

For some interviewees, this general feeling that staff were knowledgeable, helpful and approachable put them at ease and reduced some of the anxieties they had about dealing with Social Security Scotland.

"They explained it really easily as well. At the time my anxiety would've been through the roof because I've never done anything like that before. In layman's terms, it was great. Everything was explained to me and I could understand it." **Client interviewee**

Only one client interviewee recalled a negative experience of interacting with Social Security Scotland staff. On this occasion the client was put through to a new member of staff who was not able to answer their questions or help with their query. They phoned back a second time but got the same member of staff who was still unable to help and who did not pass them onto another member of the team. Though the member of staff was apologetic and honest, this left the client feeling frustrated and the issue unresolved.

“They were fine, but I felt they were a bit embarrassed because they didn’t know what I was talking about. They did tell me that they were new. They had just started and they weren’t sure of everything yet. So I phoned back and unfortunately I got the same [person] again. [...] I think I was a bit confused because I knew more about it than they did and I didn’t know much. [...] They were very apologetic. It wasn’t their fault. They had obviously just started. They tried to look into it but they didn’t know what they were looking for. [...] They were honest that they didn’t know what was happening. [...] I wouldn’t say I was angry because it wasn’t their fault, more frustrated. Because I thought it was an easy question but obviously they didn’t know what it was.” **Client interviewee**

Decisions (of how they explained decisions well, examples of not understanding decisions, action taken)

Client interviewees were asked about their experiences of Social Security Scotland making decisions on their benefit applications. This included how staff or communications explained decisions and clients’ understanding of them. Most interviewees described straightforward decisions on their benefit or grant applications and felt they understood the decision. Some interviewees spoke about finding out or speaking to staff about the decision. In these examples, interviewees felt that staff explained decisions clearly and compassionately.

“They could tell me why I was rejected. I was like ‘I got the money last year though’. And they’re like ‘Yeah, we can see that but you applied too early this time.’ And I was like ‘oh I didn’t know that’. I think it’s just common sense when exactly you reapply but [I] didn’t think that.” **Client interviewee**

“Oh, the staff were fine. They told us we wouldn’t be getting anything because of the savings [we had]. The actual savings in my bank account. It was short and sweet. [...] I did [feel like I was listened to]. I suppose it’s just common procedure. They’re actually fine. They’re understanding and also they care about what you’re saying. But they just follow procedure and basically I wasn’t able to get anything.” **Client interviewee**

Most interviewees said they found out about a decision by letter. In most cases of clients receiving Carer's Allowance Supplement, the letter provided all the information they needed about the payment. The letter said why they were getting it and when payments would arrive.

"It was understandable. There was no problems with the communication. It was clear and effective. [...] I didn't need to ask for additional help. If the communication wasn't clear then I would have asked somebody or telephoned the department that sent the letter. As everything was clear and easy to understand there was basically no need to disturb anybody else." **Client interviewee**

"I got a letter through just before it was due to be paid. Maybe six weeks before it was due to be paid. It gave you the approximate date that it was due and said that you get a payment twice a year. You have to be getting Carer's Allowance from 13th October and then you get your payments in June and December. It was great having Christmas coming up. [...] That was the first time I'd heard [about it]. [...] The letter explained it quite well. It said that it was a one off payment as long as you were getting the Carer's Allowance. This was an additional benefit." **Client interviewee**

A few client interviewees said the decision or information they received was not clear and they did not fully understand it. One interviewee described being confused about a letter they received about a benefit decision because they had made multiple applications. The letter was not clear about which application it was about. The same interviewee said they received a payment for Scottish Child Payment but did not receive a letter or confirmation telling them that this would happen. Another interviewee said they were confused when they received a letter about Carer's Allowance Supplement. The client was felt unsure about why they were receiving the benefit and when.

“I was confused a little bit because I have friends in England and they don’t get it. Sometimes I refer to my friends about forms and we talk to each other about [these] things. And they were like ‘we don’t have that’. So I thought maybe it’s just a temporary thing that we get here because of COVID, it’s an additional thing or maybe it’s not. Maybe it’s a permanent thing. But I still to this day don’t really know. Which is shocking because I’ve looked into it. And I know we get it, but I keep forgetting we get it. There was something posted on [Social Security Scotland’s] Facebook the other day: ‘You’ll be getting this payment in June and then you get one in December.’ And I had totally forgotten about that. [...] But I don’t understand why they couldn’t have communicated it better. The letter kind of tells you what it’s about but not if it’s temporary or permanent. It doesn’t really tell you that.” **Client interviewee**

One client interviewee described different experiences of finding out about different benefit decisions. When they applied for Scottish Child Payment they were kept up to date with text messages and received a letter and text to say that they were successful. The letter and texts were clear. However, when the interviewee applied for Best Start Foods, they got a letter to say they were not eligible for Best Start Grant which they did not apply for. They then received a card for Best Start Foods card separate to this. They were confused about whether they could still apply for Best Start Grant when they did become eligible.

“[I didn’t get the benefit] because I wasn’t far along enough yet into my pregnancy. But it didn’t say that I could apply again when I got to that stage. And that’s what I was trying to find out: if I was rejected could I apply again.” **Client interviewee**

Interviewees talked about receiving a benefit payment before getting their decision letter. This issue was more common among those with Best Start Grant experience and some Carer’s Allowance Supplement recipients. Some felt it wasn’t a problem. Others said it was confusing and inconvenient. A handful had to contact Social Security Scotland to check the money was intended for them due to not receiving a decision letter at the time of payment.

Dignity, fairness, respect.

“It was a complete surprise. If I’d had a letter I would’ve known why the payment was in. It was more of a surprise because the payment came before I got the letter. So I had to phone up to say ‘Look, can you advise?’ I kind of knew what it was for, but I wanted to double check. I didn’t want to spend it on a pram if it wasn’t actually meant to go in [my account].” **Client interviewee**

Challenging decisions, re-determinations, appeals (examples of clients feeling able to challenge, examples of why clients felt unable to challenge, action taken)

Client interviewees were asked about challenging decisions made on their benefit applications, and their experiences of re-determinations and appeals. Some interviewees spoke of feeling unable to challenge decisions. One interviewee for example, felt that their payment for Funeral Support Payment had been calculated incorrectly. They did not feel able to challenge the decision because they were going through a bereavement and were grateful and relieved to be getting any payment.

“That was a worry for me. I calculated the Funeral Grant I received, and I should have gotten more help. I wasn’t angry but relieved when I got the help. [So you didn’t receive an explanation as to why you got less?] At that point I was just relieved that the payment came through.” **Client interviewee**

One client interviewee felt able to challenge their decision. They talked about asking to have their Best Start Grant School Age Payment decision looked at again after their re-determination. The interviewee described the experience as stressful and said they did not know what to expect from this process.

“I spoke to people that said that I ... I can’t remember... that there would be a judge or something [...] I don’t actually think I got any information from [Social Security] Scotland. I think it was like ‘you can have a tribunal if you like’, but I don’t think it was how we would have a tribunal. [...] After that I just left it, I didn’t really see there was any point because I got everything across that I wanted to before the tribunal anyway. So I wish they’d told me how it would’ve went, if not for me then for other people who have to apply through third parties.” **Client interviewee**

See the section below on re-determinations for reasons for re-determinations and changing or upholding decisions, along with examples of the process.

Staff knowledge and training

The Charter Measurement Framework asks for “Examples of knowledge (including knowledge of how not to discriminate) and training AND examples of more support needed by staff AND Social Security Scotland action taken.”

Staff respondents from the People Panel who took part in the survey were asked to rate their knowledge about the social security system in Scotland (Table 1.4).

Table 1.4: How would you rate your knowledge of the social security system in Scotland?

(n=92) Column percentages

Response options	All respondents (n=92)
Very good	32%
Good	49%
Neither good nor poor	15%
Poor	3%
Very poor	1%

Most (80 per cent) rated their knowledge of the social security system in Scotland as 'good' or 'very good'. Few (4 per cent) rated their knowledge as 'poor' or 'very poor'.

Although not a Charter Measurement Framework measure, we also asked if staff felt they knew enough about what Social Security Scotland does to explain it to others. Results from this question are shown in Table 1.5.

Table 1.5: How much do you agree or disagree with the following...I know enough about what Social Security Scotland does to explain it clearly to others

(n=92) Column percentages

Response options	All respondents (n=92)
Strongly agree	46%
Agree	45%
Neither agree nor disagree	8%
Disagree	1%
Strongly disagree	1%

Almost all (90 per cent) said they knew enough about Social Security Scotland to be able to explain it clearly to others. Only 2 per cent thought that they didn't have enough knowledge to do this.

53 staff respondents said they either currently interact with clients as part of their job (43 respondents) or will do so in future (10 respondents). All 53 respondents were asked how much they agreed with four statements about their job knowledge (Table 1.6). Please note the low numbers in this table, percentages are given only to illustrate the range of views.

Table 1.6: How much do you agree or disagree with the following...
(n=53) Current and future client facing staff, Row percentages

How much do you agree or disagree with the following...	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree
I know about a range of advice and advocacy services that are convenient for clients	74%	13%	13%
I know how to refer clients to advice and advocacy services	60%	19%	21%
I know enough about the re-determinations process to explain it clearly to clients	57%	15%	28%
I know enough about the appeals process to explain it clearly to clients	47%	15%	38%

Around three quarters (74 per cent) agreed or strongly agreed that they knew about a range of advice and advocacy services for clients. Over half (60 per cent) said they knew how to refer clients to those services. Around one in five (21 per cent) said they didn't know how to do this.

Over half (57 per cent) of respondents who currently work with clients, or will do so in future, said they knew enough about the re-determinations process to be able to explain it clearly to clients. More than a quarter (28 per cent) said they didn't know enough about the re-determinations process to do this.

Just less than half (47 per cent) agreed or strongly agreed that they knew enough about the appeals process to explain it to clients. Just less than two fifths (38 per cent) said they didn't know enough about the process.

There were some differences between staff respondents based on job grade. Staff respondents in A-band roles were more likely to disagree or strongly disagree with the statements about job knowledge compared to those in B-band roles.

Staff that currently have regular contact with clients were asked to rate their confidence in their job knowledge and skills (Table 1.7). This only included respondents who currently interact with clients (43 respondents).

Table 1.7: In the past year, how confident have you felt in your knowledge and skills to support clients?
(n=43) Column percentages

Response options	All respondents (n=43)
Very confident	26%
Confident	65%
Not confident	9%
Not at all confident	0%

Almost all (91 per cent) said they felt confident or very confident in their knowledge and skills to support clients. Around one in ten (9 per cent) said they weren't confident in their knowledge and skills.

Staff respondents were asked what helped them to feel knowledgeable when supporting clients. Many respondents mentioned the training they had received, ongoing learning and the availability of guidance. Some mentioned that their experience, both in their role within Social Security Scotland and from previous employment, had helped them feel confident. Many also mentioned the support available from managers and colleagues.

“Extensive preliminary training, some degree of continuing training, and some degree of daily/ground level live support.” **Staff respondent**

“I feel there are enough resources to find what you need and colleagues and team managers are very forthcoming if there is something unclear.” **Staff respondent**

To help them feel more confident in their knowledge, a number of staff respondents who engage with clients said there should be improvements to the guidance system. Comments said the guidance was incomplete, out-of-date or difficult to navigate.

“Clearer and correct guidance. There are a number of issues with the guidance articles which we refer to being unclear, non-existent or incorrect. Having a definitive, clear and correct set of guidance articles would help immeasurably.” **Staff respondent**

“Better/clearer guidance. In terms of other services available to clients, anything I know of is from my own research. While there are often mentions in training of signposting, we have never actually been told where to signpost clients to.” **Staff respondent**

“An easier system to find information. The current guidance is difficult to navigate and confusing. It also does not help when guidance changes on a daily basis.” **Staff respondent**

Staff who work in other areas of the organisation that don't engage directly with clients were also asked to rate their job knowledge and skills. This included staff who never engage with clients as well as those who do not currently engage with clients but will in future. Results from this question are shown in Table 1.8.

Table 1.8: In the past year, how confident have you felt in your knowledge and skills to do your job?
(n=48) Column percentages

Response options	All respondents (n=48)
Very confident	38%
Confident	54%
Not confident	6%
Not at all confident	2%

Almost all (92 per cent) said they felt confident or very confident about their job knowledge and skills. A small number (2 per cent) of staff said they felt not at all confident.

These staff respondents said that their experience and expertise made them feel confident in their job. Some also mentioned gaining confidence through experience and training for their current role. Some respondents noted the benefits of receiving positive feedback on their performance. Lastly, these staff also mentioned support from managers and colleagues.

“Previous experience in my field and the support of my colleagues.” **Staff respondent**

“Time spent in this role has helped me to build up my knowledge and skills. Support from colleagues and knowing where to seek advice and guidance when required.” **Staff respondent**

Respondents who took part in the staff survey were asked if they had needed more support relating to issues of equality and discrimination (Table 1.9).

Table 1.9: Have there been any times in the past year where you felt you needed more support, leadership or training on equality and discrimination?

(n=91) Column percentages

Response options	All respondents (n=91)
No	84%
Yes	16%

Most (84 per cent) said that they hadn't needed more support, leadership or training about equality and discrimination during the last year. Some staff respondents said they had needed more support and there was a difference between staff at different grades. A quarter (25 per cent) of staff respondents in C-band roles said they needed more, compared to 17 per cent of those in B-band and 12 per cent of those in A-band (though it should be noted that the number of C-band staff responding was low).

Staff respondents mentioned a range of training and support activities they had taken part in since joining Social Security Scotland. These activities were delivered in different ways. These included online learning courses; self-directed learning; support from colleagues and managers; demonstrations; and seminars.

"Facilitated training, eLearning, manager-guided individual project work. Day training courses, 1:1 demonstrations." **Staff respondent**

“I have completed various eLearning, attended seminars and used the resources available on [the intranet] to obtain information to help me do my job more effectively.” **Staff respondent**

Some activities were formal training provided by Social Security Scotland. These activities covered things such as understanding benefits and how to use Social Security Scotland IT systems. Staff who interact with and help clients explained that this training takes place as an initial period of benefit-specific learning followed by a period of consolidation. Some also mentioned ongoing training to keep their skills up-to-date.

“Initial training. Excellent consolidation training. Manager training and support.” **Staff respondent**

“I have received the initial company 4-week training followed by consolidation. Both very thorough and informative. I have since been on various upskilling sessions that were also thorough and very helpful in fully understanding all aspects of my role.” **Staff respondent**

Staff respondents also mentioned other examples of formal training delivered by teams within Social Security Scotland. These included training on topics like: how to communicate in an inclusive way; how to successfully manage other staff; and understanding diversity and discrimination. Some mentioned training on how to use tools for work like Microsoft Teams and Trello. Others mentioned mandatory training in security best practices and health and safety.

“HR support, health and safety sessions, working from home sessions, inclusive communication sessions, how to manage risks sessions, Woman in Leadership, collaborative working using IT software (Miro/Yammer/Trello), lesson learnt sessions, Equality Impact Assessment awareness sessions.” **Staff respondent**

“Coaching, mentoring, eLearning like inclusive communication and emotional intelligence. The intelligent kindness sessions were excellent.” **Staff respondent**

Some staff respondents also mentioned training in understanding Our Charter and applying its principles to their work.

“The training session that I attended when I joined Social Security Scotland which focused on Our Charter was very useful. I feel that as we are building services from scratch that we have the freedom to incorporate it into service designs.” **Staff respondent**

“It was the Charter that attracted me to apply to work within Social Security Scotland. Participation in networks and the training given on the Charter has been helpful.” **Staff respondent**

Some respondents also said Social Security Scotland had supported them to receive training or development delivered by other organisations. There were also a few comments which mentioned support with certified training. These included Modern Apprenticeships and professional HR qualifications.

“I have been encouraged to upgrade my Chartered Institute of Personnel and Development membership to Chartered level. I have access to various networks to keep my knowledge and skills up to date.” **Staff respondent**

“I am currently doing a Modern Apprenticeship so I have had lots of training on stuff that will help me carry out the tasks that my job role expects me to complete.” **Staff respondent**

Some staff respondents said the training they had received had made them feel confident in their roles. Some also mentioned more informal training and support activities that they had found useful. Many highlighted the support they had received from colleagues and line managers. Others mentioned things like job shadowing, having access to guidance, their previous training, and receiving regular updates helped them feel knowledgeable and confident.

“On-going line management support - regular 1-2-1's, meetings, emails and Teams calls to ensure I am aware of my responsibilities. Reaching the Key Work Objectives and getting booked onto mandatory and supplementary training and accessing the right systems to access guidance - such as the Knowledge Hub etc.” **Staff respondent**

“Have access to guidance for telephony, chat and letters. Also did the eLearning on contacting clients. Get regular emails with updates on dealing with clients on the phone and chat. My manager also arranges team meetings to inform us of any new developments and goes over things sharing screens. Also had training initially in the office.” **Staff respondent**

A couple of staff respondents said they had limited or no training for their role. Some other comments said that the training they had received had been inadequate.

“I've received no guidance or training for my role. I've received support from some colleagues that I work with.” **Staff respondent**

“Training has been limited. Lack of practice sessions. Independent sessions e.g. eLearning then not discussed with the facilitator or practical sessions to check understanding. Blended learning is fine but it needs to merge well together to allow trainees to really understand.” **Staff respondent**

“I received very general training in the first weeks but nothing that felt specific to our clients, and very little training on telephony (someone in my team explained how to do outbound calls) and web chat.” **Staff respondent**

In their comments, some staff respondents highlighted a lack of training or support when they first joined Social Security Scotland or moved into their role. They mentioned it would be helpful to have training and induction materials to understand how Social Security Scotland operates. A couple of comments also mentioned further training and support for staff who interact with clients and are new to their role.

“I’ve not had very much [training or guidance]. I feel at a loss to my duties. I feel I’m getting training a bit late and if I had had it at the beginning I would feel much more positive and confident in my job.” **Staff respondent**

“Arriving in to a senior position there’s an implicit expectation that you hit the ground running. However, orienting yourself around a large organisation and connecting with people is so much harder when working in a virtual environment. There could be more done in corporate areas in terms of induction - simple things like organisational charts, how to navigate the intranet and who’s who material would be really helpful.” **Staff respondent**

“More support on calls [with clients] – being able to speak [to clients] with support. Having a buddy to support for first week of being on calls – being able to listen into live calls before taking calls.” **Staff respondent**

Other staff respondents had ideas for improvements to the training and support provided by Social Security Scotland. Examples included:

- more training on how to communicate in an inclusive way
- understanding what different teams do
- further training on Our Charter
- managing change; and
- understanding discrimination and bias.

Some comments also mentioned expanded training for different job roles and grades.

“Although I have awareness of what it is, I would like to receive training on how best to communicate inclusively to as wide an audience as possible.” **Staff respondent**

“Loads of personal learning available albeit in many cases eLearning. I have loads of opportunities to engage with people around health and wellbeing opportunities. Limited face to face training and I would like to see more of this aimed at leaders and managers in Social Security Scotland as most of the focus is on Client Adviser level jobs/roles.” **Staff respondent**

“Learning and development training needs to expand to cover more training needs at each grade.” **Staff respondent**

Support for staff

The Charter Measurement Framework asks for “Examples of good support for staff and staff confidence AND examples of any additional staff needs, and why those who do, lack confidence AND Social Security Scotland action taken.”

Staff respondents were asked about how supported they had felt overall during the last year (Table 1.10). Each respondent also rated the support they had received from their line manager (Table 1.11).

Table 1.10: In the past year, how supported have you felt at work overall?
(n=92) Column percentages

Response options	All respondents (n=92)
Very supported	60%
Supported	39%
Not supported	0%
Not at all supported	1%

Table 1.11: Thinking about the past year, how would you rate the support you’ve had from your line manager?
(n=92) Column percentages

Response options	All respondents (n=92)
Very good	73%
Good	23%
Neither good nor poor	3%
Poor	0%
Very poor	1%

Almost all staff respondents (99 per cent) said they had felt supported or very supported at work during the last year. Similarly, almost all (96 per cent) said they had good or very good support from their line manager.

Staff respondents were asked to give details about the types of support they had received. Many comments referred to the different challenges resulting from the COVID-19 pandemic. These included work-related challenges, such as working from home, and personal matters, such as issues relating to health and wellbeing.

Many comments referred to a culture of support within Social Security Scotland. Comments said support was readily available and often given with kindness and a care for wellbeing.

“A culture of genuine care is evident across my department.” **Staff respondent**

“If I have had any issues I have been made to feel comfortable in knowing I can approach someone and they will try to help if they can.” **Staff respondent**

In their comments, many staff respondents particularly highlighted support from managers. Some said they felt comfortable asking for help and that managers provided timely support when needed. Others said their managers had showed concern for wellbeing and been understanding when it came to personal circumstances affected by the pandemic.

“My line manager has responded to Skype/Teams messages and emails very promptly – being patient and empathetic.” **Staff respondent**

“A very collegiate atmosphere in my direct team, and great help from my direct managers, who really value my work-life balance and encourage me to take time away for exercise and relaxation.” **Staff respondent**

Others highlighted how support from colleagues, both for work issues and personal wellbeing, had been very important to them. Examples of this type of support included: keeping in touch, helping with work-related questions, and monitoring wellbeing.

“I can be honest and open with my line manager and colleagues around me. People have reached out when they felt I was maybe not ok, or just not my usual self.” **Staff respondent**

“I have regular contact with my colleagues - some on a daily basis. We have taken time not only to speak about work but to have regular chats about things in general. My team have also set up coffee mornings, quizzes, social gatherings etc. which have been a huge help during the period of lockdown.” **Staff respondent**

Some staff respondents said that frequent communication during the last year had helped them feel supported. Comments mentioned communication within teams and from managers, as well as organisation-wide messages and updates.

“Lots of check-ins by my manager, regular team meetings and informal chats. Monthly one to ones where all aspects of work can be discussed. Also fika⁴ chats and the focus on wellbeing has made a difference.” **Staff respondent**

⁴ (in Swedish custom) a break from activity during which people drink coffee, eat cakes or other light snacks, and relax with others.

“I joined Social Security Scotland shortly after the first lockdown was imposed. I was immediately welcomed by my team manager and invited to all-colleague conference calls. I had contact with my team leader every day who asked about my mental wellbeing and made sure I had all the equipment I needed to do my job.” **Staff respondent**

Staff respondents were asked if anything could have been done to help them feel more supported. Many said they were happy with the support they had received and couldn't think of anything else that could have been put in place. Some respondents mentioned issues related to training which have been covered above. Some respondents said that managers could have provided further support. Others mentioned issues about workload and an expectation to work long hours. A couple of comments mentioned a need for better communication about what is happening in Social Security Scotland and in the Scottish Government.

“The lack of action with long hours culture and how immediate responses need to be. The level of expectation has increased for you to be available long past what would have been normal working hours and this is being allowed to grow.” **Staff respondent**

“Some changes/deadlines are communicated at very short notice when it is clear that they had been in the planning for a long time. It would be nice to have better sight of timelines so we can plan and signpost staff accordingly.” **Staff respondent**

Staff respondents said if they had, in the last year, had any additional needs or requirements at work (Table 1.12).

Table 1.12: In the past year, have you had any additional needs or requirements at work?

(n=92) Column percentages

Response options	All respondents (n=92)
No	62%
Yes	38%

Just less than two fifths (38 per cent) of staff respondents said they had additional needs or requirements during the last year. There were some differences between respondents from different groups. Around two thirds of those with a physical or mental health condition said they had additional needs. This is compared to around a quarter of those who don't have a condition. Staff in C-band roles were less likely to say they had additional needs compared to those in A and B-band roles. Staff respondents who work full time were more likely than those who work part time to say they had experienced additional needs or requirements.

Staff respondents who said they had experienced additional needs or requirements were asked if they told anyone about these (Table 1.13).

Table 1.13: Did you tell anyone about your needs or requirements?

(n=35) Column percentages

Response options	All respondents (n=35)
Yes	91%
No	9%

Almost all (91 per cent) of those who had additional needs in the past year, told someone about these needs. Staff respondents described needs which can be grouped into three main categories: equipment to aid working from home; needs related to caring responsibilities; and needs related to health and wellbeing.

Many staff respondents said they had needed additional equipment to allow them to carry out their duties while working from home. Examples included: desks; chairs; and monitors.

“I felt that I needed a monitor to make work easier. I asked my line manager and it was sorted and delivered to my house within a couple of weeks.” **Staff respondent**

“I required a chair for my back (I used to work outdoors so am not used to sitting for long periods) as what I had was causing me a lot of pain.” **Staff respondent**

A number of staff respondents also mentioned that they had raised additional needs or requirements relating to caring responsibilities. Some respondents mentioned taking care of children and providing home-schooling. A couple of respondents also mentioned caring for relatives, such as parents. Respondents were positive about the support they had received to accommodate these needs.

“I have two young children. This impacted me and my availability for work greatly. I required adjustments to my working pattern and every request was fully accommodated.” **Staff respondent**

Some respondents said they had discussed health and wellbeing needs, usually with their manager. Respondents mentioned a range of support including; a change to their duties or working hours; medical leave; and support services such as Occupational Health and counselling.

“I have been grateful to have reasonable adjustments. I suffer from a chronic condition which can be exacerbated by sitting at the screen for too long. I am grateful that I have been able to work flexibly and take frequent breaks since the nature of my job has changed since being home based.” **Staff respondent**

Two staff respondents said it was a personal choice not to tell anyone about their needs, preferring to keep this private. One mentioned that they understood support would have been provided had they discussed their needs. One staff respondent said working from home had made them feel isolated. They felt unable to talk about their worries and needs given the difficulties experienced by everyone over the last year.

“It was general ups and downs of home working. I'm quite a reserved person so didn't really want to burden someone with my issues, although I fully understand there would have been support there if I'd asked.” **Staff respondent**

“I felt isolated working from home and unable to voice my worries and needs, mainly due to feeling like everyone is struggling so why should I be special or different or unable to cope.” **Staff respondent**

Staff respondents said whether they would speak up if they saw a problem (Table 1.14).

Table 1.14: How much do you agree or disagree with the following...: I would speak up if I saw something that wasn't working, or something I thought was wrong, in Social Security Scotland
(n=92) Column percentages

Response options	All respondents (n=92)
Strongly agree	68%
Agree	29%
Neither agree nor disagree	2%
Disagree	0%
Strongly disagree	0%

Almost all (98 per cent) agreed or strongly agreed that they would speak up if they saw something wasn't working or if they thought something was wrong.

Table 1.15 shows how supported staff respondents felt to communicate at work in a way that was inclusive of their needs.

Table 1.15: In the past year, how supported have you felt to communicate with colleagues in a way that feels inclusive of your needs?
(n=91) Column percentages

Response options	All respondents (n=91)
Very supported	60%
Supported	32%
Not supported	8%
Not at all supported	0%

Almost all (92%) said they felt supported or very supported to communicate with colleagues in a way that felt inclusive of their needs. Fewer men than women said they did not feel supported, though this did involve low numbers of respondents.

Staff who work directly with clients were asked if they felt empowered to help clients effectively (Table 1.16).

Table 1.16: How much do you agree or disagree with this statement: I feel empowered to help clients effectively as part of my job
(n=43) Column percentages

Response options	All respondents (n=43)
Strongly agree	44%
Agree	44%
Neither agree nor disagree	7%
Disagree	5%
Strongly disagree	0%

Around four in five respondents (88 per cent) said that they agreed or strongly agreed they were empowered to help clients effectively. A few respondents (5 per cent) said they didn't feel this way.

Staff respondents who support clients were asked about what has helped them to feel empowered to help clients. Some respondents said they felt empowered to help clients with support from colleagues and management. They talked of relying on colleagues to help when dealing with difficult situations or for providing additional information. For others, training was essential to their feeling empowered.

“Access to colleagues who can provide information or assist clients directly.”
Staff respondent

“The training I received when I started and the support I get from colleagues and bosses makes me feel confident to deal with anything.” **Staff respondent**

Respondents talked about feeling empowered through their fundamental desire to help clients, and being guided by the values in Our Charter to do so. These respondents spoke of making a difference to client’s lives and contributing to the bigger picture of reducing poverty in Scotland. For some, the direct contact and interaction with clients empowered them, while for others having some autonomy and flexibility over the application and decision-making process empowered them to help clients get the appropriate outcome.

“It feels good to help someone. And guide them to services that may help them where we cannot.” **Staff respondent**

“The organisation is continually reminding us how important our role is and the difference we are making to peoples’ lives. Lets us know we are doing a great job and enriching peoples’ lives. Here to help/support people. Follow core values when dealing with every client.” **Staff respondent**

“The ability to make decisions and work with clients to get the right outcome for them.” **Staff respondent**

“Not having to stick to strict timescales, being empathetic that clients have busy and sometimes stressful lives so getting the evidence needed may take a while.” **Staff respondent**

The same staff respondents were asked what would help them to feel more empowered to help clients. Respondents raised themes such as ongoing staff training, clearer advice on signposting to external organisations and better ways to share information internally and externally. Other responses included improving IT systems, returning to office working following the COVID-19 pandemic shift to home working, and use of email for communications to clients.

“A computer system that was stable and didn't have new and interesting errors every few weeks. The instability of [the system] and the constantly changing guidance and workarounds for problems is probably the biggest obstacle to effectively helping clients.” **Staff respondent**

“A bank of other agencies we can refer people to.” **Staff respondent**

“It would be easier if everyone was in the office so we could learn more by listening to how others deal with clients and issues.” **Staff respondent**

2. Processes that work

Processes work well

This section presents findings on the re-determinations process and how Social Security Scotland's partner organisations think the service is working.

Re-determinations and Appeals

The Charter Measurement Framework asks for “Examples of reasons for re-determination and why or why not decision was changed, examples of re-determination process from client and staff points of view”.

It also asks for “Examples of reasons for appeals and why or why not upheld, examples of appeals process for positive and negative (if any) outcomes AND Social Security Scotland action taken”. Evidence on appeals is not included in this research. The low volume of appeals in 2020-21 meant that clients could have been unintentionally identified in examples. Evidence on appeals will be revisited in future when the volume of appeals has increased.

Client Experience staff participants were asked about the re-determinations and internal reviews process. This included the reasons why clients had asked for their decision to be looked at again and reasons why decisions were upheld or changed. Client Experience staff participants were also asked how they felt the process had been working for both staff members and clients.

Client Experience staff participants were asked how they felt the re-determinations process had been working overall. Participants thought the process had been reasonably smooth and efficient from an operational perspective. They felt that this was evidenced by the target turnaround time of 16 days having been met for the majority of re-determinations. However, they said internal systems, such as those used to manage client cases, sometimes made the process more complicated for staff.

“From a staff point of view, the processing of re-determinations is not always a bed of roses with [the internal system] and the processes we have in place are not the simplest sometimes. But as far as putting them through and getting them done, there’s very few that we have missed the target of 16 days on.” **Client Experience staff participant**

Although they noted the importance of meeting the target turnaround time, Client Experience staff participants also spoke of the detailed and comprehensive nature of the re-determinations process. They thought it was important to take the time to look into the client’s application in depth when making a new decision. Part of this has included checking the client’s eligibility for other Social Security Scotland benefits when new evidence emerges during a re-determination. Participants felt that this was a positive part of the process that could serve to help clients.

“As part of the re-determination process we’re also looking at other things...we tend to look at the client’s whole journey. It’s not just necessarily the re-determination in isolation....We do look at everything as a whole, especially things to do with evidence and eligibility for other grants. And then clients are over the moon when they find out they’re entitled to something else as a result of submitting more evidence for their re-determination.” **Client Experience staff participant**

Client Experience staff participants highlighted that the re-determinations process has been designed to make things simple and straightforward for clients. They mentioned that in every denial case the client receives a re-determination form with their decision letter. This is intended to simplify the process for the client and to encourage them to ask for their decision to be looked at again if they don’t agree with it.

“We do encourage clients to ask for a re-determination if they want one or to give feedback and complaints. We actively want these things. It’s not a conflict situation when a client asks for a re-determination.” **Client Experience staff participant**

However, one participant mentioned that sending the re-determination form with the decision letter can occasionally cause confusion. Some clients believe the form is mandatory and complete it even if they agree with the decision.

“We send the re-determinations form with every decision that is made so that the form is there for the client. So they don’t have to go looking for it and it’s there. That can be a double-edged sword because sometimes you send them the form and they think they’ve got to fill it in. We’ve had a few clients who have filled in the form because they got it with the letter but they’re actually quite happy with the decision.” **Client Experience staff participant**

Participants noted communication and accessibility as key factors that have helped to make the process as simple and straightforward as possible for the client. Across the re-determination examples given by Client Experience staff participants, each case involved feeding the outcome back to the client over the phone. They felt that being able to deliver the outcome to the client over the phone helped make the service more courteous and personal.

“In terms of passing outcomes back to clients, in Client Experience we’re quite privileged because we have time to be able to communicate with clients. So it’s really on a one to one basis. We send letters out to give them a decision but depending on the circumstances we can also phone them about their decision as well as sending a letter. We might also do an additional phone call just depending on whether you’ve spoken to a client and how the conversation has gone. If they were distressed about a payment, for example, or concerned. Rather than them just getting a letter we often phone the client as well to give them the decision as soon as it’s been made.” **Client Experience staff participant**

Participants also reported trying to make the process as accessible as possible for clients. For example, they explained clients can request a re-determination over telephone rather than the paper form if preferable. One respondent mentioned that online communication options were not yet available for re-determinations but were in development for future use.

“Clients can phone up and get a re-determination [or internal review] taken over the phone. So it’s not only a paper exercise. I think shortly they’ll be able to do it via a digital portal although that’s not there yet. So the accessibility of asking for a re-determination is there.” **Client Experience staff participant**

Client Experience staff participants were asked about the reasons why clients wanted their decision to be looked at again. Participants said the reasons differed by benefit type. Best Start Grant and Foods clients often wanted their decision to be looked at again in cases where they applied outside of the application window. For example, some clients had applied for Best Start Pregnancy and Baby Payment too early in the pregnancy. Others were confused by Best Start Grant and Foods being combined in one application and asked for a re-determination where part of the application was denied. In these cases, Client Experience staff participants said that decisions were upheld but the majority of these clients were happy to be told to make another application within the right timeframe.

Some Best Start clients wanted their decision to be reviewed in cases where their application had been denied based on lack of evidence that they were the main carer of the child. Other reasons for Best Start re-determinations included clients being over the income threshold at the point of application due to a one-off financial situation, such as being mistakenly paid twice by their employer.

“For Best Start Foods, clients were over the threshold income when they applied and it turns out that sometimes they’re not [over the threshold]. It’s been a redundancy payment that has been taken off them again or they’ve been paid twice by their employer and it’s been taken back from them.” **Client Experience staff participant**

Reasons for wanting a Funeral Support Payment decision to be revisited included the client not meeting the eligibility criteria as the closest relative of the deceased or having applied for ineligible types of funeral costs. Clients have also requested a re-determination where they felt the payment was too low in comparison to the total cost of the funeral. Others challenged the decision where a denial had been made on the basis that other funds were already in place to help pay funeral costs.

“Clients will say things like ‘You’ve given me £3000 but the funeral cost £6000’. Or the request could be relating to costs that we don’t cover like flowers or a memorial stone. Things like that, that are outwith what we can help them to pay for. So clients will come back after a decision and say ‘I’ve incurred far more costs than what you’re willing to pay so I’d like you to look at the decision again.’” **Client Experience staff participant**

Client Experience staff participants also mentioned reasons for re-determinations around Job Start Payment. A common reason was clients not stating their care-leaver status in the initial application and not realising that this would help to clarify their eligibility for the benefit. Other reasons included the client not being out of work for 6 months at the time of the job offer, or looking like they had an income on paper due to a one-off financial situation.

“For Job Start Payment the application might be denied because we can see that they have an income. So it looks like they’ve been in work although they’ve asked for a re-determination because that income has actually come from a holiday payment, for example. So clients have asked for a re-determination because they were actually out of work.” **Client Experience staff participant**

Client Experience staff participants noted that re-determinations are often withdrawn by the client before Social Security Scotland has a chance to complete a review. They cited clients having made more than one application for the same benefit as one of the main reasons for withdrawing a re-determination.

“I think it’s worth saying that we get quite a number of re-determinations that are made and then withdrawn. Clients have applied for a re-determination and then realised it wasn’t appropriate because they’d made more than one application and quite frequently we have to phone them and say ‘did you really want the re-determination because we noticed you’ve put in another application and you’ve been paid for it’. So quite a number of the re-determinations are actually withdrawn.” **Client Experience staff participant**

Client Experience staff participants were asked about the reasons for upholding decisions following a re-determination or internal review. A common reason was clients not meeting the eligibility criteria for the benefit. Decisions were also upheld in cases where a client had applied outside of the application window.

Client Experience staff participants were also asked about the reasons for changing a decision after a re-determination or internal review. These included cases where staff had overlooked an evidence attachment; where there had been a misunderstanding about a client’s financial situation; and where clients started to receive qualifying benefits soon after submitting their application thus becoming eligible for the payment. For example, some clients had their initial application denied due to being ineligible without the qualifying benefit. However, the decision has been changed in cases where a client requests a re-determination and can evidence that they have been approved for the qualifying benefit since making the initial application.

“Usually it’s down to a backdated award. So they’ve applied for the qualifying benefit but they just haven’t received it at the time of the application.” **Client Experience staff participant**

In another example, Client Experience staff participants said a decision had been changed due to a misunderstanding about the existing funds of a Funeral Support Payment client. The application was initially denied as it appeared funds had been left by the deceased to pay for the funeral. However, the client asked for a re-determination and it became clear that the client's financial circumstances had been misunderstood when the initial decision was made.

"We established that there were in fact no funds left by the deceased to pay for the funeral. The client was left on low income and was very distressed about the whole thing. We established that they were indeed the closest relative but never had the funds personally available to pay for the funeral. On those grounds we were able to award payment towards the costs of the funeral after the re-determination." **Client Experience staff participant**

How the service is working

The Charter Measurement Frameworks asks for "Positive AND negative (if any) feedback from organisations who work with client groups on how they think the service is working AND Social Security Scotland action taken".

Partner organisation respondents were asked a series of questions about Social Security Scotland's service. Most respondents were positive about the service in general, with ten out of twelve rating the service as being good or very good. Respondents were asked to make further comments about what Social Security Scotland had done well when delivering the service. They noted Social Security Scotland's benefit application process, describing it as being quick and easy.

"Easy literature and easy claiming process" **Partner organisation respondent**

“Processing applications timeously” **Partner organisation respondent**

Other partner respondents felt that Social Security Scotland had done well in providing up to date, accessible information to both potential clients and partner organisations about the service. This was particularly in relation to the roll out of new benefits.

“Providing clear and accessible information on benefits to potential claimants and working well with organisations and stakeholders to update on progress of benefit rollout.” **Partner organisation respondent**

“They have kept agencies up to date with launch dates and information resources, attending a number of forums, sending out information directly and engaging in agency specific updates as required.” **Partner organisation respondent**

The remaining respondents commented that they thought Social Security Scotland had done well by putting the principles of dignity, fairness and respect into the service, as felt through interactions with clients and partners.

“I like the fact that Social Security Scotland is putting clients at the heart of things.” **Partner organisation respondent**

“Dignity, fairness and respect and thoughtful engagement with key partners.” **Partner organisation respondent**

“In terms of feedback from service users that we are in touch with, the service has been efficient and polite.” **Partner organisation respondent**

Respondents were then asked to make comments about what Social Security Scotland could have done better when delivering the service. Of seven responses, a few partners said that Social Security Scotland could improve advertising and raise awareness of the benefits and service they provide. This was to improve uptake among potential clients.

“More advertising of the benefits available as not all clients are aware.” **Partner organisation respondent**

“Better circulation of their publications including third sector organisation websites and places like Mumsnet.” **Partner organisation respondent**

Other respondents commented on the need to speed up the service delivery, by rolling out all disability benefits.

“You need to start delivering Personal Independence Payment (or your alternative to it). The delay in moving this from the Department for Work and Pensions and delivering a more user friendly service that has been promised should have been a priority.” **Partner organisation respondent**

One respondent felt that Social Security Scotland lacked presence in the Highlands and other rural areas.

“Highlands is a much larger geographical area and is hugely under-represented by Social Security Scotland.” **Partner organisation respondent**

Partner respondents were asked if they had ever supported clients to apply for Social Security Scotland benefits. Eleven respondents stated that they had, and were asked a series of more specific questions about their experience of this. Of those eleven, nine said that looking up or making contact with Social Security Scotland with or for clients was easy or very easy (Table 2.1). Ten respondents rated going through the application process with or for clients as easy or very easy.

Table 2.1: Partner organisation respondent views on service for clients⁵
All respondents (n=11)

How easy or difficult have you found...:	Very easy or easy	Neither easy nor difficult	Difficult or very difficult	Don't know
Looking up or making contact with Social Security Scotland with or for clients	9	0	2	0
Going through the application process with or for clients	10	1	0	0

⁵ Numbers are used rather than percentages because of the low number of respondents.

Services are accessible

The Charter Measurement Framework asks for “Examples of positive AND negative (if any) experiences of accessibility (how clients were enabled) AND Social Security Scotland action taken.”

Staff respondents and client interviewees were asked questions about their experiences of accessibility with Social Security Scotland. By accessible, we mean that clients are able to use the service where, when and how they choose and that all parts of the service are easy to use by everyone. Accessibility also encompasses inclusive communication, meaning that as many people as possible understand what Social Security Scotland does and can communicate and access the service in the way they want to. Within this theme, interviewees mostly spoke about communicating with staff or receiving communications. For example, some interviewees talked about getting a letter from Social Security Scotland as being a positive experience because it was easy for them to understand. They described the language and layout as simple and straightforward. One interviewee spoke of the way in which his communications had been tailored to meet particular accessibility needs.

“In comparison to correspondence I’ve had from, say, Her Majesty’s Revenue and Customs and things that are outwith Scotland, where you get a letter and you read the letter and you don’t really understand where the stuff has come from and you end up having to make a phone call off the back of it because you don’t understand it. Whereas all the stuff from Social Security Scotland is different. Everything is explained really clearly and it’s... it’s just plain language but also they’re explaining why they’re doing something and here’s [what to do] if you have questions, but you never do. I think it’s just a more modern approach to communication even though it’s a huge big organisation, but it doesn’t come across as one compared to the likes of Her Majesty’s Revenue and Customs which is a bit intimidating.” **Client interviewee**

“I found it quite good actually. Normally it’s quite easy to understand and it gives pointers [...] So like, you know, it’ll say ‘thank you for your application’ and then it explains to you what is going to happen next. But it’s not written in really complex terminology so it’s easy to pick up. And the way it’s spaced out. ‘Cause some letters that you get from the Department for Work and Pensions are quite jumbled together. Whereas with Social Security Scotland things are actually a bit more spaced out.” **Client interviewee**

“Anything that I’ve put forward, like if you need an interpreter, it’s available. If you need British Sign Language it’s available. We’ve had Easy Read forms, we’ve had information if you need it in a larger print. So from an accessibility point of view, no problems. The video, we have a slow connection but we’re still able to communicate. And if video conferencing is the way forward then great, and I hope it is.” **Client interviewee**

Client interviewees also spoke of being able to easily access information about Social Security Scotland’s services. Some said the website was informative and easy to use. They talked about using other parts of the service as a result, for example, phoning to speak to someone or applying for a benefit. Again, interviewees described the application process as ‘straightforward’ and ‘easy’, whether it was online, paper or over the phone. The examples below show the different ways interviewees have accessed and used Social Security Scotland’s services.

“The website and online form are really user friendly. It’s laid out in a really simple straightforward way so that there’s nothing confusing about it. There’s nothing where you’re sort of thinking ‘what does that actually mean’ or ‘what am I supposed to tick for this part’ or anything like that. It’s just all really straightforward and easy. I don’t really know anything about website design, but I know when I’m using a website that isn’t designed well and when I’m using one that is. And [the online form] has been well designed so that it’s not stressful to navigate and it’s not stressful to use and it didn’t feel very long. The questions that were asked were all relevant. It feels like the forms just ask for the necessary information and nothing too onerous or too much information. It’s just really concise.” **Client interviewee**

“It’s always been so straightforward. It’s probably one of the only things that I’ve ever applied for, up to today, that’s been easier than any other application I’ve ever put in for anything.” **Client interviewee**

“Very easy [...] Yeah, it was [a paper application]. There was no problem whatsoever [...] The girl I spoke to on the phone was exceptionally helpful, especially at that time.” **Client interviewee**

A few interviewees talked about finding out information and communicating with Social Security Scotland through social media. This was helpful because it allowed them to be kept about to date about benefits on platforms they already use.

“I found it online, it was easy enough. They’ve also got a Facebook page which helps. I think that was where I first saw it. It was the Scottish Child Payment and I’m sure they had a link on the Facebook page to apply for it there which helped. [...] It’s handy, especially for somebody like me. I communicate to some of my family through Facebook. So if I’m scrolling through and it comes up, I go ‘Oh yeah, that’s right’ and it’s a reminder.” **Client interviewee**

“Clear and very detailed. To the point. [...] I think there was [Social Security Scotland staff] on the Facebook page. They were saying ‘this is what the grant is for, this is where it’ll get paid, this is when your next payment would be’. And if anybody had any questions they provided the contact telephone number to give the call centre a call. [...] That was quite helpful as well ‘cause I had gone between them and Social Security Scotland’s website just to keep an eye on it.” **Client interviewee**

When client interviewees were asked if they had been able to communicate with Social Security Scotland using their preferred method, the most common feedback was that it would be preferential to receive information via email rather than post. There was also an appetite for video calls and web chat⁶.

“It’s about time we did video calls and email contact. Or WhatsApp messaging or other messaging services. It’s how people with disabilities are more able to contact. Some people can’t fill in the form. Some people have difficulties in using the telephone and we should have all methods available for them and I feel Social Security Scotland has the ability to contact by email. Even the [web] contact form is better.” **Client interviewee**

“This kind of interview [over video call] is so much easier and so much better. Otherwise I have to arrange to bring somebody with me just to help me and to speak for me sometimes. ‘Cause I’ll forget what I need to say and they’ll be like an advocate for me and they’ll just be like ‘didn’t you want to say that?’ and I’ll be like ‘yeah but I completely forgot’.” **Client interviewee**

Though most client interviewees said that they found the information on guidance, letters or application forms clear and easy to understand, one interviewee expressed difficulty with this. The interviewee felt this was a barrier to them accessing Social Security Scotland’s services.

“Basically I couldn’t understand a word of it, because of my [condition]. And my Mum, I normally delegate filling out all the forms to her but this one I kind of wanted to do myself. And I had to get her help because some of the words were not as easy to understand as others. So maybe making the words easier to understand.” **Client interviewee**

⁶ Web chat was introduced at the start of the COVID-19 pandemic.

Staff respondents were also asked questions about accessibility and how confident they felt to deliver a service based on inclusive communication. Staff were split between those who felt the service was accessible and inclusive for Social Security Scotland clients, and those who felt aspects of the service could be improved. For example, some staff respondents echoed clients' views that information and communications are easy to understand. Others highlighted how they felt confident interacting with clients who understand information and express themselves in different ways. This included tailor communications to client's specific needs and providing information in different formats.

"Easy read documents have been a great help." **Staff respondent**

"Details of any special requirements the client has can be found in the client record." **Staff respondent**

"We offer a range of options in terms of communicating with clients who may need additional help." **Staff respondent**

"A lot of clients with speech/language difficulties use web chat. Being trained on web chat and working it has helped me feel more confident and conscious about my wording." **Staff respondent**

As above, staff respondents spoke of developing a self-awareness about how they communicate in an inclusive way with clients and colleagues. They praised training and guidance for this, commenting that messages around inclusive communication are regularly reinforced by the organisation. Knowledge of the system and their job roles also respondents felt confident about delivering an accessible and inclusive service.

“Great support from the Inclusive Communications team as well as a very helpful session, really made me think about how we communicate.” **Staff respondent**

“The eLearning module for inclusive communication was very informative and a good insight into why it's so important to be mindful of the types of communication we use.” **Staff respondent**

“There is lots of information and resources available for inclusive communications, and whilst I am not very confident I will get this right at all times, I am confident I can call on others to steer me in the right direction.” **Staff respondent**

“Knowing what I am talking about helps me to feel confident and experience talking to different people.” **Staff respondent**

Other staff respondents felt that the service could be made more accessible and inclusive for clients. This was because particular services were not available to staff to help meet clients' needs or because staff were not confident using the services which were available. Some of these respondents said interactive, practical and more localised training would provide them with greater confidence to communicate with clients in line with their needs.

*“I have had clients ask me if we can send letters with different coloured backgrounds which are designed to help those with dyslexia but these are not available.” **Staff respondent***

*“There are not enough people in the Scottish Government and in Social Security Scotland focused on digital accessibility and inclusive communications, especially with updating and improving the processes and systems currently in place.” **Staff respondent***

*“Communication options that I am trained in are limited to phone calls and letters only, so it's not that inclusive.” **Staff respondent***

*“More hands on workshops and training to develop my skills, especially in the use of assistive technology.” **Staff respondent***

*“I'd maybe like to see them more in action, as I wouldn't know how to access things like sign language calls if a client requested it.” **Staff respondent***

One specific example of staff respondents feeling unsure or unable to meet clients' accessibility needs was the translation processes for clients who first language is not English. While one respondent felt the service was 'easy to use', others said that processes were misunderstood among staff. There also appeared to be some confusion among respondents about what letters could be translated into other languages.

“The process surrounding communicating with clients whose first language isn’t English could be better understood. Client advisers often avoid translation calls by requesting a translated letter instead which delays the client journey for those particular clients.” **Staff respondent**

“We need to have [supplier of Best Start Foods cards] send out their information in the client’s language. They only send letters in English now.” **Staff respondent**

“Clients should be receiving all letters in translated formats and at the moment there is not a process that allows ALL letters to be sent to clients in the translated version.” **Staff respondent**

Staff respondents were asked if they felt supported to communicate with colleagues in a way that felt inclusive of their own needs. Some respondents felt there was not the same emphasis on ensuring communications are inclusive internally within the organisation, highlighting for example, the use of acronyms.

“I would appreciate if the same easy to understand information was available for staff as well. I sometimes feel answers are vague and difficult to follow.” **Staff respondent**

“While a lot of information has been provided to staff regarding inclusive communication, there is still a lot of acronyms being used in communications.” **Staff respondent**

Staff respondents mentioned a range of communication methods that helped them connect with their teams and colleagues. These included: online tools such as Microsoft Teams, Yammer (online staff forum) and Trello as well as video calls, teleconferences and email.

“There are multiple ways of communicating - email, Trello, Teams, phone calls! Group chats have been set up and individual chats. Regular meetings are also essential to inform staff/disseminate information about various communication tools. I have been encouraged to communicate with colleagues outside my department and I think fika chats, being able to talk to anyone in the organisation, is a great way to interact outside your own team. Yammer is also very good and allows staff to share their own interests as well as passions.” **Staff respondent**

A majority of staff respondents commented that the introduction of new digital tools had improved their communication with colleagues whilst working from home during the COVID-19 pandemic. These respondents felt that tools such as Microsoft Teams had supported them to have more regular meetings and discussions, and have helped to build effective team relationships. Some said a benefit of video calls was being able to see colleagues and that this had helped to avoid feeling isolated while working from home. Others felt that these changes had been made too quickly without first understanding how they would impact on different groups of staff in the organisation. One respondent said guidance on when to use different digital tools, such as Teams or email, would be helpful.

“I think the introduction of Teams has allowed me to communicate better with colleagues I might not have during this Covid challenged period. It's allowed me to build longer lasting relationships that I might not have established had I been based in an office.” **Staff respondent**

“Since we have been able to use the video facility with Teams, I have felt more included than I did in the office environment.” **Staff respondent**

“Being able to use messaging to contact my manager for support on an ad hoc basis rather than having to wait for a certain meeting time and room. I think that working from home has made this more commonplace and I feel that I don't have to wait with lots of questions until a certain time and can get a quick answer.”

Staff respondent

“There have been numerous issues around digital accessibility that has meant we have been unaware of how change affects staff with user accessibility needs. Because we have not understood or been informed about how changes affect these users, we have not been able to tailor our communications or meet with staff to talk them through the impact. This badly affects the user and also hurts our engagement.” **Staff respondent**

A couple of staff respondents mentioned the impact of not being able to communicate with colleagues face to face while working from home. A couple of comments said that information about other teams and Social Security Scotland's structure would help them to feel more supported.

“I again do not think anything else could have been done. It would have been nice to have the occasional meeting face to face, however this is just not possible considering the current situation.” **Staff respondent**

“I've organised my own interactions/communications and I'm not sure it's immediately apparent which avenues can be taken to communicate. The cascade brief and colleague newsletter are somewhat narrow and there really needs to be a staff intranet where details of the work being done by some of the projects, teams and groups can be shared in a more accessible way. Understanding what team does what, the structures of the organisation and who's who is not shared in an easy way. Notes from Executive Team and Agency Leadership Team are embedded so deep in the current intranet that they are impossible to find.” **Staff respondent**

Most partner organisation respondents (nine out of eleven) said they had been able to communicate with Social Security Scotland in the ways that they prefer.

Partner respondents were asked how accessible they thought Social Security Scotland's service has been for clients. Most respondents (nine out of eleven) said they thought the service provided by Social Security Scotland had been accessible for clients (Table 2.2). Two respondents rated the service as not at all accessible.

Table 2.2: Partner organisation respondent views on accessibility for clients
All respondents (n=11)

Response options	
Very accessible	3
Somewhat accessible	6
Not at all accessible	2
Don't know / Not applicable	0

Those respondents who said that they thought the service was somewhat accessible or very accessible were asked if they could think of an example when accessibility was good for a client they were supporting. These respondents said that clear, accessible information provided on the website and the ability to apply for a benefit online were key examples.

"Clear digital signposting on website." **Partner organisation respondent**

“Majority of clients so far have been accessing the Young Carer’s Grant and have applied online with guidance. There have been no significant issues reported which is suggestive that in general things are working well.” **Partner organisation respondent**

Those respondents who said that they thought the service was somewhat accessible or not at all accessible were asked if they could think of an example when the service wasn’t accessible for a client they were supporting. Of the four responses received, two clients noted occasions of digital exclusion. We asked respondents if Social Security Scotland had addressed this accessibility issue. On both occasions, the respondent said they or their organisation addressed the situation themselves.

“A digitally excluded client had to be made digitally capable via our distribution of Connecting Scotland hardware and digital champion support...It was our call to make the client digitally connected and capable.” **Partner organisation respondent**

“I contacted [Social Security Scotland] regarding completing a paper form at a house visit and the person on the phone kept saying it would be better if the client did it online even though I had explained several times that the client had no access to the online form and had learning difficulties [...] I obtained a paper form, completed it, and it was processed and paid.” **Partner organisation respondent**

Staff respondents rated their confidence to deliver a service based on inclusive communication (Table 2.3).

Table 2.3: In the past year, how confident have you felt to deliver a service based on inclusive communication?

(n=91) Column percentages

Response options	All respondents (n=91)
Very confident	35%
Confident	53%
Not confident	11%
Not at all confident	1%

The majority (88 per cent) said they felt confident or very confident in their ability to deliver a service based on inclusive communication. Around one in ten (12 per cent) said they didn't feel confident to do this.

Staff respondents who work with clients were asked how confident they felt about interacting with clients who understand information and express themselves in different ways (Table 2.4). Most described themselves as confident or very confident.

Table 2.4: In the past year, how confident have you felt to interact effectively with clients who understand information and express themselves in different ways?

(n=43) Column percentages

Response options	All respondents (n=43)
Very confident	28%
Confident	63%
Not confident	9%
Not at all confident	0%

3. A Learning System

Using feedback

Additional support suggestions

The Charter Measurement Framework asks for “Qualitative evidence on any additional support Social Security Scotland can put in place for clients.”

During the interviews with clients and the survey with staff, we gathered evidence on what additional support Social Security Scotland can put in place for clients. Client interviewees made a wide range of suggestions. As discussed, some interviewees said that email was their preferred communication method and would make it easier from them and others to interact with Social Security Scotland. Staff respondents made similar comments.

“I think the way forward would be an email avenue for sending emails back and forward. It’s quicker and it’s secure as can be. It can be done anywhere in the world, or anywhere in Scotland. So if I do go on a small break or I get a respite, I don’t need to be in the house to receive it. I can answer it on my email. But if I’m away the letter would sit unread and that might bypass a date or a response. Whereas if I got an email I can do it right away. If I’ve got a question someone can pick the email up. [...] How I would know it’s Social Security Scotland [emailing me]? I would know because of the logos and because of the email address.” **Client interviewee**

“Clients would prefer an email address to send documents to Social Security Scotland rather than downloading. Some clients only manage to send one page of a document rather than several that are required.” **Staff respondent**

A couple of interviewees suggested that in general Social Security Scotland's guidance for clients could be more detailed with better signposting to additional information.

"Social Security guides are a bit too simplistic. I know they're trying to make things simple, but it's too basic. [So more details would be helpful?] Yes. Or even if you want more details, have something like 'click this link to get more info'."

Client interviewee

Others had specific improvement ideas for the online application process. Suggestions included web chat support specifically for completing the form, embedded guidance in the form itself, and a reference number after submitting. One interviewee suggested an online portal for clients to provide updated personal information and find out more about their specific eligibility. This would include prompts to encourage people to apply for benefits they are entitled to.

"A wee online portal or something like you can use with a password and you can go and change or add children. It would just make it easier if you could go and update your details and make sure that everything they hold about you is correct and there's not somebody missing. Just in case there is something that you might miss. Because other than posting on Facebook and stuff there's not really... you only hear stuff word of mouth 'cause you can't even go to nurseries anymore or schools. And the posters in the schools might remind you to claim for this, but now there's nothing. So a lot of people might be missing stuff unless you hear it from other mums... Because if you were picking up your kids from nursery you'd be seeing posters about Best Start Grants or whatever and like 'claim before this day'. And I've not seen anything that reminds me that I need to claim something before she starts school or before this or before that."

Client interviewee

“I’ll say the only thing when I completed the application online and submitted it, I didn’t get a reference number or a confirmation email or anything like that. So, although you get the screen saying it’s been submitted I had nothing to take a note of, or a reference number or a confirmation email or even a text message... I wasn’t too worried about it but I suppose I would’ve preferred to have something that if I had needed to phone up about it I could have given, like say a reference number.” **Client interviewee**

A few client interviewees and staff respondents suggested providing clients with additional support through clearer information on eligibility, specifically criteria and key dates. Some wanted to be notified when they might be eligible for a benefit.

“I got a letter last month saying it will be stopping, but they don’t say how long you’ll get and whether it includes the day of the birthday. That would be something [to add] if that makes sense. Because the way some of the birthdays fall, my [daughter’s] is kind of at the end of August and you don’t know if you’re going to be paid for the week of the sixth birthday or if you get it for the week before... We’re now in the last week of July, less than 4 weeks away, and nothing’s been said.” **Client interviewee**

“More information on disability benefit dates. It is near impossible to find this information on the intranet or internal systems. I can only find these dates via the gov.scot website. So many of our clients ask for this information and it is becoming increasingly difficult to provide accurate information.” **Staff respondent**

Some client interviewees suggested that additional support could be put in place for particular groups of clients. This could involve targeted communications and extra information for people in vulnerable positions, for example, elderly people and people whose first language is not English. As discussed, staff respondents raised the need to improve the translation service for clients and internal processes for staff.

“I think that they should find some way of communicating, sharing the information and also give some reassurance for people that are really in [a] difficult situation. For example, as I mentioned [to] you, at the beginning of the pandemic maybe they could share information with target groups like ‘don’t worry we will be, even if there are a number of restrictions, but we are working, if you are in that [or] that situation we can support you.’ Sometimes a reassurance would help people to not be worried. A way to emotionally support people that are really worried.”

Client interviewee

“Yes, it can support people of my age group who really don’t know what’s going on. [They] should get more help in that respect. Regardless of what it is, it should be followed up. To me that’s the main thing that should be followed up, especially for widowers and that. I really don’t know anything at all about forms and stuff like that. [...] I think anything that you’re entitled to, you should be told you are entitled to and it’s entirely up to you if you want to go ahead with that or not. You would have the option.”

Client interviewee

“They have quite a lot of options on the website. They do say on the website that if English is not your first language you can get an interpreter. But if someone doesn’t understand English at all and can’t read English it’s not that much of a difference. If you can’t read English they won’t know what that one was for.”

Client interviewee

Examples of You said: We did

The Charter Measurement Framework asks for “Examples of You said: We did”.

Staff respondents and client interviewees were asked if they or someone they knew had made a suggestion about how Social Security Scotland could improve. They were asked who was told, what was done about it and whether anything improved as a result. Only staff respondents provided examples of this. Around two thirds (67 per cent) of staff respondents said that they had been aware of a situation where a suggestion had been made about how Social Security Scotland could improve.

Table 3.1: Have you been aware of any situations where a client, staff member or partner had a suggestion about how Social Security Scotland could improve?
(n=92) Column percentages

Response options	All respondents (n=92)
Yes	67%
No	33%

Some of these respondents provided clear instances of times when feedback led to an improvement. This included suggestions about internal staff processes as well as ways to improve the service for clients. For example, one respondent talked about making a suggestion to improve data security, whilst another described improvements to staff working patterns.

“As the area of work I am involved in is relatively new there have been several times over the past year where suggestions have been made involving security checks [...] A more robust checking regime was required. This was devised and incorporated into the client advisor role [...] There are more robust checks now in place and security around clients’ personal details.” **Staff respondent**

“Telephone rotas for Funeral Support Payment came out with shifts in them from 11am to 2pm. It was pointed out that people needed a lunch break and not at 10.30am or 2.30pm each day. Rotas were amended with a thirty minute break incorporated at 12.30 for advisors on that shift.” **Staff respondent**

Other staff respondents talked about providing suggestions to improve the client experience, for example, working with other colleagues to review information and policy, as well as improve benefit take up.

“Young carers are often too frightened to claim Young Carer Grant in case their cared for person will lose their Department for Work and Pensions benefits [...] I spoke to the Communications Team who immediately took this forward and issued a clear message on social media. I spoke with colleagues in Operations who advised the clients / stakeholders to ensure applications were submitted. If any information was missing then they would investigate any missing evidence. As a result of this, 3 young carers received their Young Carer Grant which was amazing.” **Staff respondent**

“I realised that Cold Weather Heating Allowance was not helping some families with very disabled young people as they were receiving Personal Independence Payment not Disability Living Allowance. I took this to Scottish Government Legal Directorate and Policy. Many meetings were held, and outside Counsel's opinion was sought. A review of the Policy and Regulations is underway. I have been kept informed.” **Staff respondent**

“Clients will sometimes suggest that guidance on our website or the MyGov site should be improved when providing benefit specific information. These would be [fed back] to our policy and communication colleagues. In some cases action has been taken to improve the guidance, where the information is not clear or causing confusion.” **Staff respondent**

Some staff respondents provided examples of times when they provided feedback but were not clear on whether this led to an improvement. In the comments below, respondents raised suggestions about a wide range of issues such as staff training, job roles, internal guidance and policy, client accessibility to management and senior leaders. In these instances, either the outcome of the feedback was not known to them, or no immediate improvements had yet taken place.

“I have had a couple of clients ask me for letters to be sent in formats that are easier to read for dyslexic people. I told my line manager in a discussion session on improvements that could be made. He reported it to a performance manager. To my knowledge nothing has been done.” **Staff respondent**

“A client advisor raised problems with the introduction of policy changes in a senior management call [...] Senior management listened to the client advisor and arranged a meeting with them to go over the issues and produce a plan of action [...] [There have been] no immediate improvements as of yet but the issues were large and wide-ranging. Management did agree to start a consultation into them and get back to the client advisor when they had concrete proposals.” **Staff respondent**

*“Q. Have you been aware of any situations where a client, staff member or stakeholder had a suggestion about how Social Security Scotland could improve?
Wrong information in guidance, contradictory and misleading for client advisors.
Q. Who was told and what was done about it?
Feedback left and escalated through management.
Q. Can you tell us whether anything has improved as a result?
Still awaiting guidance amendments.”* **Staff respondent**

*“Q. Have you been aware of any situations where a client, staff member or stakeholder had a suggestion about how Social Security Scotland could improve?
On the leaderships calls - colleagues giving feedback on how things were working and how things can be improved for our roles. Also providing feedback on the training [they] had for Scottish Child Payment and Best Start Grant and how this could be improved for disability [benefits] so that they do not encounter the same issues.
Q. Can you tell us whether anything has improved as a result?
Unsure at this time.”* **Staff respondent**

A few staff respondents similarly commented that their suggestions had not been actioned because there is a 'backlog' of improvements which take priority, or because they felt that the suggestions were overlooked.

"Q. Have you been aware of any situations where a client, staff member or stakeholder had a suggestion about how Social Security Scotland could improve?"

I am in situations daily [where] suggestions are made - even when these are made, they go into a backlog. [They are put] into a long list of things needing actioned

Q. Can you tell us whether anything has improved as a result?

Nothing as yet [...] still in limbo." **Staff respondent**

"Just general recommendations about how things could improve, and how attitudes of staff could change. It was mentioned in [a] team call and concerns were raised but it appeared to drop off the radar. Initially, staff were hopeful of change, but then it has been left to not really go any further." **Staff respondent**

Client Experience staff participants were asked about instances where a suggestion or complaint had led to changes in the way Social Security Scotland operates.

Participants specified that client feedback and complaints had led to changes in the website and updates to the telephony script with a shorter message and no duplication of information. They also mentioned more generally that feedback and complaints can highlight training gaps among staff which are then dealt with by managers.

"We've had complaints that have led to website entries being changed because clients thought the website information was a bit misleading. So we've clarified website entries and made changes to the website. We've made changes to the telephony script based on a client who said 'why do I have to listen to the recorded message about data protection twice? If you could make it a bit shorter that would be better.' So we did that with Data Protection colleagues." **Client Experience staff participant**

Partner organisation respondents were asked whether they agreed or disagreed with statements about how Social Security Scotland values and uses feedback. Most respondents (eleven out of thirteen) agreed that Social Security Scotland is open to feedback (Table 3.2). Fewer were as certain that Social Security Scotland acts on feedback. Seven out of thirteen respondents agreed with this statement.

Table 3.2: Partner organisation respondent views on feedback

All respondents (n=13)

How much do you agree or disagree with the following...:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know
Social Security Scotland is open to feedback	11	1	1	0
Social Security Scotland acts on feedback	7	4	1	1

Eight out of eleven partner organisation respondents said they had given Social Security Scotland feedback about how they could improve. Two respondents said they did not know how to give feedback. Respondents were asked about the situation in which they had given feedback and about whether Social Security Scotland acted on this feedback. Most said they provided feedback on a range of different issues through the official stakeholder reference groups and felt that their suggestions had been acted on.

“We have given feedback on a range of issues including accessible communications, staff recruitment and equalities training, mainstreaming, reporting and action planning [...] In all instances we have received acknowledgement of feedback and been updated on how this has been acted upon.” **Partner organisation respondent**

A few respondents noted their involvement in research and user testing.

“I was involved in customer testing the website development [...] Accessibility tweaks were made.” **Partner organisation respondent**

“By feedback I mean completing surveys, most especially with regard to disability payments.” **Partner organisation respondent**

Only one respondent said that they had provided feedback about Social Security Scotland’s service and felt that the organisation had not acted on this feedback.

“Inexperienced staff, unrealistic expectations about the potential service. Urban-biased service design [...] Deflection and no recognition of the issue.” **Partner organisation respondent**

Acknowledgement of mistakes

The Charter Measurement Framework asks for “Examples of acknowledgement of mistakes.”

One client interviewee mentioned an example where Social Security Scotland had made a mistake. The interviewee said they had been overpaid and were sent a letter stating that this had happened in Social Security Scotland’s error. The interviewee felt this action was open and honest. This interviewee also felt “trusted”, “valued” and “respected”.

“It was all detailed in a letter. It said that I’d been paid something twice, and it clarified that it was an error on the part of Social Security Scotland and they won’t be asking [me] to pay this back. So, yeah it was all really really clear in letting me know. [...] I just thought it was really well handled because obviously mistakes do happen. But I just really appreciated that it wasn’t a situation that I was blamed for. You know like, there wasn’t a suggestion that I had done anything wrong. It was just really straightforward like ‘this happened but don’t worry about it, this is our fault and there’s no need for you to do something’. I did really appreciate that I wasn’t asked to pay [it] back. [...] Yeah, it really confirmed the feeling that I had with all the interactions that I just sort of trust the organisation and I feel valued and respected. And I think you used the word ‘trusted’ which is a really good way of putting it because I think that’s not always the case with benefits and that’s a really good example of me being trusted and not being sort of blamed for having an overpayment or made to feel I had done something wrong. It just confirmed my positive experience with the organisation. It made me feel like I’m in good hands and if I need support in the future, it’s going to be there. It’s not going to be a grudge [...] I just feel I’m in good hands.”

Client interviewee

Client Experience staff participants mentioned other instances where Social Security Scotland had made mistakes including giving the wrong advice to a client and overlooking evidence with an application. Participants gave an example where a client had applied for Best Start Grant but was too late to apply. They were initially advised to follow up a different resolution which came to nothing. The client would have preferred to be told the truth that they were too late to apply for the benefit. At the end of the process, the client was angry and upset that the situation had been drawn out instead of being told the truth straight away. Participants said Social Security Scotland acknowledged the mistake and apologised to the client.

“I think the client had been told what they wanted to hear rather than what they needed to hear. The client said they would have appreciated being told the honest truth on day one that ‘unfortunately you’re too late to apply, we don’t have any leeway and I’m really sorry we can’t pay this to you’. The client felt they would have accepted that. But instead they had been encouraged by staff to keep pursuing a different resolution which unfortunately was never going to happen. In the end there was not much we could do for that client other than apologise and make sure going forward it doesn’t happen to them or another client in future. But the client didn’t want apologies and were past apologies by that stage. They were angry and disappointed.” **Client Experience staff participant**

In another example, Client Experience staff participants mentioned that a client had uploaded the required evidence initially but Social Security Scotland staff had accidentally overlooked an attachment when reviewing the application. The application was denied due to missing evidence and the client asked for the decision to be looked at again. Staff checked the evidence and changed the decision upon realising their mistake. They then informed the participant of the error and new decision via telephone.

“The reason we denied the application was because the client hadn’t provided any evidence to show that she was pregnant. When she asked for a re-determination she said she did provide evidence as attachments to her application. When I went in and checked the application, the attachment was there and it was all valid. So if someone had looked at the attachments at the application stage they would have seen the evidence. She got awarded after the re-determination. But that’s what it was. We hadn’t looked. It was there and she had provided evidence from day one. It had just been overlooked for whatever reason and we had denied her saying there was no evidence. So we changed the decision for her and she was happy with that. I phoned her up and let her know that ‘yeah you’re going to get this’. It’s just common courtesy and she was happy I’d taken the time to phone her. And I said a letter will come out explaining everything. I gave her my name and said to call the contact number on the letter and ask for me if she had any questions.” **Client Experience staff participant**

Two out of twelve partner organisation respondents said they were aware of a mistake made by Social Security Scotland. Only one respondent provided additional information, describing an occasion when a benefit was disallowed by mistake. The application was looked at again and the benefit awarded.

“Funeral Payment [was] refused in error [...] Decision was looked at again and payment awarded.” **Partner organisation respondent**

Client experience of the complaints and feedback process

The Charter Measurement Framework asks for “Qualitative evidence on client experience of the feedback process” and “Qualitative evidence on client experience of the complaints process.”

Client interviewees were asked about their experiences of the feedback and complaints process. Very few interviewees said that they had experience of this. Interviewees explained that they had nothing to comment on, or that even when things did not work the way they had expected them to, they did not feel the need to feed this back to Social Security Scotland. Some of the reasons for this included the issue being minor, not wanting to get a staff member into trouble or not knowing the best way to give feedback.

Clients are able to provide feedback or complain to Social Security Scotland online, over the phone or via post. A few interviewees explained that they had given feedback in other ways. One interviewee made suggestions through a survey from Social Security Scotland because they did not feel a formal complaint was necessary. This was because a staff member was not able to answer their query over the phone on two separate occasions (see page 30). Another respondent said that they had provided suggestions on an appeal form because they had not been aware there was a formal way to provide Social Security Scotland with comments or complaints. This interviewee was providing feedback about eligibility rules.

“I didn’t make a complaint but I got a questionnaire thing through, I think in an email or a text. I said [there] that after speaking to someone that they had no clue about the benefit that I had phoned up about and I had more knowledge than them. But I never made an actual complaint. [...] Because they were obviously new and it wasn’t her fault and there was no point in getting them in any trouble.”

Client interviewee

One interviewee did use provide online feedback about an issue on the Social Security Scotland website. While the feedback was addressed and the issue was resolved, this interviewee did not recall receiving any direct contact to acknowledge this or update them. A staff respondent raised a similar issue about not getting a response following a suggestion.

“Q. Can you tell us whether anything has improved as a result?

Not yet

Q. Can you say anything about how the outcome was fed back to the person who raised the issue?

They get an email, but if it goes through feedback on [the website] sometimes you don’t get an answer.” **Staff respondent**

Only one interviewee said that they had made a complaint to Social Security Scotland. This client felt the eligibility rules for a benefit was confusing and unfair.

Client Experience staff participants were asked about the kinds of suggestions and complaints made by clients. In a number of cases, clients were unhappy with the eligibility criteria for Social Security Scotland’s grants and benefits. For example, a client had expressed frustration about not meeting the eligibility criteria for Job Start Payment and felt the decision letter lacked an explanation about this. In this case, a Client Experience Officer spoke with the client and helped to explain the criteria. The client was also signposted to Scottish Government Policy and given contact details for escalating their complaint to core Scottish Government.

“The client was unhappy with the qualifying criteria for Job Start Payment. They didn’t think it was very fair. So I directed them to Policy because they are the ones who set the criteria. I gave the client the contact details for getting in touch with Policy and they were happy with that. They just wanted to let us know that they were unhappy that the criteria excluded them. It was resolved to the client’s satisfaction. It’s not a complaint against Social Security Scotland but we do deal with clients who are unhappy with the criteria and then we signpost them to the right place.” **Client Experience staff participant**

Other clients had complained about Social Security Scotland’s processes, particularly in relation to Best Start Grant and Foods. Clients had complained about Best Start Foods payments being late. Some were also unhappy with the payment timescales for Best Start Foods and said they found it frustrating to wait four weeks for the next payment if one was missed. Other Best Start Grant and Foods clients had complained about a lack of communication and updates during the application process. For example, some clients complained they had missed the application window due to not receiving return calls from Social Security Scotland within the timeframe promised. Similar complaints had been received from clients across other benefit experiences about not receiving a return call when they were told they would.

“It wasn’t just the fact the Best Start payments were late or clients weren’t getting their money. The problem was not being kept in the loop or kept updated. Sometimes they were getting misleading information or calls weren’t being returned in the timeframe offered. So it was almost a perfect storm of things going wrong. Not being updated tended to be a common complaint made by Best Start clients.” **Client Experience staff participant**

Other complaints on communication included clients receiving misleading information during interactions with Social Security Scotland. In particular, clients were unhappy about being passed through a variety of members of staff during their interactions which sometimes led to receiving contradictory or misleading information.

“I would say the bulk of our complaints across all benefits are about not being kept updated, getting misinformation, being told different things by different staff, or not being called back when promised. It’s been about the lack of people taking responsibility for a client’s issue and being passed from person to person and nobody really grasping the issue and following it through for the client.” **Client Experience staff participant**

Although there hadn’t been many complaints about staff manner, one participant mentioned a case where a client had complained following an interaction with staff. In this instance, the client was unhappy with how they had been spoken to by the staff member and felt they had been treated badly during the call.

“We rarely see this type of complaint, but there was one instance where the client advisor was outright rude to the client. The client was quite distressed at that point anyway and ended up in tears on the call because of the way the advisor spoke to them. The client was mortified and upset. We managed to resolve the complaint for the client and they were happy in the end, but that was one example where a client complained about their interaction with staff.” **Client Experience staff participant**

Client Experience staff participants were asked about how the complaints process works for clients. They said that Client Experience Officers often speak to clients directly during the complaints process. Participants said that clients have generally appreciated the personal contact with a Client Experience Officer during the complaints process and having a staff member listen to their complaint.

“In Client Experience, when we start to speak to a client about their complaint most of the time they are really happy that you’re actually speaking to them directly. They’re happy that you’ve acknowledged why they’re complaining and you’ve told them what you’re going to do. You’ve given them the timeline of what will happen next and you’ve taken accountability for dealing with the complaint. I think that really does help the client in terms of restoring their faith in Social Security Scotland. Clients might have been passed from pillar to post and they’re just happy when someone eventually speaks to them.” **Client Experience staff participant**

A trustworthy organisation

The Charter Measurement Framework asks for “Examples of openness and honesty or otherwise (if applicable)” and “Organisations that support clients evidence on openness and honesty of Social Security Scotland”. These are alongside measures from the Client Survey about openness and honesty.

Client interviewees were asked their thoughts on whether Social Security Scotland was open and honest or if they felt that the organisation had been dishonest or misleading to them at any point. The majority of interviewees said that they had found Social Security Scotland to be open. Some examples of this included Social Security Scotland providing clear information about processes and timescales (such as next steps, payments and regular updates on applications) and about how the organisation uses personal data. Specifically, some interviewees noted that communications such as application forms, letters and general guidance used simple and straightforward language. They felt it was easy to get the information they needed.

“[They are] very open, very honest, very transparent in what they’re doing. Treated me as a person, not as a number and kept me informed at the right time. [They] kept me informed of changes. Letters are clear and concise. I can read normal size writing like 14 which is the national standard. And the actual wording of it isn’t ‘gobbledygook’ unless you understand it. It’s all been clear and one or two pages, not 20 pages like you normally get. So yeah, again, I can’t fault it.”

Client interviewee

“[I] just think because any time I have communicated they’ve given me a straight answer and it’s just been kinda straightforward.” **Client interviewee**

A few interviewees highlighted the Social Security Scotland website as being good in this regard, while others highlighted interactions with staff. These respondents said that staff were able to give them clear answers and provided examples of when staff told them about other benefits they may have been entitled to. Interviewees felt that this made staff both knowledgeable and open.

“Yeah, they’re open. They’ve got lots of information and stuff. It’s not as if they’re hiding how to do...how to apply for things. I find it quite straightforward to use the website and things. [...] I think it’s a very simple website to use [...] It’s all there for you. You don’t have to hunt around for things.” **Client interviewee**

“Yes, uh-huh, [for] everything I applied for I was told there would be a 6-week wait because there’s a backlog because it had just opened. And I didn’t know about the Best Start Foods thing and they were open and told me about it.”

Client interviewee

As well as using simple, straightforward language to deliver information, one interviewee felt that Social Security Scotland was open because they explained why they were doing certain things, alongside the what and the how. The interviewee also felt the language and images used on Social Security Scotland's social media materials were inclusive and representative. These factors made this interviewee feel valued and to consider Social Security Scotland as personable and trustworthy.

"It's just the wording in the letters. [...] I don't know, just like sometimes with Disability Living Allowance I think you get like a £10 bonus at Christmas. So they just send you a letter saying 'You'll get a £10 bonus at Christmas' [does robotic voice], just like a fact. Whereas Social Security Scotland was like 'We're going to give you this Carer's Allowance bonus because we really value what you're doing and you're really important to the communities and blah blah blah' and that's just really nice. You don't expect something nice from organisations. So it was less robotic. [...] Even the stuff that you see on social media, if it's like a video or image about something to do with things they're doing. Like the Best Start thing, the videos or whatever stuff that accompanies it all seems like 'Oh here are real people that look a little bit like me and they're explaining what this is for and why it will help'. You just don't get that with other big organisations."

Client interviewee

A few interviewees, though they did not think Social Security Scotland had been intentionally dishonest or misleading with them at any point, felt there were times where the organisation could have been more open and clearer about things. For example, one interviewee said that it had been difficult to communicate with Social Security Scotland during the start of the COVID-19 pandemic.

"I think because COVID happened sometimes it was a lot harder to communicate in the past year." **Client interviewee**

Others felt there could be more openness and awareness raising about Social Security Scotland's services and benefits, particularly for those without access to the internet. Several interviewees said they had initially heard about Social Security Scotland through a third party. Some with Carer's Allowance Supplement experience said they hadn't heard of Social Security Scotland before receiving the payment. A handful of interviewees said they wanted Social Security Scotland to be clearer about the benefits and grants they deliver compared to the Department for Work and Pensions.

"I would say not necessarily an issue but... I would say that Social Security Scotland really needs to get out there and tell people that there are benefits for them to claim. [...] I've already had to do a lot of paperwork and I know how everything works, but I know a lot of people are missing out on a lot of things. Not because the website is particularly bad or anything, but it's mostly because people have no idea this thing exists. If I didn't have Carer's Allowance I wouldn't have known that Social Security Scotland even existed. And to me the fact that people don't know about it, that's the biggest barrier. The website is fine, the communication I got from Social Security Scotland was perfectly fine, it went really fine honestly. The problem is that if I didn't have Carer's Allowance I would never know that that even existed." **Client interviewee**

"I wouldn't have known anything about it unless it was from the work coach who'd let me know. 'Cause I'd never heard of it before. I didn't even know that there was a payment or grant before the Early Learning Payment. [...] So it was quite lucky that the work coach let me know about it." **Client interviewee**

“I think there could be more leaflet information about a lot of the [benefits], but during the pandemic it’s not really something that they could help. Maybe if it wasn’t in a pandemic, there would have been more information accessible. [...] But if you haven’t got the internet you’re not getting the notifications from them. But it’s a tough one ‘cause right now we have not been able to go out and be in different places and see the information. It might’ve been out there but I’ve not seen [it]. I don’t know if there are leaflets around. [...] I also don’t know whether people take the leaflets and it could have been a complete waste of paper but I don’t know. I just feel for people who do not have the internet, they miss out on a lot of things.” **Client interviewee**

A couple of client interviewees felt that Social Security Scotland could have been more open because they did not receive a letter to tell them that their Carer’s Allowance Supplement would be ending. This was in contrast to the clear and informative letter they received telling them they would receive the payment. Other comments mentioned wanting Social Security Scotland to be more open and clearer about Carer’s Allowance Supplement payment dates further in advance to help with budgeting.

“I think I got 3 payments of that, before I didn’t get it anymore. [...] I understood everything [in the letters] and I already knew about it from reading in the news. I knew that it was starting and roughly when it was starting. So when I got the letter it wasn’t totally unexpected. I think I received a letter before every payment that I got. I suppose just thinking now the only thing...I didn’t receive a letter at the end of it, when I no longer qualified for it. I did not receive a letter about, you know, not getting it anymore. [Would you have preferred to get one?] I suppose so because it just keeps you right and you know everything then.” **Client interviewee**

“The only problem that I think we’ve had, and I don’t think it’s been directly Social Security Scotland’s problem, is for the December payment. It’s always at the last minute that we’re advised of the date of the payment. I think it’s because the Department for Work and Pensions seem to take forever to send the information to Social Security Scotland about who’s entitled to it. And so even at the very last minute they were never able to advise [us] of the date of the payment. That just makes budgeting a little harder in that case. [...] It’s a bit frustrating but it’s not a big deal. I know that we’re entitled so we’ll get it. So I just need to think it will be roughly this date. I wish that could’ve been better, to be advised earlier about it. [...] Usually we get the letter after we’ve received the payment anyway, so maybe if it could be done earlier. As soon as they know the dates they should send out the letter.” **Client interviewee**

Partner organisation respondents were asked whether they agreed or disagreed with statements about the openness and honesty of Social Security Scotland as an organisation. Nine out of twelve respondents agreed or strongly agreed that Social Security Scotland is an open organisation and an honest organisation.

“I have found them open, honest and willing to engage in my dealings/training events (both as a deliverer and as a recipient) with them.” **Partner organisation respondent**

Working with other organisations

The Charter Measurement Framework asks for “Qualitative evidence from organisations that work with clients on partnership working”.

Partner organisation respondents were asked a series of questions about Social Security Scotland’s performance as an organisation. They were asked whether they agreed or disagreed with some specific statements about working alongside Social Security Scotland. A majority of respondents (nine out of thirteen) agreed or strongly agreed that Social Security Scotland has worked well with their organisation in the year 2020-21. Of the four other respondents, two disagreed with this statement.

Respondents were then asked what Social Security Scotland had done well when working with their organisation. Ten left responses. Some respondents commented on positive engagement through meetings, events and general communication. A few noted their involvement on a Social Security Scotland stakeholder group, or through discussing and setting up co-location, whereby local delivery will use existing local buildings to meet with Social Security Scotland clients.

“Providing relevant information, many different emails with dates etc.” **Partner organisation respondent**

“Wanting to meet and explore co-location and mutually beneficial joint working.” **Partner organisation respondent**

“When stakeholder events are arranged they tend to be of good quality.” **Partner organisation respondent**

Other respondents said that Social Security Scotland had worked well with their organisation through formal consultation, which had allowed them to feedback on a range of issues relating to Social Security Scotland’s service.

“[They] invited us around the table to discuss the needs and rights of disabled people and, largely, to then adapt service design and delivery to meet those needs and rights.” **Partner organisation respondent**

Respondents were then asked what Social Security Scotland could have done better when working with their organisation. Nine left responses. A few said that they would like more regular and consistent communication from Social Security Scotland. These respondents said that it was important that Social Security Scotland informed their organisation at an early stage of any changes to the service. These respondents also wanted communication from Social Security Scotland on particular issues, such as local community issues and advocacy.

“Regular communication, timely updates on changes to services and help available.” **Partner organisation respondent**

“There has been no direct communication from local staff regarding local issues/clients.” **Partner organisation respondent**

Similar to client interviewees, a desire for more publicising and advertising of Social Security Scotland’s service was raised, as well as information on benefit take up. Another respondent asked for formal updates on any feedback that they provide through the stakeholder groups.

“An update perhaps on benefit take up, some good news stories.” **Partner organisation respondent**

“During the Inclusive Communication External Stakeholder Reference Group, several stakeholders [...] expressed concern over the wording and consistency of questions, use of stock images, and appropriate alternative text within the Adult Disability Payment Application Form. Staff were responsive to comments and acknowledged the need to review each of these elements. We would welcome an update on these elements.” **Partner organisation respondent**

One respondent called for greater consistency in terms of who in their organisation receives communications and invitations from Social Security Scotland and how these are delivered.

“There seems to be inconsistencies in how and to who invitations are received to various stakeholder events etc. Sometimes I get these notifications directly and other times via third parties. This needs to be made much better, particularly for advice workers who will be working with Social Security Scotland on a daily basis.” **Partner organisation respondent**

Partner respondents were invited to make further comments about their overall experience with Social Security Scotland. Comments were mixed. Some respondents were wholly positive about their experience with Social Security Scotland, commending staff and the service. These respondents were looking positively to the full roll out of disability benefits.

“Staff in a range of departments and roles have been professional, responsive and clearly committed to effective partnership working.” **Partner organisation respondent**

“My experiences thus far have been positive other than the fact that it is taking a long time to set up, meanwhile people in Scotland are still having to go through the Department for Work and Pensions assessments.” **Partner organisation respondent**

A few respondents felt there was more to do to improve partnership working between their organisation and Social Security Scotland. They noted how they could provide Social Security Scotland with advice on how to improve the service through more regular and consistent communication.

“I feel there is more work to be done in building stakeholder networks with advice workers. The advice sector has a specific role in both helping clients to access benefits, help Social Security Scotland to improve and to hold it to account. We need clear routes of communication and regular meetings where we can help Social Security Scotland to improve as the number of benefits being delivered begins to increase.” **Partner organisation respondent**

“Lacking. There is an opportunity for this service to be fantastic, however I don't think the service has been created with the views and learning from third sector organisations - such as Citizens Advice Scotland - that have been doing similar work with clients for many, many years.” **Partner organisation respondent**

Other feedback from participants

Client interviewees were asked if there was anything else they would like to discuss about their experience with Social Security Scotland.

Some expressed appreciation for benefit payments. A few described how the payments had made a positive difference to their lives. Those who had received Carer's Allowance Supplement or Young Carer Grant said the payments made them feel valued and recognised as a carer. Some felt the payments demonstrated that the Scottish Government cares about and wants to help people living in Scotland.

“That money makes a difference by the way, in myself, for me. [...] Because whatever money I get for Carer's [Allowance] I don't put it to me. I care for my partner. I'm a mum of three. My money is used to make sure there's a roof over our heads, we're fed, we have heat, water. So the money I get from you from the [Carer's Allowance] Supplement, I spend that on me. That money makes a difference. I get my skincare and my haircare stuff that I can't usually get. [...] And I know that's how my daughter feels when she gets her supplement, the [Young Carer Grant]. She says it's nice because it's like thanking me for being me.” **Client interviewee**

“The extra £40 a month came in handy because I was in a job but I’m a student now and my husband’s working but kids grow like nothing else. My daughter is dyslexic so it meant we could buy things to help her with home [schooling] because she’s not very good at that. So it did give us the ability to help her a bit more with the tools that she needs. It’s actually nice that Scotland is helping low-income families like that.” **Client interviewee**

“It was a good surprise and gave me the impression that we have a Scottish Government that’s showing care towards the citizens of Scotland. [...] I think when plans come into action then the actions speak louder than words. When politicians make promises and then, you know, they materialise, people are actually paid, people are grateful. I’m certainly grateful.” **Client interviewee**

A few interviewees said they were pleased to take part in this type of research and wanted to contribute to Social Security Scotland’s continuous improvement. They felt the research provided a chance to share their experiences and views. They said it felt good to be involved and that they would like to participate in future research.

“I’ve never been asked for my experiences, my opinions, anything by the Department for Work and Pensions or any other similar organisations. They’re like ‘we’re gonna do what we’re gonna do’...this feels sort of different. Being asked to engage in giving a response. It’s like ‘oh! Okay, this is nice’. [...] If I’d had a big grievance or if there was something that had gone wrong, this whole process would be an opportunity to tell someone which is nice, because otherwise you just wouldn’t.” **Client interviewee**

“I think it’s great that you’re looking to make sure that the services being offered are fair, reasonable and respectful. So anything that I can do with that. This is pretty much what I expected and I’m really happy to be a part of it, because I think if people know how much their efforts are appreciated by clients like me then it can only make them feel better to find out that they did really well.” **Client interviewee**

Next steps

The research findings provide insight into the experiences of Social Security Scotland clients, staff and partners during the year 2020-21. Findings from this report appear in the relevant sections of the Charter Measurement Framework report for this year. They will be fed into continuous improvement across Social Security Scotland.

The Charter Measurement Framework is published annually alongside Social Security Scotland's annual report and accounts. We will shortly begin designing next year's bespoke research with clients, staff and partners for the 2021-22 Charter Measurement Framework.

We intend to adapt next year's research based on lessons from this year. For example, we will look at options for surveying all Social Security Scotland staff instead of a sample. We will also try different research methods with partner organisations to engage a larger number of these participants next time.

Annex A: Staff Survey Respondent Characteristics tables

Table A1.1: Gender

Response options	All respondents (n=91)
Men	37%
Women	59%
Prefer not to say	3%

Table A1.2: Age

Response options	All respondents (n=92)
16 to 24	*
25 to 34	11%
35 to 44	28%
45 to 54	39%
55 to 64	17%
65 or over	0%
Prefer not to say	*

*Suppressed due to low numbers.

Table A1.3: Ethnicity

Response options	All respondents (n=92)
White groups	96%
Ethnic minority groups	*
Prefer not to say	*

*Suppressed due to low numbers.

Table A1.4: Disability

Response options	All respondents (n=91)
Has a physical or mental health condition	34%
No condition	64%
Prefer not to say	2%

Table A1.5: Grade

Response options	All respondents (n=92)
A-band	37%
B-band	38%
C-band	17%
Fast Stream	0%
Senior Civil Service	*
Other	3%
Prefer not to say	*

*Suppressed due to low numbers.

Table A1.6: Working pattern

Response options	All respondents (n=90)
Full time (37 hours a week)	79%
Part time	18%
Prefer not to say	3%

How to access background or source data

The data collected for this report:

- ☐ 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.
- ☐ cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.

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