



Social Security Scotland
Tèarainteachd Shòisealta Alba

Social Security Scotland Charter Research 2021-2022



Exploring this research

Choose how much detail you want to read:

- For findings in one page → 'Findings at a glance' on page 5
- For findings in eight pages → 'Executive Summary' on page 6
- For full findings, start at page 14

For key findings in a more visual format, a separate 'Summary report' has also been published.

Contents

Exploring this research	2
Findings at a glance.....	5
Executive Summary	6
Introduction	14
1. A People’s Service: What people said about their relationship with Social Security Scotland	18
1.1. Client Experiences of Social Security Scotland	18
1.2. Partner Experiences of Social Security Scotland	21
1.3. Staff Experiences of Social Security Scotland	27
2. Processes that work: Experiences of using the service	31
2.1. Finding out about Social Security Scotland	31
2.2. Communication preferences and needs	32
2.3. Experiences of getting in touch with Social Security Scotland	37
2.4. Making an application	40
2.5. Understanding decisions	42
2.6. Re-determinations and appeals	43
2.7. Additional support for clients	48
3. Working for Social Security Scotland	52
3.1. Knowledge and skills	52
3.2. Experiences of training and guidance	54
3.3. Support for staff	56
3.4. Communication	59
4. A learning system: Listening to feedback and making improvements.....	62
4.1. Goodwill towards improvements	62
4.2. Openness to feedback from staff and partners	62
4.3. Client involvement in the feedback process	65
4.4. Improvements based on staff and partner feedback	67
4.5. Problems with feedback – Staff	70
4.6. Problems with feedback – Partners	71

5. A learning system: Client experiences of mistakes and complaints	74
5.1. Client experiences of things going wrong	74
5.2. Staff perspectives on mistakes and complaints	77
6. Next Steps	79
7. Annex A: About the staff survey participants	80
How to access background or source data	83

Findings at a glance

The research involved interviews with clients, and surveys and interviews with staff and partner organisations about their experiences in 2021-22. Client participants said staff made them feel comfortable and trusted. Staff listened and understood their needs. Almost all said there had been no discrimination. Staff were knowledgeable and in some cases told them about other sources of support. Others described negative interactions such as disliking an advisor's tone or feeling they hadn't been listened to.

Client participants were positive about communication options and most found it easy to apply. Most found it easy to submit supporting information but a couple of participants reported issues with this. They said decision letters were clear and concise. A few wanted the letter to explain why the award was lower than expected.

Over half (57%) of partner participants rated Social Security Scotland's service as good or very good. Some mentioned problems with translation services and not being able to speak to an advisor without the client. Around two-thirds (64%) said Social Security Scotland worked well with their organisation. Comments included asking for more collaborative discussion at partnership meetings.

Most staff participants (83%) felt very confident or confident in their knowledge and skills to do their job. Training, guidance and professional experience helped them to feel confident. Some highlighted a need for further training and improved guidance. Almost all (92%) said they had good or very good support from their line manager.

Some client participants talked about mistakes in processing applications and making payments. They were pleased with how Social Security Scotland acknowledged their mistakes and apologised for errors.

Staff and partners gave examples of feedback leading to improvements to processes and accessibility. Some felt their feedback had not been listened to or actioned.

Executive Summary

This report presents results from research with clients, staff and partners about how Social Security Scotland performed in 2021-22. The research was designed to provide data for a range of measures in the 2021-22 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](#).

The research took place from February to June 2022. Alongside the findings from the [2021-22 Client Survey](#), it forms a key source of data on people's experiences of Social Security Scotland.

The research involved in-depth interviews with 18 clients from our Client Panels; a survey completed by 426 of all staff (17% response rate); interviews with 24 staff who completed the survey; focus groups with 10 Client Experience staff; a survey completed by 74 partners; and interviews with 10 partners who completed the survey.

The sections below provide the headline findings from each theme of the research. Findings from this report appear in the relevant sections of the [2021-22 Charter Measurement Framework](#).

A People's Service: What people said about their relationship with Social Security Scotland

Client Experiences of Social Security Scotland

Client participants said Social Security Scotland staff had made them feel comfortable and trusted. Staff listened to them, treated them with kindness and understood their needs. Participants felt no stigma and were treated with dignity "as a person, not just a number".

Dignity, fairness, respect.

Some client participants described negative interactions with staff such as disliking an advisor's tone or feeling they hadn't been listened to. Almost all client participants said there had been no discrimination and that they felt treated "fairly and respectfully" by Social Security Scotland.

Partner Experiences of Social Security Scotland

Over half (57%) of partner participants rated Social Security Scotland's overall service as good or very good. Around two-thirds said that Social Security Scotland is open (65%) and honest (60%), particularly about things like benefit launch and delivery. They praised Social Security Scotland's ethos and felt the service puts clients first. However, some felt it would take time for clients to build trust in Social Security Scotland and understand the organisation's ethos.

Around two-thirds (64%) of partner participants said Social Security Scotland had worked well with their organisation. Positive aspects of partnership working included enthusiastic staff, a willingness to receive feedback, and regular progress updates. There were calls for more collaborative discussion at partnership meetings. Some participants said staff turnover had affected relationships over time.

Staff Experiences of Social Security Scotland

The majority of staff participants said they were familiar with Our Charter (89%) and felt confident or very confident to deliver a service based on a human-rights system (93%). Almost all (96%) felt confident or very confident to deliver a service without discriminating against others.

Staff participants felt a genuine commitment to understanding discrimination and preventing it. Staff said internal policies and procedures, training, and personal experience had helped them feel confident about not discriminating. Participants enjoyed working for Social Security Scotland because the values of dignity, fairness and respect aligned with their personal values. Some raised concerns about whether these values were applied to staff relationships in the same way as for clients.

Dignity, fairness, respect.

Processes that Work: Experiences of using the service

Communicating with Social Security Scotland

Client participants were positive about Social Security Scotland's communication options and mentioned the different advantages of letters, text messages and web chat. They said information was sometimes easier to understand over the phone, although one client participant mentioned long wait times to speak to an advisor. Some client participants found it difficult to find and understand online information about Social Security Scotland and its benefits.

Partner participants who support clients were asked how easy or difficult they found contacting Social Security Scotland on clients' behalf. Slightly more participants said it was difficult than easy. Problems included not being able to speak to an advisor as a third party without the client. They said the service could be more accessible for clients and reported problems with the translation service and the availability of information in languages other than English.

Getting information and help from staff

Client participants said staff were knowledgeable and helpful. Participants felt staff were open and honest when they didn't know the answer to a query. They appreciated when staff went to actively find the answer. Some participants said staff provided information on other benefits or sources of support. A few wanted to be told about other benefit entitlement but had not been. Some client participants felt staff lacked knowledge about entitlement criteria or found that knowledge and helpfulness varied across staff.

Applying for a benefit

Client participants said applications were straightforward. Some had completed their application over the phone and were positive about the support they'd received from

client advisors. Most found it easy to submit supporting information but a couple of participants reported issues with this.

Getting and challenging decisions

Client participants said decision letters were clear and concise. Most agreed with the decision. A few were unhappy because the decision letter didn't explain why the award was lower than expected. One participant said the letter contained wording that put them off challenging the decision in case it resulted in a lower payment.

Client Experience staff participants described common reasons why clients have asked for a re-determination on their benefit decision. Reasons included feeling the payment was too low or thinking Social Security Scotland had not considered all available evidence. They said decisions had been changed in cases where the client supplied more evidence to demonstrate eligibility. Reasons for upholding a decision included missing the application window or not meeting the eligibility criteria.

Additional support for clients

We asked clients, staff and partners about what additional support Social Security Scotland can put in place for clients to use the service. Suggestions included: changes to application forms to include only relevant questions, extended opening hours to cover public holidays, the option to receive decisions over the phone, and the use of email as a contact method. There were many suggestions for an online portal to allow clients to monitor their applications.

Working for Social Security Scotland

Knowledge and skills

The majority of staff participants (83%) said they felt confident or very confident in their knowledge and skills to do their job.

Staff who interact with clients as part of their job (172 participants), or will do so in the future (22 participants), were asked additional questions about their knowledge. Most (71%) rated their knowledge of the social security system as good or very good. Most knew about support services (71%) and how to refer clients to these (62%). Findings showed that staff knowledge increased with length of service.

Ongoing training, the availability of guidance and their own professional experience had helped staff participants to feel confident in their knowledge and skills. Some highlighted a need for further training and improved guidance. A few found remote learning challenging and would prefer in person training. Others wanted more specific training for responding to challenging situations with clients.

Support for staff

Almost all staff participants (92%) said support from their line manager had been good or very good. Good relationships with managers and colleagues, regular organisation-wide communications and internal social channels had helped them to feel supported. Those who didn't feel supported reported issues like understaffing, workload, and inconsistencies when receiving information from managers.

Communication

The majority (88%) of staff participants said they felt confident or very confident to deliver a service based on inclusive communication. Internal training and working with the inclusive communication team had helped participants to feel confident. They said a culture of inclusiveness was embedded in the organisation in things like branding and not using acronyms. Some felt they would benefit from ongoing learning on inclusive communication.

Most staff participants (84%) said it had been easy or very easy to communicate with colleagues in a way that felt inclusive of their own needs. Participants said colleagues and managers had been accommodating and understanding about their preferences. Some described negative experiences of accessibility at work. They

Dignity, fairness, respect.

said written communication and emails were not always formatted in an accessible way. Others said internal systems were incompatible with screen readers.

A Learning System: Listening to feedback and making improvements

Openness to feedback from staff and partners

Almost all staff participants (94%) said they would speak up if there was a problem or if something wasn't working in Social Security Scotland. Participants described a culture where staff feel able to provide feedback and make suggestions.

Two-thirds of partner participants (66%) thought Social Security Scotland is open to feedback. About a third (34%) thought Social Security Scotland acts on feedback. Partner participants were positive about Social Security Scotland's culture of actively encouraging and acting on feedback. Most felt their feedback was listened to and had been told how Social Security Scotland would use it to make improvements.

Client involvement in the feedback process

A couple of client participants had given feedback to staff over the phone about issues such as Social Security Scotland's call back system. They were positive about the feedback process and felt that their feedback was taken on board.

Participants were pleased to have the chance to take part in research and discuss their experiences. A couple of client participants raised issues about giving feedback including the length of Social Security Scotland's Client Survey and a desire for face to face research.

Improvements based on staff and partner feedback

Staff feedback had led to improvements to internal communications and processes such as how work is organised and tracked. Staff suggestions also led to improvements in the client experience such as: improvements to application forms; partnership working with the Department for Work and Pensions; and working with

Dignity, fairness, respect.

policy and legal teams on benefit eligibility. Partner feedback had led to improved information and accessibility for older clients and those who use British Sign Language.

Problems with feedback

Some staff participants reported problems with providing feedback including: not knowing how to give feedback; having little or no control over making improvements; and the time taken to receive a response to suggestions or hearing no response at all. Some participants felt their feedback had not been listened to and said support was needed from more senior staff to ensure feedback was acted upon.

Over half of partner participants (56%) said they had given feedback. More than one in ten (15%) said they wanted to give feedback but didn't know how. Some partner participants shared negative experiences of providing feedback such as consultation not leading to improvements and inconsistencies with how Social Security Scotland handles feedback. Some partner participants said they felt confident about giving feedback to Social Security Scotland staff they knew well or where there was a good working relationship.

A Learning System: Client experiences of mistakes and complaints

Client experiences of things going wrong

Client participants said Social Security Scotland had made mistakes such as errors in processing applications and delays or problems in receiving payments.

Some client participants made a complaint about the mistake they experienced. Participants were pleased with how Social Security Scotland handled mistakes and complaints. They said Social Security Scotland acknowledged their mistakes and apologised for errors. In most cases participants were notified of the outcome of their complaint, although one participant was still waiting to hear back.

Staff perspective of mistakes and complaints

Client Experience staff participants said that client complaints usually related to problems with Social Security Scotland's systems. Other common reasons for complaints were long processing times and a lack of updates on applications. Participants said that improvements were needed to ensure complaints were being handled consistently and within the agreed timescales. They felt this was important in order to provide accurate updates to clients who make complaints.

Next Steps

Findings from this report appear in the relevant sections of the [2021-22 Charter Measurement Framework](#) report. They will be fed into continuous improvement activities 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 2022-23 Charter Measurement Framework.

Introduction

This report describes the findings from research with clients, staff and partners about how Social Security Scotland performed in 2021-22. The research was designed to provide data for a range of measures in the 2021-22 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 continuously improve what they are doing.

The Charter Measurement Framework is published annually alongside Social Security Scotland's annual report and accounts. It contains a comprehensive list of measures of how Social Security Scotland services are working for clients, staff and partners. Many of these involve findings from the [Client Survey](#), which goes to everyone who has applied for or received a benefit. However, some measures ask for 'examples', such as:

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

This report outlines findings from our annual bespoke in-depth research with clients, and also research with staff and partners to report on these measures. The Framework measures were taken as a starting point to develop questions for the research. Findings from this report appear in the relevant sections of the Charter Measurement Framework report for this year.

We asked participants across all strands to think about their experiences in 2021-22 (specifically between 1 April 2021 and 31 March 2022) when providing their responses. However, as some of the research took place after March 2022 we cannot guarantee that all responses referred solely to 2021-22. Some participants may have talked about experiences slightly before or after this period.

Research methods

This report presents findings from research carried out between February and June 2022. A range of methods were used across the three strands of the research.

Researchers conducted 18 in-depth interviews with Client Panel members in March and May 2022. Client Panel members are people who have applied for or received payments from Social Security Scotland. Participants in these interviews are referred to as 'client participants' in this report.

All staff in Social Security Scotland were invited to complete a survey which ran in February and March 2022. 426 staff took part, a response rate of approximately 17%.¹ Researchers conducted follow-up interviews with 24 staff between March and April. Participants were randomly sampled based on grade and division. Participants of the staff survey and participants in the follow-up interviews are referred to as 'staff participants' in this report.²

In June, two focus groups were carried out with 10 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. Focus

¹ [Social Security Scotland's workforce information for March 2022](#) shows that there were 2,445 staff in Social Security Scotland between December 2019 and March 2022. This figure has been used to determine an approximate response rate as exact staff numbers are not available for the dates when the survey ran.

² We don't identify whether quotes were from the survey or interviews to protect anonymity of staff participants whose colleagues knew they took part in an interview.

group participants are referred to as 'Client Experience staff participants' in this report.

Finally, a survey was sent to a range of partner organisations. The survey was open from mid-February to the end of April 2022 and received 74 responses.³

Researchers conducted follow-up interviews with 10 partner participants between March and May. Participants to the partner survey and follow-up interviews are referred to as 'partner participants' in this report.⁴

About the participants

Of the 18 client participants, the oldest was 68 years old and the youngest was 27. Among the participants there were ethnic minorities, a mix of men and women, people with a long-term physical or mental health condition or illness, and who had been granted refugee status to live in the UK. Participants had experience of most Social Security Scotland benefits available before 31 March 2022 except Young Carer Grant and Job Start Payment.

Around two-thirds (62%) of participants in the staff survey were women. Over a quarter (28%) were aged 45 or over. Most participants (93%) were white and around a quarter (26%) said they were disabled. Around two in five (19%) were A-Band staff, 64% were B-band, with around 10% C-band or higher.⁵ Most participants (90%) were full time staff. Full tables of the participants' characteristics are at Annex A.

The 24 staff who took part in an interview had varying levels of seniority, and there was a mix of gender, ethnicity and people with and without disabilities and long term

³ Some questions were directed only at those who directly support clients. Those questions were answered by fewer than 50 people. Due to these small numbers, the findings from these questions are referred to in the text of the report but not presented in tables.

⁴ To keep consistent with the approach with staff participants, we don't differentiate between survey and interview responses.

⁵ A-band staff are the least senior, with C-band and higher staff being most senior.

health conditions. Most had been in their current role for less than a year. All divisions of Social Security Scotland were represented among the staff participants.

The 10 Client Experience staff who participated in focus groups had varying levels of seniority. Participants were allocated to a focus group based on whether their work focused on re-determinations, internal reviews and appeals or on complaints, compliments and suggestions.

Of the 74 partner participants, 47% said that they worked with or provided support for clients or potential clients. A third (33%) said they worked in partnership with Social Security Scotland as an organisation. 19% of participants said that their organisation worked both in partnership with Social Security Scotland and with Social Security Scotland clients and potential clients.

Most partners who took part in an interview worked for an organisation that works in partnership with Social Security Scotland (7 out of 10). Two worked for organisations who support clients or potential clients. One worked for an organisation which works in partnership and also supports clients.

About the report

The report is divided into five chapters. The first chapter (A People's Service) looks at what clients, staff and partner organisations said about their relationship with Social Security Scotland. Chapter two (Processes that Work) explores experiences of applying for and receiving Social Security Scotland benefits. Chapter three (Working for Social Security Scotland) looks at feedback from staff about their experiences and delivering the Charter commitments. The final chapters (covering A Learning System from the perspective of clients and partners, and then staff) look at how Social Security Scotland listens to feedback and works with clients, staff, and partners to improve its processes and structures.

We have avoided acronyms throughout this report to make it easy to read.

A People's Service: What people said about their relationship with Social Security Scotland

This chapter looks at what people said about their relationship with Social Security Scotland. It aligns with the first section of the Charter Measurement Framework and Our Charter which sets out how Social Security Scotland should deliver a person-centred service. In particular, it looks at whether Social Security Scotland's core values of dignity, fairness and respect were reflected in client, staff and partner experiences in 2021-22.

1.1. Client Experiences of Social Security Scotland

Client participants were positive about how they had been treated by Social Security Scotland and its staff. Many had spoken to staff over the phone during their experience. These participants described how staff had made them feel comfortable, listened to them and treated them with kindness, understood their needs, and offered additional help. They said that they found staff to be caring, friendly and professional. A few client participants specifically mentioned that they felt no stigma when speaking to staff and were treated with dignity “as a person, not just a number” during their experience. They positively compared this to previous experiences and praised Social Security Scotland for putting into practice a culture based on dignity, fairness and respect.

“Absolutely brilliant, no problem at all. She asked if she could use my first name and I said yes no problem at all. Very courteous, very pleasant. I was able to ask questions and she was able to answer back to me. I would say fantastic because, we're not having to phone back, wait for a call back from somebody. Not like with the Department for Work and Pensions, it's a completely different system. You're treated like a person, not just a number, and it's made very clear you're treated as a person. Anything they can do to help. She went on to say is there anything else you need help with, is there anything we can advise you on, anything like that. Which wasn't the case but it's still nice to be offered that service.” **Client participant**

“I feel the service is much more humanised. I felt like a person and not just...before [with the Department for Work and Pensions] I always felt disregarded and some of the advisors were always dead abrupt but [Social Security Scotland] I feel is so much more person-centred and more about being compassionate. There’s more understanding and listening and that’s important for people.” **Client participant**

In another example, a client participant described how they had been treated with dignity and respect by staff during their experience of applying for Funeral Support Payment. The participant said staff were supportive and professional and were transparent about the application process. The participant felt trusted by Social Security Scotland and liked that judgements weren’t made before he supplied all the relevant information.

Participant: “Although it was a really awful time for me, I had to sort of get these things done. And the way they spoke to me. They were compassionate, yet professional. So it wasn’t promises or anything. They were being sort of transparent about what they do, what the role is, reassuring me about data protection and telling me what the journey will be like, what to expect, an indication of the time frame. And I felt like even if it was delayed that they would keep me up-to-date with everything. But it wasn’t delayed, but I just felt trust. Yeah I didn’t expect it to be so good. I speak to people about it. It’s been a while since I’ve had to claim Social Security. Years ago it was hard work and then I was really pleased with how I was treated.”

Interviewer: “You mentioned trust, did you feel trusted by staff too?”

Participant: “Yeah, I had dealings before with the Department for Work and Pensions, which is separate from Social Security Scotland, and the difference I noticed with Social Security Scotland is that they gather the information without making judgements before reviewing it... it was just to get the information that they needed, and there was no false promises. Even at the start of the conversation, they gave you assurance about the information you’re giving over, and security checks... and the way they spoke as well.”

Client participant

Although client participants commonly praised staff, some described negative interactions. One participant had spoken to a staff member over the phone about their Funeral Support Payment application and was unhappy with how the advisor had spoken to them. When asked if they felt trusted by Social Security Scotland, the participant said they felt the advisor had used a negative tone of voice.

“There was one person, it was their tone of voice. I actually terminated the call. It was the gentleman’s voice. I didn’t say that to him. I made up excuses, like they were breaking up. It was probably more me than them.” **Client participant**

Another client participant felt that they weren’t listened to or understood by a staff member. The participant didn’t make a complaint about the advisor but said it was a negative interaction and felt the staff member’s attitude didn’t reflect Social Security Scotland’s ethos.

“I just felt like I wasn’t being listened to [...] I wouldn’t go as far as to say it was discrimination but certainly I was not listened to and things I said were not correctly put on to the notes that then must have formed the decision [...] And I felt like that person, to be honest with you, I felt like that person had worked for the Department for Work and Pensions before. That’s how I felt. I just felt as if they didn’t know the ethos of what [Social Security Scotland] was trying to achieve. [...] I wouldn’t go as far as to call it discrimination but it was sailing very close to the lid.” **Client participant**

The Charter Measurement Framework states that clients should not experience discrimination. All client participants were asked whether they had been discriminated against or treated unfairly by Social Security Scotland. In the example above, the participant felt it wasn’t quite discrimination but almost.

On the whole, other client participants described feeling treated “fairly and respectfully” by Social Security Scotland. Participants said there had been no discrimination or unfair treatment when interacting with staff or using the service.

“The person was nice to speak to and I never felt like I was getting discriminated against. I just felt like it was good, I felt there was equality there. [...] My son is mixed race, Muslim and suspected autistic. [...] I think I’ve been treated fairly and respectfully.” **Client participant**

“No I don’t think so, not that I recall feeling. Even when I didn’t get [the benefit] because I’d already applied for it I just thought och I’ve been so silly, I never read it completely properly. So it wasn’t like I felt any way discriminated by that. It was just clear I hadn’t read every single bit of the small print and made complete sense of it.” **Client participant**

1.2. Partner Experiences of Social Security Scotland

Partners are people who, as part of their job, support clients to use Social Security Scotland’s services or collaborate with Social Security Scotland to inform the delivery of the service. In the survey of partner organisations, respondents were asked to rate Social Security Scotland’s service overall (Table 1).

Table 1: How would you rate the overall service delivered by Social Security Scotland?

(n=74) Column percentages

Response options	
Very good	16%
Good	41%
Neither good nor poor	19%
Poor	14%
Very poor	4%

Over half (57%) of partner respondents rated the overall service as good or very good. Around one in five (18%) rated it as poor or very poor, and a similar proportion (19%) selected ‘neither’.

Partner participants were also asked if they thought Social Security Scotland was an open and honest organisation (Table 2).⁶

Table 2: Partner participant views on openness and honesty
(n=72) Row percentages

How much do you agree or disagree with the following...:	Agree or strongly agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know
Social Security Scotland is an open organisation	65%	13%	13%	10%
Social Security Scotland is an honest organisation	60%	22%	7%	11%

Around two-thirds (65%) of partner participants said they agreed or strongly agreed that Social Security Scotland is an open organisation. Slightly fewer (60%) said they agreed or strongly agreed that Social Security Scotland is an honest organisation. Around one in ten said they disagreed or strongly disagreed that Social Security Scotland was open (13%) and honest (7%).

Partner participants described examples of when they felt Social Security Scotland had been open and honest. They said the organisation had been transparent about plans and processes for delivery of current benefits and the launch of new benefits. One participant who works in partnership with Social Security Scotland mentioned a specific example where they felt they were given a “very open and honest answer” although their query could not currently be answered. Further details on what Social Security Scotland did about this query can be found in section 4.4. Partner experiences of Social Security Scotland’s stakeholder reference groups are covered in more detail in section 4.2.

⁶ The [Client Survey 2021-22](#) presents findings on whether clients thought Social Security Scotland was an open and honest organisation.

“I think it’s been doing really well to be fair. It’s always an open and honest conversation. The two groups that I contribute to, if there’s any concerns that have been raised (not that I’ve had many), they’ve always been addressed. I’ve raised concerns around data [...]. There was a very honest comment on that, to say ‘we haven’t gathered that data, we don’t really have the systems to gather that data at the moment, but it’s something we’re going to try to address’. [...] As I say it was a very open and honest answer and I was happy with that.”

Partner participant

Similarly to client participants, partners we surveyed and interviewed praised Social Security Scotland’s values and ethos. This was common across both partners who support clients and those who work in partnership as an organisation. They felt that Social Security Scotland has built the service in a way that puts clients first. They praised Social Security Scotland for taking lived experience and partner feedback into account when delivering the service. A few partner participants were pleased about how Social Security Scotland has actively lined up their work with the Charter commitments.

“What I would say is Social Security Scotland are very communicative, positive and really very engaging with organisations to try and get the feedback. That has been really positive. They’re very keen to try to get it right. There are lessons to be learned about how the Department for Work and Pensions has delivered the service. Social Security Scotland have used that backdrop to try and take advantage of providing a service to the people of Scotland that reduces anxiety or challenges people have had during the process. I needed to provide feedback on parts, so I would go back to the people. That falls in with Charter. All the time they’ve been specific in going in line with the Charter. That’s been positive throughout. The key to getting it right. They have been trying to get opinions from a variety of user groups to take the benefits and allowances forward.”

Partner participant

“Excellent values and ethos.” **Partner participant**

Some partner participants favourably compared Social Security Scotland's approach to that taken by the Department for Work and Pensions. They felt there was more room for collaboration and that Social Security Scotland had been open and friendly in their approach to working with partners and delivering the service for clients. A partner participant who supports clients said that Social Security Scotland has been treating clients fairly and compassionately. However, they made the point that it can take time for clients to build trust in Social Security Scotland and understand the organisation's ethos.

“Social Security Scotland seem to be taking a more collaborative, less adversarial approach to the Department for Work and Pensions, and this is appreciated.” **Partner participant**

“I think it's going to be a slow process getting the type of clients we have to feel comfortable contacting [...]. The feeling from the Department for Work and Pensions benefits was people were scrounging to get them and that they were trying to catch them out and look for a loophole not to make payment. My experience with Funeral Support Payment is completely different. They're really warm and friendly on the phone and it's about trying to help [clients], making sure they can access it and not trying to catch them out and stop them accessing it. But I think it's only time, and people accessing the benefits and using them over time that they'll realise the difference.” **Partner participant**

Partner participants who had used the service on behalf of clients were asked about their experience of speaking to Social Security Scotland staff. Participants were positive about staff manner and said staff were helpful over the phone. One participant said that staff had been non-judgemental in their manner and tone of voice.

Partner participants were asked about their experience of working with the organisation (Table 3).

Table 3: How much do you agree or disagree with the following: Social Security Scotland has worked well with me and my organisation
(n=74) Column percentages

Response options	
Strongly agree	19%
Agree	45%
Neither agree nor disagree	14%
Disagree	11%
Strongly disagree	8%
Don't know/not applicable	4%

Around two-thirds (64%) of partners agreed or strongly agreed that Social Security Scotland had worked well with their organisation. Nearly one in five (19%) disagreed or strongly disagreed and 14% selected 'neither'.

Partner participants were mostly positive about their relationship with Social Security Scotland and mentioned good experiences of partnership working. Things like the enthusiastic attitude of staff; willingness of the organisation to engage and receive feedback; and regular updates on progress had contributed to partner participants feeling positive about their relationship with Social Security Scotland. In terms of improvement, there were calls for partnership meetings to have more of a focus on collaborative discussion and for updates to include a higher level of detail.

“Social Security Scotland is clearly committed to best practice in providing accessible communication and is doing well to keep partner organisations updated on progress e.g. rollout of benefits. A very positive experience in regard to partnership working.” **Partner participant**

“I've had the privilege of working in partnership with Social Security Scotland on the implementation of the devolved disability benefits (Child Disability Payment / Adult Disability Payment). This has required me to work closely with [teams in the Scottish Government and Social Security Scotland]. In all instances, I've found officers to be very collaborative and enthused about the work that they do.”

Partner participant

“Social Security Scotland’s third sector / partnership meeting group set-up and delivery has been very good. The reports, communications and meetings have demonstrated Social Security Scotland's commitment to the Charter both in delivery and context. I often speak about Social Security Scotland in meetings with officials in national government, and elsewhere, highlighting their service approach and willingness to take on board feedback and to focus on inclusive delivery of the service. The information and communications before and at meetings is extremely good and very accessible but sometimes a little short on detail and tends to be 'reportage' rather than proposals for discussion.”

Partner participant

A couple of partner participants who work in partnership with Social Security Scotland mentioned a shift in their relationship with the organisation over time. They felt that strong relationships had been built in the beginning when Social Security Scotland first started. However, staff turnover had led to the dilution of relationships over time.

“We had a really good relationship at the start but there's been some turnover with senior managers. As that turnover has happened I think things have become more dilute. We used to get new people as they were coming into post, they'd make contact with us and they'd do an awareness session or something with us. If they had new people coming into their teams, we might do a wee half hour or an hour just to help people on the road. There's been much less of that. Probably partly because we've been going through a merger. I think it's mostly because people that are coming in are not so aware. I've seen that in other organisations, things become dilute as people move on [...] It can be harder to ask for help when you don't know the face at the end of the email.” **Partner participant**

1.3. Staff Experiences of Social Security Scotland

This section presents findings on what staff said about their experience of working for Social Security Scotland in 2021-22. The survey with staff included questions about engagement with Our Charter (Table 4).

Table 4: Staff engagement with Our Charter
(n=425-426) Row percentages

How much do you agree or disagree with the following...	Agree or strongly agree	Neither agree nor disagree	Disagree or strongly disagree
I am familiar with the commitments set out in Our Charter	89%	7%	4%
I consider the commitments in Our Charter when I carry out my work	84%	10%	6%

The majority (89%) of staff participants said they agreed or strongly agreed that they were familiar with the Charter. A similar majority (84%) said they considered the commitments when they carry out their work. Very few staff participants said they were unfamiliar with or didn't consider the Charter in their work (4% and 6%).

There was positive feedback from staff about Social Security Scotland's culture. Many participants said they were attracted to joining or enjoyed working for Social Security Scotland because the values of dignity, fairness and respect aligned with their personal values. Most said their experiences of working for Social Security Scotland had confirmed that the culture reflects these values. Some raised concerns about whether the ethos of dignity, fairness and respect was applied to internal relationships and communications consistently.

**"The main reason I joined this organisation was dignity, fairness and respect."
Staff participant**

“We are given a lot of training around bias and trying to get rid of preconceptions and treat individuals with dignity, fairness and respect. What’s really reinvigorating for me is that I do see that in the interactions with clients...people genuinely do want to do their job right for vulnerable people and I’m very confident in that.” **Staff participant**

“That dignity, fairness and respect, it feels real...my only thing I worry a little about is our internal relationships...we should be treating one another with the same dignity, fairness and respect that we try and do with clients.”
Staff participant

Some staff raised concerns that Social Security Scotland’s ethos may become diluted as the agency grows. There was a concern that the culture could be undermined if new staff introduce behaviours that don’t align with Social Security Scotland’s values.

“We have team members who have come from the Department for Work and Pensions and their approach to benefits, the trust they show, varies. It’s not always consistent with the values of Social Security Scotland.” **Staff participant**

Staff participants also answered survey questions about key themes from Our Charter, including the human rights-based approach and discrimination (Tables 5 and 6).

Table 5: 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=425) Column percentages

Response options	
Very confident	36%
Confident	57%
Not confident	6%
Not at all confident	2%

Table 6: In the past year, how confident have you felt to deliver a service without discriminating against others?

(n=424) Column percentages

Response options	
Very confident	54%
Confident	42%
Not confident	3%
Not at all confident	-

Almost all staff participants (93%) said they felt confident or very confident to deliver a service based on a human-rights system. Very few (8%) said they weren't confident. Almost all staff participants (96%) said they felt confident or very confident to deliver a service without discriminating against others.

Staff participants were asked about their confidence to deliver a service free from discrimination. Participants raised a range of themes including the culture and ethos of Social Security Scotland and how this aligned with personal values, as discussed above.

"I can't stand discrimination against people in general. I think the culture here is bang on. Very inclusive for all. I think that ethos with its own staff, it's what carries onto clients. Nobody should be getting discriminated against. I have that mind-set anyway. The Scottish Government has the right idea. They seem to be an ethical employer and that's what I like. They care about people. The ethos is very much on people, and that's the way it should be." **Staff participant**

"Because we're delivering a service with dignity, fairness and respect. And I believe that everybody, regardless of anything and everything, race, creed, sexuality, gender, all the rest. It doesn't matter. We're getting people what they're entitled to. It's my own personal values so it fits with me." **Staff participant**

Staff said internal policies and procedures and training had helped them to feel confident to deliver a service in line with Our Charter and without discriminating. Participants felt a genuine commitment to understanding discrimination and preventing it. This was raised by both staff who have, and those who don't have, regular contact with clients as part of their job.

“I suppose because we've done Equality Impact Assessment, when you apply it to things you're introducing, having that at the back of your mind.”

Staff participant

“The training reiterates how seriously it is taken. Really, really reiterates. Using preferred pronouns, seven protected characteristics. If I wasn't confident in that I would be quite worried!”

Staff participant

“I have been encouraged by my manager to do some of the different training events so I signed up to a micro-aggressions training event...I thought it was quite good that I was being encouraged to do these types of training and that these types of training even exist because it's not something that's been offered in other places I've worked.”

Staff participant

Participants also mentioned a commitment from individual staff, and from senior managers, to avoid discrimination. Some staff talked about how personal experience made them feel confident to spot discrimination and avoid it.

“Years as a Trade Union rep and attending conferences and training... I've dealt with too many personal cases over the years around discrimination and a lack of inclusivity. I'm not saying by any means that I'm an expert, but I think I would have enough experience to tackle anything that I came across.”

Staff participant

2. Processes that Work: Experiences of using the service

This chapter looks at experiences of applying for or receiving benefits from Social Security Scotland. It presents feedback from clients and partners on learning about Social Security Scotland, making an application and receiving payments. This chapter relates to the second section of the Charter Measurement Framework and Our Charter. This section sets out how Social Security Scotland should deliver services which are supportive, accessible, simple, quick, and flexible.

2.1. Finding out about Social Security Scotland

Client participants reported mixed experiences of finding out about Social Security Scotland. Some found it easy to find information whilst others had difficulty finding and understanding information about Social Security Scotland and the benefits they deliver.

Client participants who found it easy said advertising, especially on social media channels, had made them aware of Social Security Scotland. Some participants said they learned about Social Security Scotland through word of mouth, from places like schools, funeral directors, and health visitors. A couple said they learned about Social Security Scotland for the first time when they received an invitation to apply. These participants found this very helpful.

“I was also aware through the media campaign. I knew that the old benefit was being replaced. I’d seen it on social media and through the grapevine.”

Client participant

“[A client advisor] phoned up and said you do know that your daughter’s entitled to it, it’s just about to run out and would I like her to put me forward for it. And I said aye, and that’s how I got it.” **Client participant**

Some participants said they didn't feel confident understanding the social security system. Some had difficulties due to confusion between Social Security Scotland and the Department for Work and Pensions. They were unsure about what each organisation delivers and didn't know who to contact for different benefits. This was especially in relation to benefits still to be transferred to Social Security Scotland.

“There's a lack of information... So if I had any problems with my Carer's Allowance... Would I phone England or would I phone Social Security Scotland? I haven't had any letters coming from Social Security Scotland saying to contact them. So I don't know where I'd contact.” **Client participant**

Partners who took part in the research also said it can be difficult for the clients they support to understand the difference between the two organisations. One partner said information on Social Security Scotland's website should make the difference clear. The participant said the information should also be accessible in languages other than English.

“...we as professionals are confused by the jargon and crossover of what the role of Jobcentres has and Social Security Scotland. So you can imagine the difficulty that people who do not know how to access this in the first place will have.”
Partner participant

2.2. Communication preferences and needs

Clients discussed a range of preferences for getting in touch and finding information. These included online, phone and letters. Some clients said they preferred using different methods depending on whether they were contacting Social Security Scotland or receiving information from them. For example, using telephone to get in touch but receiving information via letters.

In the examples below, client participants described their preferences and the advantages of different forms of communication. One participant said he trusted letters and they allowed him to get support to understand the information if needed.

Another participant said letters were helpful for clients whose first language isn't English.

"I prefer letters because I understand letters better. If I get stuck I can always ask my daughter. If they phone me...it's a lack of understanding. I might say the wrong words and things." **Client participant**

"Yes, if you don't speak English very good, or not perfect. A letter is sometimes better as you can show that to someone else. When it's online sometimes it's difficult. It's easy online if you know English." **Client participant**

One participant said text messages were good for updates but appreciated receiving a letter about the decision on her application. One participant said web chat was an accessible way for her to get in touch as it could fit round her caring responsibilities.

"I really valued that. It's good to be kept up to date with a text instead of a letter. A text is really easy, very accessible and I just felt like I knew what was happening...I'd also add getting a letter in full print was nice, I liked the fact it was in full print and colour." **Client participant**

"The web chat is a great function. From an autism mum who does it on the sly. If I use the phone it's 'who you talking to?' you know, the usual. So being able to do web chat, and I didn't have to be on the phone, it was brilliant, I got the answer I needed." **Client participant**

Telephone communication was also popular with client participants. Almost all mentioned making or receiving a call. A few participants had positive feedback about Social Security Scotland's telephony service. One participant said hearing information over the phone was easier to understand than letters. One mentioned long wait times to speak to an advisor.

“It’s not like when you phone other departments pressing button after button... When we phoned Social Security Scotland we went straight through to a person.”
Client participant

“The manager who was making the decision on my son’s case actually personally phoned me back one day because I asked to speak to her just so she could understand our situation. Because I don’t think forms and letters can always do it justice. Sometimes you need to speak about it and she was quite happy to do that.” **Client participant**

The partner survey asked about communication with Social Security Scotland (Table 7).

Table 7: How easy or difficult has it been to interact with Social Security Scotland in the ways you prefer?
(n=73) Column percentages

Response options	
Very easy	16%
Easy	32%
Neither easy nor difficult	18%
Difficult	22%
Very difficult	10%
Don’t know	3%

Just under half (48%) of partner respondents said it was easy or very easy to interact with Social Security Scotland in the way they preferred. One in five (18%) said it was neither easy nor difficult, and about a third (32%) said it was difficult or very difficult.

Like clients, some partner participants talked about long wait times getting through on the phone. They also mentioned logistical difficulties around acting on behalf of their clients where they were unable to speak to Social Security Scotland without the presence of the client.

“Not having a way to accept third party mandates to allow organisations to speak to you on behalf of clients without needing to have the client sit with you on the phone for over an hour [...] is a big issue, particularly for vulnerable clients or clients where English is not their first language.” **Partner participant**

Partner participants also raised the issue that it can be difficult to complete the required security checks over the phone when supporting a client with complex needs. This issue was also referenced by a staff participant. The staff member raised a concern about whether the identification process at the beginning of calls should be adapted to take into account clients' needs.

“We work with some of the most vulnerable client groups who have various complex needs. It has been very difficult for us to act of their behalf due to actually having to be with them to go through security which they can't always get through due to their complexities. This means that it has been made very difficult to access the correct benefits and actually get issues sorted for the client base we work with.” **Partner participant**

“[I have] concerns about the telephone security checks client advisors have to undertake. They don't seem to account for cultural differences, vulnerabilities due to mental or physical health, or address issues which affect people with no permanent address.” **Staff participant**

Partners and staff who took part in the research had suggestions to improve the accessibility of communication for clients. Examples of these included: for guidance about the document upload process to be available in different formats and for all application forms to be available in large-print.

“A client I spoke with could not follow the instructions to upload a document that we required on-screen. The client requested written instructions to enable her to upload the birth certificate we required, and requested these instructions either by email or letter...this is something I believe we should have to make our service more fully inclusive.” **Staff participant**

“I had an occasion where a client had asked for large text but the only appointee declaration was in regular sized text.” **Staff participant**

Partners who support clients and potential clients raised concerns about the availability of information to clients who use languages other than English. One partner participant encountered problems with the translation service offered by Social Security Scotland. One participant raised concerns on behalf of clients who are hard of hearing or Deaf.

“The translation service is not very good and Social Security Scotland staff don't seem to understand how to access a translator for non-English speaking customers.” **Partner participant**

“Working with British Sign Language users is an issue with language barriers. Understanding letters is not clear for British Sign Language users as their language is visual. I [know] one client who is having issues with making contact through Contact Scotland due to staff not being aware of the service, and also the [...] queue for clients has been very poor with waiting with the interpreter on line. [They had] been waiting four hours on two calls, one was cut off and the other was a lot of confusion with the client. To improve this, Deaf awareness should be given to explain the difference between a British Sign Language user and a hard of hearing person. I'm seeing Deaf clients being frustrated and [getting] upset.” **Partner participant**

Several partners who took part in the research said non-digital communication methods were vital for clients who don't have regular access to the internet. They emphasised that paper- and telephone-based communications were essential to allow these clients to access and use Social Security Scotland's service.

“The 60 plus, 70 plus, they’re more switched on about using a tablet or an iPad, venturing online. The senior adult, no. That’s who we help. I would do it online with their permission. I’ll be beside them. Obviously the past two years it’s just been over the phone... For example, I had a gentleman this morning, his partner just died, he’s 78. He’s not got the ability to go online, and he’s not got the hearing ability to go on the phone. I was doing it online via the phone with him.”

Partner participant

“It is not always easy for people to access and use digital platforms - they may not have kit, data credit or Wi-Fi and can’t always access libraries or shared internet spaces. ALL claimants should be asked if they need help with digital inclusion/access and more should be done to ensure this.” **Partner participant**

One participant who had applied for Funeral Support Payment said there should be options for submitting copies of supporting information by post for clients who don’t have access to technology or the internet.

2.3. Experiences of getting in touch with Social Security Scotland

Client participants were asked about their experiences of getting in touch with Social Security Scotland and whether staff were able to help them. Client participants were positive about staff and said they found staff to be knowledgeable and supportive in assisting them to use the service. Participants gave examples of times when staff had been knowledgeable.

“She had a lot of information. She knew what she was talking about. I always think when we phone up these departments, like the Department for Work and Pensions, they don’t know what they are talking about, [they use] lots of jargon. She had lots of knowledge and talked to you like you were a person.”

Client participant

“...they were very friendly and knowledgeable about what I had to do. They didn’t have to go ‘well I don’t know’ and go and ask somebody else. They knew what they were speaking about. I suppose this is new for all of you. You haven’t had to deal with this before, with it just being changing.” **Client participant**

Client participants described openness and honesty in terms of Social Security Scotland being clear about their services and processes.

“I didn’t know that benefit existed. They were explaining what the benefit was, what it covers, and you could tell they were following the rule book. And it was in a good way, because with these types of calls it’s important to have black and white rather than grey areas. It was good for me because they were being open and honest and transparent, and not giving me any false expectations. The way they spoke, they were so knowledgeable. They explained the process, how it would be, how they gathered the data. It was world class.” **Client participant**

Participants were happy when staff highlighted other sources of support or signposted them to the website for information on other benefits. Some participants wanted the advisor to tell them about other benefit entitlement but didn’t get this.

“She advised to also look on the website because there were other benefits I could also get.” **Client participant**

“Because [the advisor] didn’t say, we didn’t know there was something other than Best Start Grant. I was trying to help friends by going online but it’s not really clear who can apply for what.” **Client participant**

Client participants were pleased when staff were honest when they didn’t know the answer to a query. Participants felt this was open and transparent, and they appreciated when staff went to actively seek out the answer for them. Some participants understood that it wasn’t always possible for staff to find an answer to their query, but were pleased that staff were honest about it.

“They’ve been able to answer questions, and if there was something that they weren’t quite sure of, especially at the start with the payments and whatever else, the girl was like ‘I’m not quite sure but I’ll phone you back’. It wasn’t like ‘oh I’m not quite sure’ and that’s the end of it. It was ‘I’ll seek further information, I’ll find out for you, or I’ll speak to the relevant person and call you back’. She was really good. Ownership was taken [...] which was great because you knew that you were heard.” **Client participant**

“I contacted to ask how long it would be. Then the guy I called rang me and said he was sorry he didn’t know how long it would be. That was good, that he did that, that he was honest about that. The communication was good.”
Client participant

Some client participants felt staff could have been more knowledgeable or helpful. They felt staff didn’t know enough about benefit entitlement, didn’t offer enough detailed information about applying, or didn’t go over and above to answer queries. Some participants had mixed experiences with different members of staff, finding that some were more knowledgeable and helpful than others.

“Probably the first one I spoke to wasn’t overly knowledgeable as she just said if we weren’t getting benefits then we wouldn’t be entitled to anything. [I said] I thought there was a payment that everyone got [...] which was quite an open question. For her to not say ‘oh that might be worth looking into’ I went on the information I was given. I didn’t know any better so I’m hoping that the staff would be able to tell me.” **Client participant**

“She seemed to understand the service inside out which was good because she was telling me things I hadn’t been told before, things I didn’t know, things I think I should’ve been told in the first phone call.” **Client participant**

Partner participants also shared their experiences of getting in touch with Social Security Scotland on behalf of clients. Partners who directly support clients were asked how easy or difficult it had been looking up or making contact with Social

Security Scotland with or for clients, and going through the application process with or for clients. The number of responses was low for this question, but for both questions slightly more respondents said it was difficult than said it was easy.

The partner survey also asked partners who work with clients to rate their experience of speaking to Social Security Scotland staff. Again, numbers were low, but were evenly split between those who rated it as good or very good and those who rated it as poor or very poor. Finally, these partners were asked how accessible the service was for clients. Around one in five said it was very accessible, about half said it was somewhat accessible, and around a quarter said it was not at all accessible.

Partner participants said that staff were pleasant but felt they lacked sufficient knowledge to help partners use the service for clients. They felt that staff were poorly informed and could be better trained.

“The helpline staff are very friendly but poorly informed/trained.”

Partner participant

2.4. Making an application

In their interviews, client participants were asked about their experience of making applications. Feedback from most participants was positive. Key themes were that applications were straightforward and submitting supporting information was easy to do. This was echoed by a partner participant who supports clients to make applications.

“I knew it was going to be a lengthy form and to be fair it let me put across how my normal life was different to a neurotypical mum’s. You know, a child’s normal life. So that was really good.” **Client participant**

“Really easy, really accessible. From just a Google search it came up straight away. The website was clear and explained things. The application process, which I was really dreading... the questions were really easy to understand and gave you prompts. It wasn’t repetitive. Some other benefits that I’ve looked at before for other people, it was repetitive, and almost feels like trick questions to get people to say different things. But it wasn’t like that. It was really straightforward, simple, it was easy. I was pleasantly surprised.”

Client participant

“On behalf of my customers I find that the information and applications are easy to access and very user friendly.” **Partner participant**

Client participants generally said they were able to complete an application in a way that suited them. For example, online or over the phone. There were examples where participants had been supported by Social Security Scotland to complete applications or provide supporting information. The feedback about the help received from client advisors was very positive.

“The application was simple, totally straightforward. I did it sitting up on my laptop at 4 in the morning, and at ten past 8 in the morning I had a text message saying ‘we’ve received your application and somebody will be in touch with you for any further information required’. Then I got the phone call the next day saying ‘this is what we need’. So that part of it was really easy, quick and speedy.”

Client participant

“I got in contact and I spoke to the girl and she said ‘right, because you’re phoning me today, if you’ve time we can go over the first part’, you know, doing your name, address, that kind of thing in the phone call. So that was fine, we did all that and then she asked if I had any issues filling in forms. I’m actually dyslexic, so she then said ‘well that’s fine, I’ll send you out the form but I can schedule someone to phone you’. So somebody phoned me and he filled out the form for me. That was really helpful, getting someone else to fill it in... It was a video call and it was an hour. He was on his computer and he was speaking to me as well as typing it all in for me. That was really good.” **Client participant**

2.5. Understanding decisions

Overall, experiences of receiving and understanding decisions about applications were positive. There was praise for letters from Social Security Scotland with participants calling them clear and concise. A couple of participants with experience of Child Disability Payment particularly appreciated the wording and the tone of the letter they received.

“Yes, [the letter was] straight to the point. There wasn’t a big preamble, it’s on the first page. And it was a really clear and detailed report as well, you could look at that on how they came to their decision... I felt like they had read what I had submitted, it felt like there was care and kindness taken to come to that decision, and that they had actually listened... It felt like I was believed, and in that sense it made me feel valued.” **Client participant**

“[The letter] was precise, it was clear and precise. It told me exactly how much and when it was paid, and that was it. It said this is the Social Security Scotland Carer’s Allowance Supplement payment your daughter is entitled to, you will receive it twice a year if you receive Carer’s Allowance with a disability within the higher rate, and that’s what it was.” **Client participant**

“What I really did like about it, to be honest, as much as it was addressed to me it spoke about [my son]. It said ‘[my son]’s payments will...’ and ‘[my son]’s award is for...’ so it was very personal. I knew that it was about my child. It wasn’t generic, to me it was more personalised, and I like that, especially as it was about my son, it was about my pride and joy. That stuck out to me by saying that my wee man was a person and not a number... There wasn’t jargon. I didn’t need to look up a thesaurus to work out what that word means. It was all very easy reading, and how the decision was made.” **Client participant**

One partner participant said that decisions could be better communicated to funeral directors. The participant said that it was difficult to tell which clients had been successful when payments arrived from Social Security Scotland.

“When Social Security Scotland pays money into the funeral directors bank account it appears by magic. No warning by email or letter. Only an initial and surname against it and most names can be duplicated so how can I tell who is being allotted the benefit? More communication is needed between all parties. Otherwise a good, robust and reasonably fast system.” **Partner participant**

2.6. Re-determinations and appeals

If clients are unhappy with the decision on their application they can ask Social Security Scotland to look again at what they've decided. When a client requests this, the application is reviewed again by a separate team. Clients have the right to appeal to the Social Security Chamber of the First-tier Tribunal for Scotland (the Tribunal) if they do not agree with the new decision after a re-determination. The Tribunal is not part of Social Security Scotland. Appeals can be requested for all benefits except Best Start Foods and Job Start Payment.

Client participants were asked about challenging decisions on their benefit applications, and their experiences of re-determinations and appeals. Most participants we spoke to said they agreed with the decision on their application. One participant was happy with their decision but felt the wording in the letter could discourage other clients from challenging their decision. The letter stated that challenging the decision could result in a lower payment. The participant said they wouldn't have challenged the decision if they had disagreed with it due to worry over losing the benefit.

“It just went through his name and what he was entitled to and what level he was on. Then it went on to say that if you weren't happy with this decision you could dispute it. I think it said if you dispute it it could result in less payment. I think sometimes it does. It didn't scare me, I knew he wouldn't get the higher payment, but I think some people would be scared to dispute just in case [they] would stop your money.” **Client participant**

One participant who applied for Funeral Support Payment said it was unclear why she hadn't been given money for death certificates. The participant said a more detailed explanation would've helped make the reason behind this decision clearer. They felt there was no point challenging the decision as the amount was minor but they were unhappy about not being told why the award was lower than expected.

Participant: "Clear, but I was confused. On the call [the client advisor] said you'd get money for the death certificates but on the form it said 'Death Certificates, zero' when I'd got two death certificates... Not that it really matters because they were £10 each so just brush it off and ignore it... [The letter] could've said why. That way I could've assessed whether it had even been put into the equation or not to begin with... For all I know it was omitted by accident. I just assumed it was a case of 'you're not getting it'."

Interviewer: "Would you have challenged it?"

Participant: "Maybe but I might not bother for £20."

Client participant

We asked Client Experience staff participants about some of the main reasons why clients have asked for their decision to be looked at again. Reasons differed by benefit type, although some reasons were common across benefits. These included clients believing they were entitled to more money or a higher rate of benefit or thinking Social Security Scotland did not consider all available information at the application stage. Another common reason was clients not being able to provide all the necessary evidence with the application but the evidence then becoming available to the client after the application stage.

For benefits involving children (such as Best Start Grant and Scottish Child Payment), clients had asked for a re-determination in cases where they were responsible for the child but were not deemed the responsible party in the original decision. For Best Start Grant specifically, reasons for re-determination included applying outwith the application window (either too early or too late) and confusion about criteria such as the age of the child or the stage of pregnancy.

Dignity, fairness, respect.

“If the child is deferred some people think they apply when the child actually goes to school but it’s the age they go by, not when they go to school. So there’s lots of re-determinations on that but sometimes it’s too late.”

Client Experience staff participant

Client Experience staff participants also mentioned reasons for re-determinations on Funeral Support Payment applications. Clients had asked for re-determinations in cases where their application had been denied because of a lack of evidence that the client and the deceased were normally resident in Scotland. Clients had also asked for the decision to be looked at again where the payment amount was lower than they had expected.

“If the client has the funeral outside of the deceased’s local authority and it costs more than the funeral in the local authority area, then we will pay for the cost in the local authority rather than the other way. We had one where someone [requested a] re-determination as they thought they should be paid more.”

Client Experience staff participant

Re-determinations have also been requested in cases where an application was denied for identity and verification reasons. This can happen across different benefits, but Client Experience staff participants gave an example related to Child Disability Payment where the verification can be missed due to missed appointments leading to a denial decision.

“In Child Disability Payment there is a full section on identity and verification that clients need to go through, and that can end up being completely missed because appointments need to be made, appointments get missed and it gets denied on that basis. Then we have to do the re-determination on the basis that they were denied on identity and verification reasons.”

Client Experience staff participant

Client Experience staff participants were asked for some examples where decisions had been changed following re-determinations in the past year. They said decisions had been changed in cases where the client supplied more evidence or information to show that they were eligible for the benefit.

“A Child Disability Payment client was initially awarded nothing. They put in a re-determination and provided more information like NHS letters and testimonies from the health visitor. So loads of additional information. They ended up being paid the highest and higher. The new information helped make the decision fairly straightforward.” **Client Experience staff participant**

Decisions have also been changed in Scottish Child Payment competing claims cases where it became clear which client was responsible for the child. Re-determinations on these cases had led Client Experience staff participants to review the evidence again in order to gauge who is responsible for the child and to change the decision depending on who the responsibility lies with.

“I had one that was a Scottish Child Payment competing claims case. The client had applied for their child but they were told it was paid to someone else. I had to look at that and see who was really responsible for the child. We looked at information to see who was responsible and I spoke to the Department for Work and Pensions. They were able to tell me who had the responsibility on their end. So I was able to award the parent and I had to stop the award for the other party.” **Client Experience staff participant**

Client Experience staff participants said missing the application window and not meeting the eligibility criteria were some of the main reasons why decisions had been unchanged following re-determinations. Some clients weren't aware they needed a qualifying benefit in order to be eligible for certain awards such as Funeral Support Payment. Participants also mentioned instances when Job Start Payment clients were ineligible for the benefit due to receiving earnings within the six months prior to applying.

“You see that a lot with Job Start Payment. They have put in an internal review to be looked at again but they’ve had earnings in the last six months. We have a system where we can check their earnings. So we phone the client to double-check. If they say they didn’t have earnings we ask them for evidence. But if they don’t provide evidence, or they say they did have earnings, then unfortunately the decision wouldn’t be changed. It is very black and white if they don’t meet the criteria.” **Client Experience staff participant**

Client Experience staff participants were asked how they felt the re-determinations process had been working overall. Participants thought the re-determinations process has been fairly positive for clients. They felt being able to speak to clients directly over the phone during a re-determination had helped to make the process personal and informative for clients.

“I think on the whole clients find it a good process. Particular because we send a letter to the client and we can contact clients [over the phone] and explain things to them fully. [...] Clients find it quite a positive experience regardless of the outcome if you explain the decision and the reasoning behind everything. We have the autonomy to do that.” **Client Experience staff participant**

Client Experience staff participants said appeals had been rejected in cases where the decision made at the re-determination stage was found to be correct. They said appeals were commonly rejected for the same reasons as re-determinations: the client missing the application window or not meeting the eligibility criteria for the award.

We asked Client Experience staff participants for some examples where decisions had been changed following an appeal. Participants said there had been occasions where it became clear during an appeal that the guidance for making benefit decisions didn’t match up with legislation for a particular benefit. In one example about Funeral Support Payment, the Client Experience team became aware of an inconsistency between guidance and legislation following an appeal. The guidance

was amended and used by the team to review other Funeral Support Payment cases that had previously been denied.

Another example where a decision was changed following an appeal was when a payment was made to the wrong client. Social Security Scotland acknowledged the mistake and awarded the correct client. They then issued a letter to the wrongly paid client to explain the situation and reassure them that they wouldn't be recovering the money.

“There have been times when appeals have happened and it's meant a policy change [...] There were a few Funeral Support Payment cases where it became apparent that the guidance didn't match up with the legislation. We identified 900 or so cases that had been denied. We did a scan of all those cases to see if they would be eligible under the new interpretation. We ended up paying 30 or so of those people.” **Client Experience staff participant**

2.7. Additional support for clients

Staff and partner participants mentioned a range of ways communication and information for clients could be improved. This included changes to application forms to make sure only relevant questions are included. Another example was from a partner who said Social Security Scotland's opening hours should be extended to cover public holidays.

“Questions [in] part 2 of the Child Disability Payment application were not applicable for children under 14 months of age. The questions for children above 14 months are applicable, but when you're asking a mother does her 4 month old baby brush his teeth, hair or get themselves dressed it feels silly to ask those questions. As a new organisation I feel it's necessary to feed this information back to my managers as ultimately it will improve the client's customer experience...We have the knowledge and technology to change anything in this organisation which would make the application process for that specific age group a bit smoother, and would also help the parents or guardians have the confidence to fill out the application themselves online as the person I spoke with said she did not have the confidence to attempt the application as she felt the questions were not applicable to her child.” **Staff participant**

“...as a bereavement industry, the Scottish Government often asks us to make ourselves available to make sure that death and funeral move through their process timeously and that we don’t cause unnecessary delays. So during COVID-19 we had registrars out seven days a week, the burial and crematorium teams were working seven days a week and yet Social Security Scotland shut down to close for every holiday. We don’t close for four day holidays, we open for one of them. We’ll be open on Good Friday because a four day shutdown for funerals and bereavement as a service is too much.” **Partner participant**

There were also suggestions about further ways for clients to access information about their applications. One staff participant said clients would appreciate hearing decisions about their application over the phone.

“Clients are constantly stating they would like to be told over the phone what the decision is on their application as opposed to waiting on the award letter.”
Staff participant

There were many suggestions for an online app or account to allow clients to monitor the status of their applications and review their application history. The importance of updates and timescales to clients was discussed in section 2.1 above. Both staff and clients said that an online account would help facilitate this.

“Having clients being able to make themselves an account on our website so that when they submit an application they can regularly check the progress of the application, and we as advisors can leave notes on the application that clients can see. For example when we need further supporting documents uploaded. It would help with the volume of calls massively.” **Staff participant**

“What I thought at the time would be quite good is if you had an account you can log in to apply and that way you can see what you’ve already applied for. Because I’d applied for the wee one’s nursery but I had done the wrong application for it so I then had to do another application.” **Client participant**

There was also a number of suggestions for email to be included as way for clients to get in touch with Social Security Scotland. Reasons email would be helpful focused on accessibility and convenience for clients and partner organisations who support them.

“People have asked to be communicated with by email. But we can’t email people. Some people don’t want to see people face to face, there’s people who have anxieties about it. Others say I don’t want a letter coming in the post, I don’t want that.” **Client Experience staff participant**

“Call wait times are excessive and there is a lack of options for contacting in other ways. In particular, email is essential to enable effective working with intermediaries acting on behalf of people claiming. We have high demand for the service and it is not possible to sit on the phone for 45 minutes with every person we support.” **Partner participant**

“An email would have been handy [to ask a question] or an online form. I don’t know if that’s a thing already.” **Client participant**

There were a couple of further suggestions for additional support for clients that weren’t related to communications. These were: a way to make the identification process easier for clients with experience of domestic abuse and making payments into multiple bank accounts.

“I have provided feedback in relation to individuals fleeing domestic abuse and the identity process as not everyone has the correct documentation if they are fleeing a situation. As of yet there has been no update to the process. If we could accept other forms of documentation such as letters from a solicitor or domestic abuse agencies to help with identification, this would allow the applications to be considered and not cause additional delays in having to wait for evidence of identity letters being sent out.” **Staff participant**

“Clients have to have their benefits all paid into the same bank account. There are good reasons why people might not want to do this. This issue has been raised but so far nothing has been done.” **Staff participant**

3. Working for Social Security Scotland

This chapter looks at feedback from staff about their experience of working for Social Security Scotland in 2021-22. Section 1.3 considered how staff felt about Social Security Scotland’s culture and their confidence to deliver the Charter commitments. This chapter looks at: staff knowledge and experiences of training; how supported staff have felt and if additional needs were met; and experiences of communication.

3.1. Knowledge and skills

This section looks at staff confidence in their knowledge and skills to do their work. All staff were asked how confident they felt in their knowledge and skills (Table 8).

Table 8: In the past year, how confident have you felt in your knowledge and skills to do your job?

(n=425) Column percentages

Response options	
Very confident	24%
Confident	59%
Not confident	16%
Not at all confident	2%

The majority (83%) of staff participants said they felt confident or very confident in their knowledge and skills to do their job. Around one in five staff participants said they were not confident or not at all confident (18%).

Staff who interact with clients as part of their job were asked additional questions about their knowledge. 22 staff respondents who will interact with clients in the future were also asked these questions. Firstly, they were asked to rate their knowledge of the social security system (Table 9).

Table 9: How would you rate your knowledge of the social security system in Scotland?

(n=194) Column percentages

Response options	
Very good	20%
Good	51%
Neither good nor poor	26%
Poor	4%
Very poor	-

Most (71%) rated their knowledge as good or very good. Around a quarter (26%) said neither good nor poor. A small proportion (4%) rated their knowledge as poor. Responses indicated that staff knowledge increased with length of service.

Staff who interact with clients, or will in the future, were also asked about their knowledge of advocacy and advice services for clients (Table 10).

Table 10: How much do you agree or disagree with the following...

(n=193-194) Row percentages

How much do you agree or disagree with the following...	Agree or strongly agree	Neither agree nor disagree	Disagree or strongly disagree
I know about a range of advice and advocacy services that are convenient for clients	71%	14%	15%
I know how to refer clients to advice and advocacy services	62%	18%	20%

Most participants said they agreed or strongly agreed that they knew about support services (71%) and how to refer clients (62%). Positive responses were higher for knowledge of services compared to knowing how to refer clients. One in five participants said they disagreed or strongly disagreed that they knew how to refer clients to advice and advocacy services. Again, responses indicated that staff knowledge increased with length of service.

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Staff who interact with clients, or will in the future, were also asked about their knowledge of the re-determinations and appeals processes (Table 11).

Table 11: How much do you agree or disagree with the following...
(n=193-194) Row percentages

How much do you agree or disagree with the following...	Agree or strongly agree	Neither agree nor disagree	Disagree or strongly disagree
I know enough about the re-determinations process to explain it clearly to clients	55%	20%	24%
I know enough about the appeals process to explain it clearly to clients	48%	21%	31%

Around half of participants said they agreed or strongly agreed that they knew about the re-determinations (55%) and appeals (48%) processes. Around a quarter (24%) disagreed or strongly disagreed that they knew enough about the re-determinations process. Just less than a third (31%) disagreed or strongly disagreed that they knew enough about the appeals process. Again, responses indicated that staff knowledge increased with length of service.

3.2. Experiences of training and guidance

Staff participants said ongoing training, the availability of guidance and their own professional experience had helped them to feel confident in their knowledge and skills. Examples of training included online learning, job shadowing, self-directed learning, workshops and seminars, and support from managers and colleagues. Training covered things like: diversity and discrimination, inclusive communication, understanding benefits and Our Charter, and using internal systems. Some said the initial training they received when they first joined Social Security Scotland had helped them to feel confident, well trained and prepared for their role. Participants appreciated that training about benefits had focused more on clients and their needs rather than being purely process-based.

“It was a thorough induction. We had about 6 weeks of training before starting the job which was really good. We had role play, case studies to do, job shadowing. A variety of different ways to get us ready for the job.”

Staff participant

“There hasn’t been an over-focus on processes. It’s been more about people and what lies behind the benefits. For example, Funeral Support Payment training has not been purely about the money and the mechanics of the benefit. It’s something that would involve bereavement and people in a particular position in life. That’s been good. The eLearning itself has been good. It’s generally been well written and well structured.” **Staff participant**

Some staff participants mentioned a need for further training and improved guidance. They said that guidance was difficult to navigate and incomplete in places. This had affected staff confidence and made it difficult for staff to follow processes effectively. They felt it would be helpful if guidance and best practice was formalised and shared in a more structured way, rather than through word of mouth.

“I think the guidance could be greatly improved as it can be difficult to find the correct information and information is lacking in certain areas. The letter process can be confusing and templates can be hard to find. I’ve found a lot of workarounds are found through word of mouth but I think best practice should be shared more often through bulletins or daily meetings so that everyone is clear on what should be done.” **Staff participant**

A few participants found remote learning challenging and would prefer in person training. Some raised a need for more specific training to help with responding to unique or challenging situations, particularly when talking to a client on the phone or doing a home visit. They felt more one-to-one training or job shadowing could help with this.

“The training was done on a remote basis. I would have preferred being able to sit down next to someone and literally shadow them doing the same job. Having the chance to see a few different situations that come up. That wasn’t possible because of the pandemic and because it was a very new benefit so there wasn’t a way to show people before we started. I feel a bit lost when something doesn’t work the way I expect it to.” **Staff participant**

“I think that maybe in the Local Delivery training they should focus a bit more on the situation when you’re in somebody’s house, when you’re doing a visit. What if they get really upset? Because they didn’t really cover that. It was more about the technical issues and signposting. Nothing about how to handle a difficult situation.” **Staff participant**

3.3. Support for staff

This section looks at how supported staff felt at work. All staff were asked to rate the support they’d had from their line manager over the past year (Table 12).

Table 12: Thinking about the past year, how would you rate the support you’ve had from your line manager?

(n=424) Column percentages

Response options	
Very good	67%
Good	25%
Neither good nor poor	5%
Poor	3%
Very poor	1%

Almost all staff participants (92%) said the support from their line manager had been good or very good. Only 4% of participants said support had been poor or very poor.

Staff participants talked about what had helped them to feel supported at work. They highlighted support from managers and colleagues. They felt comfortable going to others for help or to ask questions, no matter the level of seniority. Participants also

felt supported by Social Security Scotland more widely thanks to regular organisation-wide communications and internal social channels.

“My line manager has been a great support for answering questions and pointing me in the right direction. I’ve had things going on in the house so she’s been a really good support. Even higher up the chain as well, I’ve found it doesn’t seem to matter what level of seniority they were. If you’ve got a question, you can go and ask them. For example I needed to go to someone senior to ask for something that I needed. And they were like ‘yeah, no problem’. In my last job, if I’d have went to the equivalent they would have gone ‘that’s not my job’. So basically [I’m supported by] everybody in the team, and my manager, and her manager.” **Staff participant**

“I think the wider support that Social Security Scotland has provided has been quite good. There’s been quite a lot of regular communications about different things and about areas of support that they have, like wellbeing. And even little things that do make a difference, like the Yammer pages about festive quizzes or things to do with your teams, like icebreakers, which I think are really important and takes a lot of the pressure off of individual teams to create some of those informal conversations. I think that’s all been beneficial and I’ve not experienced that before. So that was good.” **Staff participant**

For staff participants who reported not feeling supported, issues were about understaffing, workload, fairness in recruitment, problems with internal systems and inconsistencies when receiving information from managers.

“My line manager has been very understanding. I don’t feel afraid to ask questions or for advice or support. But I’ve also noticed a bit of inconsistency in how line managers interact with their teams or manage certain problems. Information can get to different teams at different times. A lot of the time when I’m finding out something important it’s through other colleagues but I’m not finding out from my manager for quite a while. We should all get the information at the same time.” **Staff participant**

“We are severely understaffed at the moment and every team member has a long list of tasks to be done every day that is expanding all the time, plus telephony/web chat duties. We are paid lower level salaries when we have all this workload and are in a position to make decisions on applications, which is not fair. Due to our extreme workload we cannot possibly attend to everything on time, meaning we are two months behind processing and clients are justifiably frustrated and taking it out on telephony and web chat agents. We need more staff and a better distribution of labour so that we are more efficient and manage to pay clients on time. Also, our [internal system] is full of errors, counter-intuitive and many times shows the wrong data.” **Staff participant**

The survey also asked staff if they’d had any additional needs or requirements at work. Around a quarter said yes and almost all told someone about their needs. Most said they got what they needed.

In the examples below, participants described the ways in which their additional needs and requirements had been met. This included the provision of additional equipment to aid working from home and support related to caring responsibilities and wellbeing.

“I got diagnosed with [illness]. I took a panic one day that my desk set up was not right. I got in touch with the Health and Safety Manager about different things at home like my monitor and desk set up. They were really helpful in terms of getting that set up. They did that quite quickly, which was helpful.”
Staff participant

“I had to take some time off [for caring responsibilities and for bereavement]. As soon as I came back to work, my manager was like ‘you don’t have to have your camera on in meetings if you don’t want to speak’. But she said feel free to send her an email afterwards if there has been anything that day that’s been said that’s upset me, or if I’m feeling a bit low. The ironic thing was I didn’t actually need to do any of those things - just knowing I could, just knowing that support was there made all the difference. When I did return to work it was a staged return. And I didn’t need to worry about work or anything like that. Just knowing I had that support behind me. It made all the difference.” **Staff participant**

3.4. Communication

This section looks at staff experiences of communication. All staff participants were asked how confident they felt to deliver a service based on inclusive communication (Table 13). In this context, ‘delivering a service’ means the services staff deliver to colleagues, clients and partners and the way they do their jobs.

Table 13: In the past year, how confident have you felt to deliver a service based on inclusive communication?

(n=425) Column percentages

Response options	
Very confident	27%
Confident	61%
Not confident	10%
Not at all confident	2%

The majority of staff participants (88%) said they felt confident or very confident to deliver a service based on inclusive communication. Around one in ten (12%) said they felt not confident or not at all confident to do this.

Participants said internal training on inclusive communication and working with the inclusive communication team had helped them to feel confident. They also felt that a culture of inclusiveness was embedded in the organisation. This was evidenced by things like organisational branding and by Social Security Scotland actively discouraging the use of acronyms and jargon in all communications. Some mentioned that while they felt confident, they were concerned about continuing to communicate with others in an inclusive way without making assumptions or becoming complacent. They said there should be ongoing learning and training about inclusive communication to avoid this.

“I think the training has better equipped me to communicate and there’s probably things that I could still learn but I feel relatively confident in doing that.”

Staff participant

“We’ve recently had the Inclusive Communication team come along to our own branch and deliver a presentation and we’re going to actively work with them moving forward.” **Staff participant**

All staff participants were asked how easy or difficult it had been to communicate with colleagues in a way that felt inclusive of their own needs (Table 14).

Table 14: In the past year, how easy or difficult has it been to communicate with colleagues in a way that feels inclusive of your needs?
(n=424) Column percentages

Response options	
Very easy	45%
Easy	39%
Neither easy nor difficult	8%
Difficult	7%
Very difficult	-

Most (84%) staff participants said it had been easy or very easy to communicate in a way that felt inclusive of their own needs. Very few said they found this difficult (7%).

Participants were positive about being supported to communicate in the ways they prefer. They said that colleagues and managers had been accommodating and understanding of their preferences. Some mentioned times when they hadn’t been able to communicate in the ways they need or prefer. Examples were: written communication and emails not formatted in an accessible way or internal systems that are incompatible with screen reader technology.

“I express better in writing. And my manager has been very accepting of written communication so it hasn’t been an issue.” **Staff participant**

“Improvements need to be made to our systems to make them accessible. For example, several main systems such as [internal record system] are not accessible for [screen readers]. I have taken this forward with several people and hope that some improvements can be made.” **Staff participant**

Participants also raised a need for better internal communication and collaboration across teams. Examples included improving communication between colleagues to better support the progress of technical requests, and more collaboration between teams working on similar benefits.

“We would benefit from a closer relationship with other teams dealing with Child Disability Payment. There are gaps and conflicts in procedures and guidance between Client Advisors, Local Delivery, Case Managers and Case Transfer.” **Staff participant**

4. A Learning System: Listening to feedback and making improvements

The final two chapters look at how Social Security Scotland listens to feedback and works with clients, staff, and partners to improve its processes and structures. The chapters also include actions taken by Social Security Scotland to respond to and address feedback. These themes reflect the third section of the Charter Measurement Framework and Our Charter which says Social Security Scotland's service should learn from and improve based on feedback.

4.1. Goodwill towards improvements

Although many of the people who took part had suggestions for how things could be improved, there was a strong sense of goodwill towards Social Security Scotland. Many appreciated the problems that can arise when delivering a new service on the scale of Social Security Scotland. Many were supportive of the agency's ambitions and were sympathetic to mistakes for this reason.

“Those types of wee mishaps, and that's what I said to the [client advisor], Social Security Scotland to me is still a new identity. It's still quite new.”

Client participant

“I understand that there are teething problems, and we can hopefully feed back and things can change.” **Staff participant**

4.2. Openness to feedback from staff and partners

This section presents findings about how staff and partners feel about giving feedback. It also considers how open Social Security Scotland is to welcoming feedback and using it to make improvements.

Staff participants were asked if they would speak up if there was a problem in Social Security Scotland (Table 15).

Table 15: 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=425) Column percentages

Response options	
Strongly agree	47%
Agree	47%
Neither agree nor disagree	4%
Disagree	2%
Strongly disagree	0%

Almost all staff participants (94%) said they agreed or strongly agreed that they would speak up if there was a problem. Only 2% of participants said they disagreed.

Some staff participants also left comments about their experience of feedback and improvement. There were more positive than negative comments about how feedback is handled. Positive comments described a culture where staff feel able to provide feedback and make suggestions, and where actions are taken to address feedback and make improvements. These comments came from a wide range of staff including staff at different grades and in different roles, staff who are new to their role, and staff who have been in their job for longer.

“I find everyone to be really open in receiving feedback from me and my team on areas which can be improved and always willing to take on board any suggestions we have.” **Staff participant**

“Working in a project environment, I have never been in a situation or call where an idea is vocalised and then dismissed. It is a very safe and communicative environment.” **Staff participant**

Participants in the partner organisation survey were asked if they thought Social Security Scotland was open to and acted on feedback (Table 16).

Table 16: Partner participant views on feedback
(n=73-74) Row percentages

How much do you agree or disagree with the following:	Agree or strongly agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know
Social Security Scotland is open to feedback	66%	9%	8%	16%
Social Security Scotland acts on feedback	34%	22%	19%	25%

Two-thirds of partner participants (66%) said they agreed or strongly agreed that Social Security Scotland is open to feedback. Fewer participants thought that Social Security Scotland acts on feedback it receives.

Partners who took part in interviews were positive about Social Security Scotland's culture of welcoming and acting on feedback. Partner participants described a willingness to accept feedback. A couple of participants went further and said that Social Security Scotland was eager to gather feedback and took steps to seek it out from partners. Most said they felt their feedback was listened to and had been told how Social Security Scotland would use it to make improvements. Participants noted they were also told when no actions or improvements were planned.

“Always found the agency staff very receptive and positive about feedback where we've identified potential access problems because they want to know what [they] could do to improve the information that they're supplying, the wording of communication and things like that... so far very receptive.” **Partner participant**

“I think it's gone really well. Social Security Scotland have always been open to feedback. They've been very proactive in reaching out to stakeholders. [They've had] regular meetings with us. They've been good... in the last year especially... rate it very positively.” **Partner participant**

“All feedback... it’s always addressed, always answered well, and honestly as well. If they can’t do something they’ll say that. They don’t say ‘oh well, we’ll do something about that’ and then... It’s honest answers like ‘it’s outside our limitations at the moment’. It is very easy.” **Partner participant**

Some partner participants mentioned that they participate in one or more of Social Security Scotland’s three stakeholder reference groups. These are:

- the External Equalities Reference Group,
- the Inclusive Communication Reference Group,
- and the Operational Reference Group.

These groups provide a space for feedback and discussion between Social Security Scotland and its partners. Partner participants were positive about being on the reference groups. They said they had built good relationships with the staff running the groups and found them to be welcoming and open. They said the groups were useful for getting updates from Social Security Scotland and for sharing feedback about improvements to the service.

“Brilliant. It’s been very good. I alternate with my colleague. Right from the beginning they were very welcoming in terms of an organisation, and very keen to get our feedback. We’re all on first name terms now, we know each other quite well. As an organisation they respect what we offer and take it on board, and for all the other organisations. It’s very accessible. They understand inclusiveness which is very important. No criticism at all, it’s a very useful group.”
Partner participant

4.3. Client involvement in the feedback process

There are a range of ways for clients to provide feedback to Social Security Scotland. This includes: directly to staff they engage with, formal suggestions and complaints, and research such as the Client Survey, Client Panels projects and User

Research. This section looks at client experiences of the feedback process, including feedback client participants gave about being part of this research.⁷

A couple of client participants mentioned their experiences of giving feedback to Social Security Scotland staff over the phone. They felt that staff were understanding, apologetic and responsive, and that their feedback was taken on board. One participant had given feedback about Social Security Scotland's call back system. They felt satisfied it would be passed to the appropriate team in Social Security Scotland and that giving feedback was a positive process.

"I mentioned the fact that the call back system didn't seem to be working, so they were going to pass that on to the technical team. I understand about technology, it doesn't always work, it can fall down sometimes. It's not anyone's fault, it's just the system. [...] She apologised and said 'I'm sorry the system's not working'. [...] It was taken on board. Speaking to them is a pleasant experience."

Client participant

Client participants were happy Social Security Scotland carried out research with clients to understand how their service is working. Participants were pleased to have the chance to take part in the research and discuss their experiences.

"I think that's why I wanted to do it. To say I hadn't had the best experience. As someone who doesn't know how the benefit system works, it can be quite confusing for people who don't know. I wanted to take part so that that was logged somewhere." **Client participant**

"With the other disability thing I never ever got asked anything. I didn't get asked how I was getting on. Nothing like this, no research, that was it. It was just 'you get it, here it is, goodbye'. I think it's good you're doing that, just so you can see if it's working or if you need to change things." **Client participant**

⁷ Client participants were also invited to take part in a parallel Client Panels research project which asked members to give feedback about their experience of being part of the panel. The results from the project will be published alongside this year's Charter research. Once published, the report will be available to read online at: <https://www.socialsecurity.gov.scot/about/social-research>

“I’m quite happy to help. The fact that you’re asking, that’s enough. See having the service user engagement, that’s ideal. How else will you know if something’s working or failing unless you speak to people who use it? This is great this system. I’m happy with it. I’m grateful you asked me to take part.”

Client participant

A couple of client participants had specific concerns about the ways Social Security Scotland gathers clients’ feedback. Issues raised included the length of the Client Survey as potentially off-putting and inaccessible. One participant hoped research would be carried out face to face in the future.

“The feedback form, that’s 40 pages. That needs to get in the bin. That’s exactly where it’s going to end up for most people it’s sent out to.” **Client participant**

“It would be nice to be working with people from yourselves and your part of the organisation, looking at different benefits that aren’t quite there, to do that face to face. I don’t mind this [video calls], I’ve got used to this. Everything I’m involved in with my kids, it’s been done online. And I don’t mind it. I just feel it’s a bit impersonal.” **Client participant**

4.4. Improvements based on staff and partner feedback

The Charter Measurement Framework asks for “Examples of You said: We did”. This means examples of where Social Security Scotland have made improvements based on feedback. Staff and partner participants were asked about their experience of giving feedback and what happened when they did.

Some staff provided clear instances of times when feedback led to an improvement. A common theme was improvements to internal processes which were put in place in response to feedback. For example, about how work is organised and tracked, or improvements to communications within and between teams.

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“Suggestion to improve practice by creating a spreadsheet tracker of file requests. This improved knowledge of staff dealing with this work and also made an electronic trail to monitor progress.” **Staff participant**

“I’d seen from my last role that one team manager was giving all the information to one team but then the other team weren’t been told anything... And at first it did appear that you were disadvantaged if you weren’t with the service manager that had been here a long time... I was able to talk to my line manager and say ‘this is what my thoughts are, this is what others are saying’... straight away that was dealt with. We all got the same email, whatever information we needed was sent to everyone... And again I was respected for saying that. They were actually happy that I said it because they didn’t realise that had happened.”
Staff participant

There were also examples of providing suggestions which led to improvements in the client experience. These were: improvements to application forms; working in partnership with the Department for Work and Pensions; and working with policy and legal teams to consider benefit eligibility.

“Feedback that the online Child Disability Payment form is too long and difficult to follow as it feels like the client is repeating themselves or can’t see what questions are coming up. Fed back to manager and was informed that a new online form is going to be trialled.” **Staff participant**

“While taking a call from a client in Case Transfer the information they received from the Department for Work and Pensions was not correct and my responsibility was to advise the client of this and get them to call back the Department for Work and Pensions. By the time I took the call two hours of phone calls had been made. I realised asking the client to call back the Department for Work and Pensions would upset them more. I therefore took the client’s details and said I would check this out and call him back.

Speaking with my managers, my manager escalated the miscommunication and this led to the Department for Work and Pensions realising a system error at their end, which was quickly rectified and saved many of their clients receiving wrong information. I believe it also brought together managers from the Department for Work and Pensions to work with us more closely if this type of scenario arose again. Because of the excellent working environment I am in, I was confident in speaking to superiors on this matter and confident I could 'bend the rules' slightly in that I could call the client back. The client was so relieved and thanked me for delivering what I said I would.” **Staff participant**

“I was to deny a client their application for a Low Income Benefit as they did not meet the eligibility criteria. On questioning that particular reasoning, the case was put to policy and legal [teams] to be used as an example where this barrier was looked at and policy and guidance was amended to include this part for this particular group of clients.” **Staff participant**

As well as within the organisation, Social Security Scotland also receives and provides feedback to partners. This includes policy makers within the Scottish Government. In their survey comments, staff gave examples of Social Security Scotland and the Scottish Government sharing feedback.

“Feedback from clients and third parties has been put to policy for consideration and options papers developed for changes to regulations.” **Staff participant**

Partners who took part in the research gave some examples of providing feedback that led to improvements. One participant gave an example of how Social Security Scotland had listened to their feedback and used it to improve information for older

clients. Another partner participant also gave an example related to issues of accessibility for clients who use British Sign Language.

“Working alongside Social Security Scotland, regarding the changes in the names of benefits to come and their approach to this project, I have found very informative and helpful. The project supervisors have listened to my thoughts/experience of working with [the] elderly and their approach to the information leaflets [has been] altered to help the client understand the new process to come and make clear to them the changes to come.”

Partner participant

“There was a number of film clips and there was an English person signing British Sign Language. What they’ve done is, they’ve made improvements. They’re now using Scottish people doing British Sign Language. It’s like a dialect, like the difference between Glasgow and Edinburgh. We want to make sure people in Scotland understand British Sign Language.”

Partner participant

4.5. Problems with feedback – Staff

Some staff described negative experiences about providing feedback. Staff identified several difficulties including not knowing how to give feedback and having little control over making improvements. They said support was needed from more senior staff to ensure feedback was acted upon. Other difficulties included the time taken to receive a response to suggestions, or hearing no response at all.

“I’m not 100% sure on the actual feedback channels and where we would actually bring that up and be due a response for it.”

Staff participant

“My concern about these internal suggestions for improvement is that they will potentially be deprioritised continually until we reach a steady state. If that's the case, that needs to be communicated so staff don't lose passion/willingness to help us improve.”

Staff participant

A number of staff had suggestions for improvements in the internal operation of the Local Delivery service. The Local Delivery service offers face to face support for people across Scotland to help them access Social Security Scotland benefits. Following a pilot in three local authority areas, the service was rolled out nationally in November 2021. Based on early experiences of the new service, some said it could be made easier to record feedback. Some felt that their feedback had not been listened to, or that managers could do more to implement changes. In their comments, staff explained that feedback was being shared but improvements will take time to be put in place. There were concerns about the impact this could have on client experience and staff confidence.

“There is an issues log we can escalate to but it takes longer than the ideal time to get answers and sometimes the answers aren't clear. I understand it is a new department but it needs a lot more straightforward clear guidance on the [internal system], and needs a quicker way for us to escalate questions and get responses.” **Staff participant**

“The travel and transport policy deployed to supposedly allow Local Delivery Client Support Advisors to attend Outreach Locations or visit clients is unrealistic, dogmatic, staggeringly bureaucratic and not Best Value, particularly in Rural Areas. Public transport is virtually never a realistic option... I feel I am being ignored on this subject and [this] leaves me feeling that I have been employed by an agency that is really not listening and acting in the best interests of rural clients or staff.” **Staff participant**

4.6. Problems with feedback – Partners

Although section 4.2 showed that overall, partners were positive about Social Security Scotland's attitude towards feedback, there were some negative comments. One partner participant said Social Security Scotland carried out a lot of consultation with partners but this hadn't led to improvements. A partner participant said that Social Security Scotland could be inconsistent in how they deal with feedback.

“I feel there is a lot of consultation etc. but nothing ever changes.”
Partner participant

“Some people do follow up. Some people don’t, or they forget... Sometimes they say ‘thank you for this, I’ll follow this up’. Sometimes I don’t hear anything. And then I’ll get in touch and they say ‘sorry I forgot, I forgot to get back to you’. So they could be better in that.” **Partner participant**

Partner participants were asked if they had provided feedback (Table 17).

Table 17: In the last year, have you given Social Security Scotland any feedback about how they could improve?

(n=73) Column percentages

Response options	
Yes, I have given feedback	56%
No, I haven’t wanted to give feedback	29%
No, I wanted to but don’t know how to give feedback	15%

Over half (56%) said they had given feedback. More than one in ten (15%) said they wanted to give feedback but didn’t know how to do this. All participants who chose this option work with or provide support for clients.

This difference between types of partners was also found in their interview discussions. Some partner participants said they felt confident about giving feedback to Social Security Scotland staff who they knew well or where there was a good working relationship. These participants worked in partnership with Social Security Scotland and often had an established personal or organisational relationship with key contacts or teams. Two partner participants who work with or support clients said they were unsure about how to give feedback.

“I’ve had reasonable access to people at various levels. I would feel confident if there were any issues that I would be able to approach someone. Which is maybe a bit more privileged than other stakeholders in that respect, just because of the nature of the work we’re undertaking together at the moment.”

Partner participant

“If I needed to provide feedback on relevant bits, I would go to the people I’ve dealt with by email. User research is an example, if something came [up] related to a group I’d done before. So on this subject, I’d be able to feed back into the relevant place... It’s difficult to navigate when you don’t have something in front of you. But I know who to contact, and if it’s not the right person, I can get put on to the right person. A telephone address list would be useful for organisations.”

Partner participant

This difference between partners who have different roles was also seen in attitudes about Social Security Scotland’s openness to feedback (Table 16, section 4.2). Partner participants who work with or support clients were more likely to disagree that Social Security Scotland is open to or acts on feedback.

5. A Learning System: Client experiences of mistakes and complaints

This chapter looks at another aspect of how Social Security Scotland can learn and improve. The Charter Measurement Framework asks for “examples of acknowledgement of mistakes” and for “qualitative evidence on client experience of the complaints process.” This chapter looks at feedback from client participants who said something had gone wrong and staff perspectives on mistakes and complaints.

5.1. Client experiences of things going wrong

A few client participants mentioned mistakes made by Social Security Scotland. Some of these client participants retained an overall positive view of Social Security Scotland despite mistakes happening. Many had goodwill towards Social Security Scotland, as described in section 4.1, despite their experiences. For many, an open and honest approach from Social Security Scotland to making mistakes was particularly helpful. There was evidence that clients understood that Social Security Scotland wouldn't always get it right and that an open and transparent attitude made the difference when things went wrong. There were also a couple of client participants who thought that IT problems can cause mistakes which are out of anyone's control.

“Things will go wrong. Mistakes will be made. For me it's how it's dealt with. And for a wee while it wasn't dealt with very effectively. But once it got to the point where I grudgingly put in a complaint – because I really didn't want to complain because I want this to work so much. But once I put in a complaint it was dealt with very quickly, very effectively, and within the timescales that are laid out that I was told about. To me, if it goes wrong it's how it's dealt with and it was dealt with pretty efficiently to be fair.” **Client participant**

Examples of mistakes made by Social Security Scotland included errors in processing applications and delays or problems making payments.

“When I phoned up after the date I had been given had passed, the chap was really helpful. He said he was going to look into it. It was at this time I found out that [the] details didn’t match up with what was on the registry, and that was why there had been such a delay. He said to me ‘actually, somebody should have checked that before now’... So he just looked into it and that’s when we found out it was [that] the name had been spelled wrong and that’s why it hadn’t been processed yet... I did feel like they acknowledged that there had been a mistake and he was apologetic for it.” **Client participant**

Participant: “With it being the wrong pay day, the staff member that I spoke to said it’s happened to so many people. And you can tell that they were being honest about it... My experience of the Department for Work and Pensions is they’ll never ever ever admit they’ve made a mistake over the phone. Whereas, to have a staff member say straight up ‘this has happened to lots of people, we’re really, really sorry and our managers are aware there’s not been letters out to people, it’s an issue’...”

Interviewer: “and how does that make you feel on the other end of the phone?”

Participant: “It makes you feel like you’ve been listened to, it makes you feel like your complaint counts. I’ve never felt as if the person is trying to rush me off the phone, and I can talk!”

Client participant

This issue was also raised by a staff participant. The participant had given feedback about the issue to managers but felt there had been a delay in making improvements.

“We have changed clients’ payment days who are transferring from Disability Living Allowance for Children to Child Disability Payment. We assure our clients via social media and introduction letters that their payment dates will not change. However, this is not always the case. We are changing clients’ payment schedules as [the payment system] can only handle paying Child Disability Payment on a Wednesday. I informed management in November 2021 that some clients in receipt of Disability Living Allowance for Children get paid on Tuesdays... This went ignored at the time and may potentially be a huge issue now [February 2022] as clients are now not receiving their payments when they should, despite being reassured nothing would change.” **Staff participant**

Some participants who mentioned mistakes said they had made a complaint about the error. This included one who had experienced multiple issues to do with their payments, and another who was unhappy with the process for becoming an appointee for her son.

“I did raise a complaint because of the bank holiday... there was an IT error that [meant] payments had been deferred. As soon as that happened, I need to be honest, my anxiety kicked in. I thought, oh my god, this has went back to this ‘other’ bank account.

And I remember what had upset me that time was that we had planned to take him [on a trip], and I had told my son this... I said what’s upset me is now, telling any child that you’re going to do something and then taking it away, you’re going to [get] a bit of a reaction. But see telling an autistic child something, and then you pull it away, he starts to lose trust in me and I can’t afford that.

But again, the girl was very apologetic, she said it was something that the IT team were working on. And the fast track team really helped... they completely understood, they were apologetic, they took ownership when it mattered. They were able to look into things and say ‘that doesn’t look quite right’ or ‘not quite sure’.” **Client participant**

Participant: “But when they were asking questions about the appointeeship, I felt as if I was going through an assessment to be honest with you. I felt as if they were reassessing my son and I wasn’t told that would happen... I felt it wasn’t an appointeeship appointment, I felt it was an assessment appointment. I’m not criticising, obviously the advisor needed it for a reason. But [the advisor] was there for nearly two hours... I phoned and I said I wasn’t happy.”

Interviewer: “What happened when you spoke to someone with feedback?”

Participant: “They apologised and said they’d look into it.”

Client participant

5.2. Staff perspectives on mistakes and complaints

The survey and focus groups carried out with staff gave an insight into their perspective on the client complaint process. Client Experience staff who participated in the focus groups said that problems with Social Security Scotland’s systems had led to complaints from clients.

“A number of complaints have system issues at their heart. Uploads haven’t worked or systems aren’t working the way they are meant to. So quite a lot of complaints involve something going wrong with the IT side of things.”

Client Experience staff participant

As well as technical issues, participants said that another common reason for complaints were long processing times and lack of updates on the status of applications.

“That’s the bulk of it – timescales and people being told different things. Also complaints about the lack of call backs and lack of keeping clients updated. A lack of communication on how their application is progressing or how their issue is being resolved.” **Client Experience staff participant**

Participants also raised communication as an important theme when discussing experiences of the complaints process. Participants said that improvements were

Dignity, fairness, respect.

needed to ensure complaints were being handled consistently and within the agreed timescales. Participants said this was important in order to provide accurate updates to clients who make complaints.

“I would say maybe sometimes at the first stage the complaint handling could be improved. ‘I’m going to call you back in 5 days and this is our complaints process’ – sometimes that is missing. Some people just log a complaint then don’t take responsibility for fixing it. So I wouldn’t say keeping clients informed is uniform across the agency.” **Client Experience staff participant**

A Client Experience staff participant raised a concern about responding to suggestions from clients when there is no clear timescale on when improvements may be made. A similar issue was raised by a staff participant who said improvements were needed to the complaints system to allow outcomes to be more accurately recorded.

“It’s difficult to get someone to say ‘yes we are going to do that’. Oh yeah, it’s in the pipeline for the future. How on earth do I explain that to a client? I had one on the go and I checked in with him every two weeks and at the end [of] 6 months it was like ‘it’s on a list, we might get to it eventually. Your suggestion has been taken on board, but at the moment it’s not something we are going to implement. We might implement it over the next however many months’. It’s a difficult thing because there is no timescale attached to it.”
Client Experience staff participant

6. Next Steps

The research findings provide insight into the experiences of Social Security Scotland clients, staff and partners during the year 2021-22. 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 activities across Social Security Scotland.

We will shortly begin designing next year's bespoke research with clients, staff and partners for the 2022-23 Charter Measurement Framework.

7. Annex A: About the staff survey participants

Table A1: Gender

Response options	All respondents (n=422)
Men	62%
Women	29%
Other	*
Prefer not to say	*

*Suppressed due to low numbers.

Table A2: Age

Response options	All respondents (n=422)
16 to 24	*
25 to 34	23%
35 to 44	22%
45 to 54	28%
55 to 64	15%
65 or over	*
Prefer not to say	9%

*Suppressed due to low numbers.

Table A3: Ethnicity

Response options	All respondents (n=418)
White groups	93%
Ethnic minority groups	2%
Prefer not to say	6%

Table A4: Disability

Response options	All respondents (n=416)
Has a physical or mental health condition	26%
No condition	66%
Prefer not to say	8%

Table A5: Grade from most junior to most senior

Response options	All respondents (n=421)
A-band	19%
B-band	64%
Fast Stream	*
C-band	10%
Senior Civil Service	*
Prefer not to say	6%

*Suppressed due to low numbers.

Table A6: Working pattern

Response options	All respondents (n=420)
Full time (37 hours a week)	89%
Part time	9%
Prefer not to say	2%

Table A7: Time in service

Response options	All respondents (n=389)
<1 year	60%
1-2 years	17%
2+ years	22%

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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ISBN: 978-1-80525-198-9

ISSN: 2045-6964