Social Security Scotland
Scotland
Tèarainteachd Shòisealta Alba

Social Security Scotland
Charter Research 2023-2024

social research

Exploring this research

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Findings at a glance

The research involved surveys with Social Security Scotland staff and partners on their experiences with Social Security Scotland in 2023-24.

Over half (57%) of partner respondents rated Social Security Scotland's overall service as good or very good. Some thought the service was delivered in a fair and dignified way. Around half said Social Security Scotland had been open (48%) and honest (49%) about challenges to delivery of the service. Others were dissatisfied with long waits for decisions and called for more transparency about application processing times.

Around a fifth (18%) of partner respondents who support clients said it was easy or very easy to contact Social Security Scotland for clients. Some had no issues but many experienced long waits and difficulty communicating as a third-party. Around a third (34%) said the application process was easy or very easy. Some said applications for disability benefits were straightforward, but others said they were long and complex. Many wanted an escalation route to help progress applications for vulnerable clients.

Most staff respondents felt confident or very confident to deliver a service that reflects a human rights-based system (85%) and without discrimination (89%). Training, experience, and personal values helped them feel confident. Some felt internal policies, high workloads and the service not being fully accessible had led to unfair treatment of some clients and staff. They suggested to better embed the Charter in staff culture.

Most staff respondents (79%) had good or very good support from their line manager. Most (83%) felt confident or very confident in their knowledge and skills. Training and guidance helped some feel well-equipped to do their job. Others wanted clearer communication about frequently changing guidance and more time for learning.

Some partner respondents had complained about issues or mistakes. Most had their complaint resolved but others didn't hear back. A few were unhappy with the outcome.

Some staff and partner respondents said Social Security Scotland welcomed and acted on feedback. Others said feedback wasn't listened to or acted on, or that action was slow. There were calls for improved communication about how feedback is handled.

Executive summary

This report presents the findings from research with Social Security Scotland staff and partner organisations about how Social Security Scotland performed in 2023-24. The research was designed to provide data for a range of measures in the 2023-24 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 was carried out between January and July 2024. It involved a survey completed by 1,490 staff (36% response rate); focus groups with 6 Client Experience staff; and a survey completed by 229 partners.

The sections below provide the headline findings from each theme of the research. Findings from this report appear in the relevant sections of the 2023-24 Charter Measurement Framework.

A People's Service: What partners and staff said about their overall experience with Social Security Scotland

Partner experiences of Social Security Scotland

Over half (57%) of partner respondents rated Social Security Scotland's overall service as good or very good. Around half said that Social Security Scotland is open (48%) and honest (49%). Partner respondents were positive about Social Security Scotland's approach towards delivering a fair and dignified service for the people of Scotland. Some said Social Security Scotland had been open about challenges to the delivery of the service and transparent in their communications to clients. Others wanted more transparency about the challenges faced, particularly the length of time needed to process applications for Adult Disability Payment and Child Disability Payment.

Around two-thirds (64%) of partner respondents said Social Security Scotland had worked well with them and their organisation. Half (50%) said that Social Security Scotland had worked well at answering their queries. Respondents described positive experiences of working in partnership with Social Security Scotland, with praise for

stakeholder events and the staff they had engaged with. Some raised a need for closer engagement with partner organisations to help improve the service for clients.

Staff experiences of Social Security Scotland

The majority of staff respondents said they were familiar with Our Charter (84%) and that they felt confident or very confident to deliver a service that reflects a human rights-based system (85%). Most (89%) felt confident or very confident to deliver a service without discriminating against others.

Staff respondents said guidance, training, personal and professional experience, and a culture of equality and fairness in their team had helped them to feel confident. Respondents mentioned a personal commitment to treating others with dignity, fairness and respect and considered the Charter values to be integral to their role. Challenges to delivering a service in line with the Charter included: problems with internal policies and processes, workloads and resourcing issues, and the service not being accessible for all. Some felt clients and staff were experiencing unfair treatment as a result and that the Charter could be better embedded in internal culture.

Processes that Work: Partner experiences of using the service on behalf of clients

Most (90%) partner respondents said they support clients or potential clients of Social Security Scotland. These respondents were asked about their experience of supporting clients to use the service, including getting in touch with Social Security Scotland on clients' behalf and helping them to apply. Most had supported clients with Adult Disability Payment although many had helped clients with more than one benefit.

Getting in touch with Social Security Scotland

Around a fifth (18%) of partner respondents who support clients said it was easy or very easy to make contact with Social Security Scotland on behalf of clients. Three in five (60%) found it difficult or very difficult. Some respondents had no issues contacting Social Security Scotland via phone or webchat, with some noting that waiting times had recently improved. Others reported long waits and felt call waiting times were a barrier

to clients who preferred or needed to access the service by phone. Many respondents mentioned problems with third-party consent when contacting Social Security Scotland for clients. Suggestions for improvement included: a dedicated phone line or email service for partners, separate phone lines for specific benefits, and easier processes for registering third-party consent.

Experiences with staff

Around half (47%) of partner respondents who support clients rated their experience of speaking to staff on behalf of clients as good or very good. Some respondents said staff were helpful, patient, and knowledgeable and dealt with their queries promptly. Others said staff were pleasant but didn't always have the right knowledge to help. Some received conflicting information and varying levels of help from different staff members, including a few experiences of poor staff manner. Respondents felt staff would benefit from better training on things like third-party consent, language interpretation, and processes for terminally ill clients.

Applications

Around a third (34%) of client-facing partner respondents said it was easy or very easy to go through the application process with or for clients. Slightly fewer said it was difficult or very difficult (29%). Most comments were about applications for Adult Disability Payment and Child Disability Payment. Some respondents said applications for disability payments were straightforward, laid out clearly, and questions were easy to understand. Others said disability payment applications were complex, took a long time to complete, and didn't always allow clients to accurately explain their or their child's condition. A few experienced technical problems when using the mygov.scot portal with clients. Some said the length and complexity of applications had deterred some clients from applying for disability benefits.

Experiences of Local Delivery

Partner respondents were positive about Social Security Scotland's Local Delivery service and felt this was a useful way for clients to receive support to apply. There was wide praise for Local Delivery staff with partner respondents describing them as friendly, approachable, and wanting to help clients. A few said Local Delivery staff gave

limited or conflicting information or weren't always available to assist with queries. Some mentioned difficulties making Local Delivery appointments on behalf of clients, including long waits when booking via phone and problems confirming or checking appointment details. Suggestions to improve the service included: the ability to refer clients directly to Local Delivery, an online option for making appointments, and better promotion of the service to clients.

Decisions

Some partner respondents left comments about the decisions clients had received. They said decision letters were straightforward, easy for clients to understand, and clearly explained the reasoning behind decisions. However, many respondents were dissatisfied with application processing times for disability benefits and highlighted the negative impact of long waits on client wellbeing. Some said a long wait for decisions was one of the only negative aspects in an otherwise positive experience of the service. A couple felt that delays were to be expected with the launch of new benefits.

Similarly to previous years, partner respondents were frustrated by the lack of a third-party escalation route for applications that need to be processed urgently, such as for vulnerable clients. Some felt an escalation route could help to solve cases where issues had arisen or where an urgent decision was needed.

Accessibility of Social Security Scotland's service

Three in five (60%) client-facing partner respondents said the service was 'somewhat accessible' for clients. Around one in five (16%) said the service was 'very accessible' and a similar proportion (17%) said it was 'not at all accessible'. Some respondents described the service as user friendly and accessible for clients. Positive examples included: clients having a choice of ways to contact Social Security Scotland and to apply; simple processes for uploading supporting information; and the availability of information in languages other than English. Some said Local Delivery in-person appointments and the Independent Advocacy Service delivered by VoiceAbility were accessible ways for clients to get support to apply.

Other respondents noted that the service was accessible for most clients but not all. Many mentioned examples of digital exclusion for clients who couldn't access online

information and applications. Other negative examples included issues with interpretation, three-way calls, and getting past the security process at the start of calls. Some felt the long wait to speak to an adviser was a barrier to accessing the service and had led some clients to use an alternative application route they weren't comfortable with.

Additional Support for Clients

Staff and partner respondents, as well as Client Experience staff participants, made suggestions to improve Social Security Scotland's service. Suggested improvements to communication included text updates about application progress and the ability to save a copy of webchat conversations. As in previous years, there were suggestions to extend the helpline and webchat opening hours and to provide secure email as a communication option for clients. Other suggestions included: the ability to access application forms without having to register first either online or by phone; the option to complete the first and second parts of applications across different formats; and for application guidance to be made available in a wider variety of formats including video and animation.

Working for Social Security Scotland: Staff experiences

Staff knowledge and skills

Most (83%) staff respondents 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 or will do so in the future (969 respondents) were asked additional questions about their knowledge. Over three-quarters (78%) rated their knowledge of the social security system in Scotland as good or very good. Most said they knew about support services (70%) and how to refer clients to these (60%).

Support from managers, practical experience, and peer-to-peer knowledge sharing had helped staff respondents to feel confident. They said training and guidance had helped them to feel knowledgeable and well-equipped to do their job. Respondents who didn't feel confident mentioned: a lack of peer or manager support, issues with training and

guidance, and frequently changing priorities and processes. Some mentioned workload pressures and wanted more protected time for learning. There were calls for refresher training on things like internal processes and mental health awareness. Some felt changes to guidance should be communicated more efficiently and consistently.

Support for staff

Most (79%) staff respondents said they'd had good or very good support from their line manager. Staff respondents said line managers were approachable, knowledgeable, understanding and accommodating. Line managers offered frequent communication and had supported respondents with work issues, personal circumstances, and additional needs or requirements at work. Opportunities for professional development and input into team decision-making had made respondents feel valued and empowered. Respondents who didn't feel supported mentioned: poor or infrequent communication; line managers not having the training, knowledge or experience to help; additional needs not being listened to or met; and experiences of unfair treatment or discrimination.

Communication

Most (79%) staff respondents felt confident or very confident to deliver a service based on inclusive communication. Staff respondents felt a personal commitment to inclusiveness. They felt confident thanks to training, internal guidance, support from colleagues, and experience gained over time. Others felt they would benefit from more training and guidance on inclusive communication. Some said inclusive communication could be better embedded across the organisation.

Around three-quarters (74%) of staff respondents found it easy or very easy to communicate with colleagues in a way that felt inclusive of their own needs. Respondents appreciated having a range of internal communications channels and ways to share and receive information. Some mentioned examples when their communication needs weren't met, including: the use of acronyms in written and verbal communication, communication preferences not being met in online meetings, and information and internal systems being incompatible with assistive technology.

A Learning System: Listening to feedback and making improvements

Partner experiences of giving feedback

Half (50%) of partner respondents thought that Social Security Scotland is open to feedback. A quarter (25%) thought Social Security Scotland acts on feedback. Over half (51%) of partner respondents said they had given feedback. A fifth (20%) said they wanted to give feedback but didn't know how.

In written comments, respondents said Social Security Scotland welcomed suggestions and were committed to improving the service based on feedback. Some mentioned positive experiences of providing feedback to staff, saying they were engaged and took suggestions on board. However, some said staff didn't always make it clear whether feedback would be actioned.

Some respondents said they noticed changes as a result of their feedback and were pleased with this. Others said Social Security Scotland had not acted on suggestions or had been slow to deal with issues. Some recognised it would take time to make large-scale improvements. Other issues with feedback included: delays hearing back from Social Security Scotland or not hearing back at all, and inconsistent or conflicting communications in response to feedback.

Staff experiences of giving feedback

Most (80%) staff respondents said they would speak up if they saw something wasn't working or thought something was wrong in Social Security Scotland. Staff respondents felt a personal responsibility to report issues and provide feedback to improve Social Security Scotland's service. Some felt confident to share their concerns and reported an internal culture of encouraging feedback. Examples of feedback included: changes to ways of working, better communication within and between teams, and improvements to internal processes and policies.

Other respondents felt their views weren't valued and that feedback didn't lead to change. Some were reluctant to provide feedback in case it wasn't welcomed or led to negative consequences in their role. There were calls for improved communication about how staff feedback is handled and actioned.

Improvements based on feedback

Staff and partner respondents mentioned examples where feedback had led to improvements in Social Security Scotland. A few partner respondents noted that Social Security Scotland had taken measures to address call waiting times and delays in processing applications based on feedback. Some staff respondents said their feedback had led to improvements to Social Security Scotland's service as well as internal policies and processes. Examples included improvements to processes for communicating with clients, how applications are managed and processed, and guidance for supporting vulnerable clients. There were also improvements to staff processes for Local Delivery appointments and ways of working within specific teams.

A Learning System: Experiences of mistakes and complaints

Partner experiences of things going wrong

Some partner respondents experienced problems and mistakes made by Social Security Scotland including applications being lost or not received and incorrect or conflicting communications to clients. Respondents also mentioned issues with identification checks and problems submitting a change of circumstances or review.

Partner respondents had complained, or helped clients complain, about mistakes and problems. Some had complained in cases where applications needed an urgent decision but there was no other way to escalate issues. Some had heard back about their complaint and said Social Security Scotland acknowledged or resolved the issue. Some hadn't received a response from Social Security Scotland. A few were dissatisfied with the outcome of their complaint.

Staff perspectives on mistakes and complaints

Client Experience staff participants said complaints were commonly about the time taken to process applications and receive a decision. Other common complaints were about: a lack of updates during the application process, receiving conflicting information about the status of an application, and not receiving promised call backs. Mistakes that had led to client complaints included missing letters and errors in clients' details on Social Security Scotland's system. Participants said clients had sometimes tried to

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complain multiple times before their complaint was dealt with. They suggested more training and practical experience for client advisers to confidently handle queries and complaints, and for improvements to the internal system for logging complaints.

Next steps

Findings appear in the relevant sections of the [2023-24 Charter Measurement Framework](). They will be fed into continuous improvement across Social Security Scotland.

Research will shortly begin for the 2024-25 Charter Measurement Framework. The Charter was recently reviewed as required by the Social Security (Scotland) Act 2018. The Charter Measurement Framework was also reviewed and updated in line with changes to the Charter. The revised Charter Measurement Framework will be used for the 2024-25 research.

Introduction

This report presents the findings from research with Social Security Scotland staff and partner organisations about how Social Security Scotland performed in 2023-24. The research was designed to provide data for a range of measures in the 2023-24 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 publicly demonstrates whether Social Security Scotland and the Scottish Government are meeting and delivering the commitments in Our Charter. The framework 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. The framework contains a comprehensive list of measures that focus on how Social Security Scotland's services are working. Measures that ask for 'examples' of staff and partner experiences were used to develop questions for this research. Findings from this report appear in relevant sections of the 2023-24 Charter Measurement Framework.

Research methods

The research was carried out between January and July 2024. A range of methods were used across the different strands of research.

All staff in Social Security Scotland were invited to complete a survey which ran in February and March 2024. The survey asked staff about their experience of working for Social Security Scotland during 2023-24. 1,490 staff took part, a response rate of approximately 36%.[1] The staff survey carried out in 2022-23 received the same response rate of 36%. Respondents to the staff survey are called 'staff respondents' in this report.

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[1] According to Social Security Scotland's HR data, there were approximately 4,177 staff in Social Security Scotland when the survey was launched in February 2024.

In July, two focus groups were carried out with six colleagues from Social Security Scotland's Client Experience teams. These colleagues work on re-determinations and appeals where clients have challenged a decision, and on complaints and feedback from clients. Participants were asked about their experience of working on re-determinations, appeals, complaints and feedback during 2023-24 including the common reasons for re-determinations and complaints and how they felt these processes were working. Focus group participants are referred to as 'Client Experience staff participants' in this report.

Finally, a survey was sent to a range of partner organisations using Social Security Scotland's stakeholder mailing list. The survey asked partners about their experiences of Social Security Scotland in 2023-24, including how they think the service is working and what could be improved. The survey was also shared and promoted by Social Security Scotland staff who work directly with partners such as National Engagement and Local Delivery teams. Respondents were encouraged to share the survey with other relevant partners in order to reach as many people as possible. Partners (also known as 'stakeholders') 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 how the service is delivered.

The partner survey ran in January and February 2024 and received 229 valid responses. For comparison, the partner survey carried out in 2022-23 received 101 responses. Due to the way in which the survey is distributed each year, it is not possible to determine a response rate for 2022-23 or 2023-24. Respondents to the partner survey are called 'partner respondents' in this report.

About the participants

Most (80%) staff survey respondents worked full time. A quarter (25%) of respondents were A-Band staff, around two-thirds (64%) were B-band, and 6% were C-band or above.[2] Around two-thirds (65%) said they interact with Social Security Scotland clients as part of their job, or would do so in future, whilst around a third (35%) said client interaction is not part of their role. Over half (56%) of respondents were women and

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

30% were men. Over a third (39%) were aged 45 or over. Most (84%) were white. Around a third (34%) said they had a long term physical or mental health condition. Full tables of staff survey respondents' characteristics are at Annex C.

The 6 Client Experience staff who participated in focus groups were a mix of staff from the Client Experience team and the Performance and Quality team. The Client Experience team work on re-determinations and appeals whereas the Performance and Quality team deal with complaints and feedback. Participants were allocated to a focus group based on whether their work focused on re-determinations and appeals or on complaints and feedback.

The survey of partners asked how respondents had engaged with Social Security Scotland. Over half (52%) of partner respondents had attended a Social Security Scotland engagement event. Around a quarter had engaged with Local Delivery staff (29%) or sent a query or information request to Social Security Scotland (24%). A few said they belonged to one of Social Security Scotland's stakeholder reference groups.

Most (90%) partner respondents said they support clients or potential clients. More than half (57%) of those respondents said they had also engaged with the organisation in one or more of the ways mentioned above. One in ten (10%) respondents said they did not support clients or potential clients but had engaged with Social Security Scotland in one or more of the above ways. Full findings of partner respondents' engagement with Social Security Scotland are at Annex B (Table B1).

Partner respondents represented organisations from all regions of Scotland (Annex B, Table B4). Over half (56%) represented third sector or charitable organisations or advice providers. Around a third (31%) were part of a local authority, including welfare rights services within local authorities. Fewer respondents represented NHS or health professions (7%) or social landlords (7%). A small proportion were from other government departments or public sector organisations (Annex B, Table B2).

Partner respondents commonly belonged to organisations that offered advice, support or information to multiple client groups. Almost all respondents were part of organisations that offered services to people with health conditions (90%) or disabled people (85%). Many engaged with people on low incomes (84%), carers (80%) or older

people (76%). Around three in five offered services to homeless people (65%), young people (63%) and minority ethnic groups (61%). Over half engaged with care leavers (55%) and LGBTI communities (54%) (Annex B, Table B3).

Reading this report

It is important to note that the findings in this report represent the views of those who took part only. Findings from this research should not be seen as representative of all Social Security Scotland staff or partner organisations now or in future. It is reasonable though, given the number of responses, to treat the findings as indicative of the general view of staff and partners. It should also be noted that the findings represent a point in time where participants were asked to consider their experiences during 2023-24 and therefore doesn't reflect development activity within the organisation since then.

Whilst all research participants were asked to think about their experiences between 1 April 2023 and 31 March 2024 when providing their responses, we cannot guarantee that all responses referred solely to 2023-24. Some participants may have talked about experiences slightly before or after this period.

Results for each staff survey and partner survey question presented in this report exclude any respondents who were either filtered out of the question or who left the response blank. Results presented in tables use percentages to show proportions of respondents choosing different answer options. Results are rounded to the nearest whole number. Due to rounding, this means results included in tables may not sum to 100% and results in written text may differ slightly to tables where two response options have been combined for reporting purposes. Some percentages quoted in the report relate to questions that allowed respondents to choose more than one response. Again, these percentages will not sum to 100%. Where a result was less than 0.5%, this is shown as 0% in tables. Where no respondents selected a particular answer+ this is shown as '-' in tables.

Given the volume of data collected from staff and partners, analysis took a proportionate approach. Researchers reviewed the written comments for key themes and then used a proportion of comments to consider these themes in more detail.

Quotations have been used to illustrate the findings presented in this report. Edits to improve the readability of quotations were made as appropriate. We have avoided acronyms throughout this report to make it easy to read. This includes replacing acronyms with the full words in quotations where possible. Quotes have been selected to best reflect themes which emerged in the findings. The number of quotes illustrating each theme is not necessarily representative of the prominence of that theme in the data.

Year-on-year trend analysis of quantitative findings from the staff and partner surveys is presented in relevant sections of this report, where available, for 2022-23 and 2023-24.

1. A People's Service: What partners and staff said about their overall experience with Social Security Scotland

This chapter aligns with the first section of the Charter Measurement Framework and Our Charter. It looks at partner and staff respondents' overall experiences of Social Security Scotland and their views on its values and approach to service delivery in 2023-24.

1.1. Partner experiences of Social Security Scotland

Partner respondents were asked to rate the overall service delivered by Social Security Scotland (Table 1.1).

Table 1.1: **How would you rate the overall service delivered by Social Security Scotland?**
(n=228) All respondents, Column percentages

Response options	
Very good	12%
Good	45%
Neither good nor poor	22%
Poor	13%
Very poor	5%
Don't know / Not applicable	2%

Over half (57%) of partner respondents rated the overall service as good or very good (compared to 55% in 2022-23). Less than a fifth (18%) rated it as poor or very poor. A slightly higher proportion (22%) said it was neither good nor poor.

Partner respondents were asked how much they agreed or disagreed with statements on whether Social Security Scotland was an open and honest organisation (Table 1.2).

Table 1.2:   **Partner respondent views on openness and honesty of Social Security Scotland**
(n=226) All respondents, Row percentages

How much do you agree or disagree with the following...:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know / Not applicable
Social Security Scotland is an open organisation	48%	31%	9%	12%
Social Security Scotland is an honest organisation	49%	31%	6%	14%

Around half of partner respondents agreed or strongly agreed that Social Security Scotland is an open (48%) and honest (49%) organisation (compared to 51% and 53% in 2022-23). Just under a third (31%) said they neither agreed nor disagreed that Social Security Scotland is open and honest.

Written comments talked positively about Social Security Scotland's culture and client-focused approach to the delivery of the service. Some respondents felt that the organisation had tried to stick to its core values and to do the right thing for clients in spite of issues and challenges. Some felt that Social Security Scotland had been open and honest about the challenges faced. There was a perception that ultimately Social Security Scotland were still aiming to deliver a fair and dignified service for the people of Scotland in an open and honest way.

Comments described open and honest interactions with staff, including client advisers and staff at stakeholder events. Some respondents said Social Security Scotland had been open and honest in their communications with clients and the general public such as in decision letters and in the information published on Social Security Scotland's website.

"As far as I know Social Security Scotland is doing a great job and attempting to be open and accessible." Partner respondent

"It feels open and honest when you call." Partner respondent

"They have been open and honest in all their dealings that I know of and are respected in our community." Partner respondent

Some respondents felt there was a gap between what they expected from the service and what had been delivered in practice. They felt Social Security Scotland had not delivered what was promised and hadn't been forthcoming or honest enough about problems, challenges or mistakes. Some felt the organisation tended to focus on what had gone well with less attention paid to acknowledging issues. In particular, comments said the organisation had not been clear, transparent or honest about the length of time needed to process applications for Adult Disability Payment and Child Disability Payment. Some respondents were satisfied that Social Security Scotland had removed inaccurate information on processing times from the mygov.scot website, but were unhappy that there was then no indication of how long decisions could take.

"I wouldn't say dishonest but they don't mention any of the hiccups and again focus on what they think they have done well and try to brush away concerns without dealing with them." Partner respondent

"Give people a clear indication of how long it will take for an [Adult Disability Payment] decision. They would rather have the truth than an underestimate no matter how bad it looks for [Social Security Scotland]." Partner respondent

"On mygov.scot there was, frankly, misleading information about the waiting times. There now appears to be no information at all on the website about how long the decisions take." Partner respondent

Other respondents said internal processes and policies made them feel that Social Security Scotland wasn't an open organisation. Examples included: difficulties sharing or receiving information on a client's behalf due to issues with third-party consent; and being unable to escalate individual cases involving vulnerable clients. These issues are covered in more detail in other relevant sections of the report.

"[Social Security Scotland] is not "open" in any shape or form, it is very much closed. Cannot access appropriate complaint process, cannot escalate individual cases […]." Partner respondent

"I feel that the aim and ethos is to be open and honest with people, but this isn't always possible (operational restrictions etc) and so they can't be as open as they want to be." Partner respondent

The survey asked partner respondents about their experience of interacting with Social Security Scotland in the ways that they prefer (Table 1.3).

Table 1.3:   **How easy or difficult has it been to interact with Social Security Scotland in the ways you prefer?**
(n=225) All respondents, Column percentages

Response options	
Very easy	10%
Easy	20%
Neither easy nor difficult	18%
Difficult	28%
Very difficult	21%
Don't know / Not applicable	3%

Three in ten (31%) partner respondents said it was easy or very easy to interact with Social Security Scotland in their preferred way (compared to 30% in 2022-23). Just under half (48%) said it was difficult or very difficult (compared to 53% in 2022-23). Around one in five (18%) said 'neither'.

The survey invited partner respondents to comment on their experience of interacting with Social Security Scotland in their preferred ways. Some respondents described positive experiences and felt there were a range of options for communicating with Social Security Scotland. There was particular praise for webchat being a useful, and sometimes preferred, alternative to phone contact. Other positive comments were about staff being accommodating to communication preferences and responding promptly to queries.

"Web chat option is much appreciated as I find telephone communication very challenging." Partner respondent

"They will speak over the phone, by email or meet wherever suits the client. They are very accommodating." Partner respondent

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Some partner respondents experienced challenges around communicating with Social Security Scotland in their preferred ways. Some wanted to contact Social Security Scotland by phone or webchat when acting on behalf of a client but experienced long waiting times for both. As in previous years, there were many calls for email to be introduced as a standard communication option for partners who support clients.

> "Having only [a] telephone number and no way to contact by email is extremely frustrating." Partner respondent

> "I prefer webchat or phone interaction, but neither are good at present due to the waiting time to be connected on the phone and the lack of connection in general online is very poor." Partner respondent

The survey also asked partner respondents about their experience of working in partnership with Social Security Scotland (Table 1.4). For example, as part of Social Security Scotland's stakeholder groups, forums or engagement events.

Table 1.4: **How much do you agree or disagree with the following: Social Security Scotland has worked well with me and my organisation** (n=109) Respondents who have worked in partnership with Social Security Scotland, Column percentages

Response options	
Strongly agree	22%
Agree	42%
Neither agree nor disagree	20%
Disagree	6%
Strongly disagree	8%
Don't know / Not applicable	1%

Around two-thirds (64%) of partner respondents agreed or strongly agreed that Social Security Scotland had worked well with them and their organisation (compared to 67% in 2022-23). A fifth (20%) neither agreed nor disagreed and slightly fewer (15%) disagreed or strongly disagreed. There was an increase in the proportion of respondents who disagreed or strongly disagreed in 2023-24 compared to 2022-23 (7%).

Respondents were asked further questions about how well Social Security Scotland has worked at answering their queries and sharing information with them (Table 1.5).

Table 1.5: **Partner respondent views on how well Social Security Scotland has worked at sharing information and answering queries**
(n=109) Respondents who have worked in partnership with Social Security Scotland, Row percentages

How much do you agree or disagree with the following...:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know / Not applicable
Social Security Scotland has worked well at sharing information with me and my organisation	64%	16%	19%	1%
Social Security Scotland has worked well at answering queries from me and my organisation	50%	17%	30%	4%

Around two-thirds (64%) agreed or strongly agreed that Social Security Scotland had worked well at sharing information with them and their organisation. A fifth (19%) disagreed or strongly disagreed. Half (50%) agreed or strongly agreed that Social Security Scotland worked well at answering their queries, with three in ten (30%) disagreeing or strongly disagreeing with this. This was the first year that the survey asked partner respondents about how Social Security Scotland had shared information and answered queries. Year-on-year trend analysis is therefore not available for these findings. It will be included in future reports if these questions are asked in future surveys.

There were positive written comments about respondents' experiences of working in partnership with Social Security Scotland. In particular, they praised staff in the National Engagement and Local Delivery[3] teams, saying they were 'proactive' when working with stakeholders and describing relationships as 'constructive'. Some noted that National Engagement and Local Delivery staff were approachable, easy to engage with, and open to answering questions and receiving feedback. Other positive aspects of partnership working included: receiving useful updates and information via the stakeholder newsletter and Social Security Scotland-run meetings and events, being asked to share feedback to improve the service, and staff encouraging, attending and contributing to partner-run events.

> "There has been a shared experience of learning and openess to improving the experience of those using the service." Partner respondent

> "Very responsive and proactive e.g. we organised a drop-in session on the day the Child Payment went live and were able to sign up dozens of our clients that day - this was done at the suggestion of our Social Security Scotland [Local Delivery] worker and was a very positive experience for all involved." Partner respondent

> "Working with the National Engagement Team is always a pleasure. We have a constructive relationship." Partner respondent

Although comments praised Social Security Scotland's overall approach to partnership working, there were calls for closer collaboration with partners who support clients. For example, there was frustration at being unable to engage with Local Delivery staff on specific cases when supporting clients. Some respondents felt that better joined-up working between themselves and Social Security Scotland could help with improving understandings of different client groups and their needs, solving cases where issues

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[3] The Local Delivery service is a free service that is available across Scotland. Clients can use the service to get person-to-person support with an application or to ask questions about the application process. Specially trained client support advisers can provide support to clients by phone or video call, or in-person at a client's home or at a venue in the local community.

had arisen, and bettering the service for clients overall. There were other suggestions to improve partnership working including: more focused and relevant content at stakeholder events, reaching out to partners to understand current issues ahead of meetings, and more consistent and frequent engagement with Local Delivery staff across all locations.

> "[…] There should be better understanding of what third partner agencies do for clients and how Social Security Scotland can work together for the better of the client." Partner respondent

> "Partnership newsletters/emails are good and hope they continue. I have attended several events with the National Engagement Team and at each event although it is specific to a certain topic there is a lot of time dedicated at the event to tell us the current state of play and progress of what Social Security Scotland have done to date. This is very time consuming and sometimes not relevant given that we have already taken time out of our diary to attend the sessions […]." Partner respondent

> "Would like more links with the regional face to face team. Love the engagement online training. Plenty of them [and] they are free - great for charities who support clients - and [they] take enough time to go over our queries." Partner respondent

There were mixed comments about how Social Security Scotland had handled queries from partners. Respondents had submitted queries in a number of ways including during stakeholder events, over the phone to client advisers, and directly to National Engagement and Local Delivery teams.

A few respondents said they received the information and answers they needed in response to their query. Some said client advisers and National Engagement and Local Delivery teams were keen to help with queries but weren't always able to provide an answer or solution to an issue. Others hadn't heard back from Social Security Scotland about their query or felt their questions weren't adequately answered or followed up by staff.

"For the most part, easy to contact, engage with and explanations or answers are provided." Partner respondent

"Stakeholder events are filled with questions, and often left unanswered."
Partner respondent

"Early in 2023 I submitted several queries related to processes around supporting clients with Social Security Scotland benefit issues. These have never been answered. Direct contact with Social Security Scotland staff has been positive and staff seem keen to help, so the above issue may be due to an inability to provide me with the requested information, rather than an unwillingness to help."
Partner respondent

Of the respondents who heard back about their query, responses were mixed with some saying they heard back quickly but others saying it took a long time or that staff didn't get back to them when they said they would. Some were dissatisfied with the response they received.

"We have a good working relationship with Social Security Scotland in relation to events, information sharing etc. However, response from Social Security Scotland can sometimes be a bit delayed." Partner respondent

"Whilst I find Social Security Scotland generally helpful, unfortunately they haven't always been good at getting back to me with answers when they say they will."
Partner respondent

1.2.   Staff experiences of Social Security Scotland

The survey of staff asked respondents about their engagement with Our Charter (Table 1.6).

Table 1.6:   **Staff engagement with Our Charter**
            (n=1,475-1,489) All respondents, Row percentages

How much do you agree or disagree with the following…	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree
I am familiar with the commitments set out in Our Charter	84%	11%	5%
I consider the commitments in Our Charter when I carry out my work	78%	16%	6%

The majority (84%) of respondents agreed or strongly agreed that they are familiar with the Charter commitments (compared to 88% in 2022-23). Around three-quarters (78%) said they consider the commitments in their work. A small proportion said they weren't familiar with the Charter commitments (5%) or didn't consider them (6%).

There was a decrease in the proportion saying they consider the commitments in their work in 2023-24 compared to 2022-23 (84%). Most of this change was due to a higher proportion selecting 'neither agree nor disagree' in 2023-24 (16%) compared to 2022-23 (11%).

In written comments, staff respondents often talked positively about the Charter and Social Security Scotland's values and ethos. Many described being familiar with the Charter and feeling that their personal values were reflected in the commitments. Some talked specifically about using and referring to the Charter in their daily work or within their teams, and said the commitments were fundamental to shaping how they behaved and carried out their role. Others said they were aware of the Charter in principle but weren't familiar with detailed commitments or didn't engage with it specifically within their work. A few had instead focused on applying the organisation's values of dignity, fairness and respect within their role. A couple of respondents were new to the

organisation and said they were still learning about the Charter and its commitments. A small number said they weren't aware of the Charter.

> "I am passionately supportive of these values and it is my priority focus to mindfully work in this way with all people." Staff respondent

> "I am aware of the charter but I haven't read it in enough detail [and don't] use it on a day to day basis." Staff respondent

Staff respondents were asked about their experience of delivering a service in line with the human rights-based themes of the Charter (Table 1.7) including how confident they felt to deliver a service without discriminating (Table 1.8). By 'delivering a service', we mean the services staff deliver to colleagues, clients and partners and the way they do their jobs across all areas of the organisation.

Table 1.7: **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=1,482) All respondents, Column percentages

Response options	
Very confident	32%
Confident	52%
Not confident	12%
Not at all confident	3%

Table 1.8: **In the past year, how confident have you felt to deliver a service without discriminating against others?**
(n=1,481) All respondents, Column percentages

Response options	
Very confident	45%
Confident	44%
Not confident	8%
Not at all confident	3%

Most (85%) staff respondents said they felt confident or very confident to deliver a service that reflects a human rights-based system (compared to 89% in 2022-23). 15% said they weren't confident. The majority (89%) of respondents said they felt confident or very confident to deliver a service without discriminating against others (compared to 93% in 2022-23). Around one in ten (11%) said they didn't feel confident about this.

Staff respondents left comments about what had helped them to feel confident to deliver a service in line with the Charter and to not discriminate against others. Examples included:

- holding personal values that focused on fair treatment and not discriminating,
- previous personal and professional experience,
- support from colleagues,
- a culture of equality and fairness within their team,
- and guidance and training received as part of their role.

Many described a personal commitment to treating others with dignity, fairness and respect. Some specified that they applied this behaviour to staff and partners as well as clients. Respondents commonly described an understanding of bias and a commitment to challenging this within themselves or asking colleagues for help in recognising this. Some viewed upholding the Charter values and not discriminating as a core part of their role.

"The Charter and my personal values shape my work practice." Staff respondent

"In my area, we are always striving to ensure that no-one would feel left out or discriminated against, both internally and externally. We take treating people with dignity, fairness and respect very seriously. Support for this comes from all levels, from administrative colleagues up to senior managers." Staff respondent

"I am always very aware of bias and always assess my work from an unbiased perspective. I often will outsource practitioner or peer support if I feel like I am not entirely certain of my Decision, to ensure that I am always treating the client fairly, and that Decisions are made considering the client and their needs at all times in a respectful and inclusive manner." Staff respondent

Some respondents described challenges and barriers to delivering a service in line with the values of the Charter. Examples included: high workloads and staff pressure, problems with internal tools and systems, and the service not being fully inclusive or accessible for all clients and staff. Some respondents said that internal processes and policies had made it difficult to uphold the Charter and the organisation's core values, including long application processing times. Comments suggested that some clients and staff were experiencing unfair treatment or discrimination as a result.

As in previous years, there was frustration that the Charter values were not always reflected in internal culture and treatment of staff. A couple of respondents felt the Charter was a 'tick-box' exercise and not fully embedded across the organisation. Some experienced further issues when trying to provide feedback about these challenges and barriers (staff experiences of feedback are covered in more detail in section 5.2). Comments called for improvements to internal culture and more training on equalities, human rights, and internal systems.

"Mostly because of aspirations, time constraints, staffing issues and waiting times I don't feel we are delivering the service we should to our clients." Staff respondent

"I endeavour to treat the clients that I support through the application process with dignity, fairness and respect. However, I feel that as an organisation we are not fully aware of the difficulties that some of our more vulnerable clients have in trying to fulfil the requirements of completing our application process. This is in particular around verifying identity." Staff respondent

"I try to do my job to the best of my ability in a non-judgmental, non-biased way bearing in mind the commitments set out in Our Charter. I have taken it upon myself to do this and it almost seems like a tick-box exercise for senior and direct management. Dignity, fairness and respect seem at odds with the way staff are treated at times." Staff respondent

2. Processes that Work: Partner experiences of using the service on behalf of clients

This chapter aligns with the second section of the Charter Measurement Framework and Our Charter. It looks at partner respondents' experiences of supporting clients to use Social Security Scotland's service in 2023-24. It covers their experience of getting in touch with Social Security Scotland and speaking to staff on behalf of clients. It also presents their experience of helping clients to apply for benefits, including experiences of the consultation process for Adult Disability Payment.

2.1. Partner respondents' benefit experience

Nine in ten (90%) partner respondents said they support clients or potential clients of Social Security Scotland (see Annex B, Table B1). These respondents were asked which Social Security Scotland benefits they had supported clients or potential clients with during 2023-24 (Table 2.1).

Partner respondents had commonly supported clients or potential clients with more than one Social Security Scotland benefit. Almost all (94%) had supported clients with Adult Disability Payment. Around three-quarters had supported clients with Child Disability Payment (74%) and a similar proportion had experience of Scottish Child Payment (71%). Fewer respondents had experience of Young Carer Grant (18%), Child Winter Heating Payment (15%) or Job Start Payment (7%).

Table 2.1: **Since April 2023, which Social Security Scotland benefits have you supported clients or potential clients with?***

(n=213) Respondents who support clients, Column percentages

Response options	
Adult Disability Payment	94%
Child Disability Payment	74%
Scottish Child Payment	71%
Best Start Grant	46%
Funeral Support Payment	41%
Best Start Foods	39%
Winter Heating Payment	25%
Carer Support Payment	25%
Young Carer Grant	18%
Child Winter Heating Payment	15%
Job Start Payment	7%

* Respondents could select more than one option

2.2.   Getting in touch with Social Security Scotland

Partner respondents who support clients or potential clients were asked about their experience of making contact with Social Security Scotland on behalf of clients (Table 2.2).

Table 2.2:   **How easy or difficult have you found making contact with Social Security Scotland on behalf of clients?**
(n=216) Respondents who support clients, Column percentages

Response options	
Very easy	7%
Easy	11%
Neither easy nor difficult	14%
Difficult	23%
Very difficult	37%
Don't know / Not applicable	8%

Around a fifth (18%) of respondents said it was easy or very easy to make contact with Social Security Scotland on behalf of clients. Three in five (60%) found it difficult or very difficult. Over one in ten (14%) said it was neither easy nor difficult. The wording of this question was changed between 2022-23 and 2023-24.[4] As a result, direct year-on-year comparison is not possible for these findings. It will be included in future reports if this question is repeated in future surveys.

In written comments, some partner respondents described positive experiences of contacting Social Security Scotland on behalf of clients. A few said they'd had no issues getting through on the phone and webchat service. Some said they had contacted Local Delivery staff on behalf of clients and gave positive feedback about this type of contact.

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[4] The 2022-23 survey of partners asked 'How easy or difficult have you found looking up or making contact with Social Security Scotland with or for clients?'. After consulting with Social Security Scotland's National Engagement and Corporate Communications colleagues, this was changed to 'How easy or difficult have you found making contact with Social Security Scotland on behalf of clients' for the 2023-24 survey.

"Getting in contact with [Social Security Scotland] has been easy."
Partner respondent

"Always had a positive response when phoning [Social Security Scotland] with very helpful staff. I have had some clients complain about wait times but haven't found this with my own experience." Partner respondent

"We contact our Local Delivery folks and they always deal with any issues our clients are facing. This is a very personal service which is valued and appreciated by our clients." Partner respondent

Negative and mixed comments were commonly about the time spent waiting to speak to an adviser by phone and webchat. Some respondents noted that waiting times for phone and webchat had improved, but others spoke of long waits and were dissatisfied with this aspect of the service. Some described long waiting times as frustrating and stressful both for them and for the clients they support. As in previous years, there were calls for a dedicated phone line or email service for partners who support clients, or dedicated phone lines for specific benefits. There were also suggestions to be able to call the relevant staff member or department directly when a call is disconnected or a call back is missed rather than having to use the main phone line again.

"The time it takes to get through to a member of staff is very stressful for both client and [third-party] staff member. There should be a separate number for [third-party] staff to contact as it takes hours of time to get through." Partner respondent

"I often call on the phone as well as try to contact on webchat at the same time with the client with me BUT it is a lottery who will answer first and only after sitting with the client for nearly an hour before I get answered." Partner respondent

> "[…] When getting a call back if I was not able to answer a message was left but with no direct number I then had to spend up to an hour phoning again."
> Partner respondent

There were further comments about Social Security Scotland's webchat service. Some respondents felt they got the information they needed over webchat. Others felt they didn't always get the information they were looking for. A few said they'd tried to use webchat but felt it hadn't worked successfully for them; either in terms of getting through to an adviser or getting the advice they needed.

> "[…] The webchat has always proven useful and the response has always been great from the staff." Partner respondent

> "[…] tried to use the webchat, but I didn't manage to get through to speak to anyone […] it just seemed to spin without me reaching anyone." Partner respondent

> "[…] information provided differs depending on who picks up the chat - no consistency on processes etc." Partner respondent

As in previous years, respondents described challenges to do with contacting Social Security Scotland as a third-party on behalf of clients. Challenges included: problems with security questions, and third-party consent forms being lost, delayed or rejected. Some respondents said long call waiting times made it difficult to get through to Social Security Scotland during their appointment with a client. However, they were often unable to speak to Social Security Scotland later without the client present due to these issues. Some said Social Security Scotland staff gave conflicting information about third-party consent and were inconsistent in their approach to accepting third-party representatives.

Suggestions for improvement included:

- an online option to submit third-party consent forms,

- for consent forms to remain valid for a longer period of time,

- a list of pre-approved third-party representatives like the Apollo List used by the Department for Work and Pensions,

- for partners to receive a direct call back where a third-party consent form is in place rather than calling the client,

- to be allocated a dedicated client adviser with previous experience and knowledge of the client's case to avoid checking the third-party consent form at every call.

"Even with a mandate in place, there are a significant amount of security questions, some of which I do not know (e.g. client's bank details). This is very frustrating for me and my clients, particularly after a lengthy wait. My clients are very ill and depend on us to make the process easy and quick but it can be very challenging dealing with Social Security Scotland regarding their claims." Partner respondent

"[…] There are often issues with Social Security Scotland accepting that I am calling on my client's behalf and with them accepting my mandate to do so as well." Partner respondent

2.3. Experiences with staff

Partner respondents who support clients were asked to rate their experience of speaking to Social Security Scotland staff on behalf of clients (Table 2.3).

Table 2.3: **How would you rate your experience of speaking to Social Security Scotland staff on behalf of clients?**
(n=217) Respondents who support clients, Column percentages

Response options	
Very good	21%
Good	27%
Neither good nor poor	16%
Poor	13%
Very poor	13%
Don't know / Not applicable	11%

Around half (47%) of partner respondents rated their experience of speaking to staff as good or very good (compared to 50% in 2022-23). Around a quarter (26%) rated it as poor or very poor and 16% said 'neither'. There was an increase in the proportion of respondents who selected poor or very poor in 2023-24 compared to 2022-23 (14%).

There was strong praise for staff in written comments, with respondents describing staff as helpful, friendly, patient, and knowledgeable. Many respondents said client advisers had dealt with their queries promptly. Respondents commonly noted that whilst it sometimes took a long time to get through on the phone, their experience with client advisers was often very positive when calls were answered.

"Prompt response, happy to help, and very knowledgeable." Partner respondent

> "Staff are friendly and knowledgeable. They make a big effort to be as helpful as possible and you feel as if they are listening to you and actually answering your question/s and not just sticking to a script which is the opposite what happens when speaking to the majority of Department for Work and Pensions staff. Social Security Scotland staff are a pleasure to deal with." Partner respondent

There was also wide praise for Local Delivery staff among written comments. Respondents commonly spoke of having good relationships and strong engagement with Local Delivery staff. They said Local Delivery staff were friendly, approachable, and wanted to help clients and partners. A few respondents found that Local Delivery staff gave limited or conflicting information or weren't always available to assist with queries. Partner respondents' views on the Local Delivery service are covered in more detail in section 2.4.

> "The Local [Delivery] team have made it their goal to be available and approachable and all my dealings with them have been positive ones." Partner respondent

> "My experience of dealing with our Local Delivery team has been very positive as they have been very understanding of and responsive to client needs."
> Partner respondent

> "Initially the local managers would contact [our] service letting me know who they were and if we had any queries to contact them for support. Currently don't know where the Local Delivery service are based." Partner respondent

Other comments said that staff were pleasant but didn't always have the right level of knowledge to help. Some respondents said they received conflicting information and experienced inconsistencies in helpfulness and knowledge depending on which staff member they spoke to. For example, some client advisers knew more than others about things like third-party consent, language interpretation, and processes for terminally ill clients. Some respondents said they had to wait while client advisers went to find the answer to a query. Some didn't mind this in principle but others felt that staff needed

better training. A few comments mentioned poor staff manner and feeling that staff weren't friendly or helpful.

> "Staff are polite and helpful but their knowledge is poor and a lot of time spent on hold when advisers are speaking with their colleagues for help and support." Partner respondent

> "It depends who you get on the phone whether the experience is good or bad. I have had absolute incompetent conversations with staff who are untrained, unhelpful and unknowledgeable, to staff who are very effective and go out of their way to be helpful." Partner respondent

> "Speaking with Social Security Scotland regarding the transfer of Personal Independence Payment to Adult Disability Payment when special rules became appropriate for my client when it was not being processed with appropriate timescales. Advisers I spoke with (not in the Special Rules for Terminal Illness team) didn't seem to understand the nature of my call and I was often promised call backs which I did not receive. When eventually I [got] to speak with Special Rules for Terminal Illness team they were more than helpful." Partner respondent

2.4. Applications

Partner respondents who support clients were asked about their experiences of going through the application process with or for clients (Table 2.4).

Table 2.4: **How easy or difficult have you found going through the application process with or for clients?**
(n=217) Respondents who support clients, Column percentages

Response options	
Very easy	7%
Easy	26%
Neither easy nor difficult	24%
Difficult	22%
Very difficult	7%
Don't know / Not applicable	13%

Around a third (34%) of respondents said it was easy or very easy to go through the application process with or for clients (compared to 32% in 2022-23). Slightly fewer said it was difficult or very difficult (29%), or 'neither' (24%). There was a decrease in the proportion saying it was difficult or very difficult in 2023-24 compared to 2022-23 (36%). Most of this change was due to a higher proportion selecting 'don't know/not applicable' in 2023-24 (13%) compared to 2022-23 (1%).

The vast majority of written comments related to applications for Adult Disability Payment and Child Disability Payment. Where respondents mentioned other benefits, such as Best Start Grant and Scottish Child Payment, comments tended to be positive and described applications as easy to access and simple to complete.

"Scottish Child Payment, Best Start Grant and Best Start Foods applications are very easy […]" Partner respondent

On Adult Disability Payment and Child Disability Payment, positive comments said application forms were straightforward to complete on clients' behalf, especially online

applications. Many felt the online application was quicker and easier to complete than the paper form. A couple preferred the paper form as they could easily skim through it with clients to help them understand which questions were coming next. As in previous years, respondents said it was difficult to scan or photocopy the paper form and that perforated edges would be helpful. Some respondents said both the online and paper applications were laid out clearly and questions were easy to understand.

> "Completing applications is easy as the forms are clearly set out - whether that's online or paper." Partner respondent

> "[…] the online version takes at least half an hour longer [to complete] and is difficult sometimes to work out the correct place to put information which doesn't directly answer the questions but is relevant to the claim […] the paper form can be flicked through and you can therefore check if there are other, better places to put the information before you write it in what may turn out to be the wrong place […]" Partner respondent

Negative and mixed comments commonly said application forms for Adult Disability Payment and Child Disability Payment were complex and took a long time to complete. Some respondents said application questions were repetitive, not relevant, or didn't allow clients to accurately explain their or their child's condition. Some said the clients they supported had found the application difficult and overwhelming to complete, even with third-party support. Comments described how clients' wellbeing had been negatively impacted in some cases when completing the application.

> "Adult Disability Payment form is just too long, especially for clients with complex disabilities, mental disabilities or learning difficulties. Clients are distressed and anxious at the prospect of going through it […]." Partner respondent

> "I feel that the paper version of the Adult Disability Payment application can be very lengthy and it can take two sessions with a customer to complete this, especially if they have many health conditions and are very ill. The online application is a bit quicker, but still lengthy. I also feel that some of the questions become very repetitive and it can feel that a duplication of information is being provided."
> Partner respondent

There were mixed comments about guidance contained within applications for disability benefits. Some respondents praised the fact that additional information and images were embedded within the form itself. Others felt the extra information made the application seem large and overwhelming for clients. Some felt the guidance could be clearer about what to include and how to answer questions.

> "Online forms themselves are straightforward and the extra steps taken to explain questions and how to answer is helpful for explaining to clients what is being asked of them. Inclusions of pictures in the Adult Disability Payment form, for example, is helpful for clients who struggle to read or to take in information." Partner respondent

> "[…] I do find the form awkward and cumbersome. I absolutely understand wanting to explain things more fully and prompt people but it is overwhelming and I think the form needs to be streamlined […]." Partner respondent

Partner respondents left mixed comments about their experience of using the mygov.scot online portal when supporting clients to apply. Some were positive about the portal in principle but experienced technical problems when creating mygov.scot accounts and security issues when trying to access the portal for clients. Respondents also reported mixed experiences of submitting supporting information online for clients. Some said it was easy to upload supporting information and were pleased that this could be added online after the application had been submitted. Other respondents experienced technical problems when uploading supporting information and some said uploaded information had gone missing. Some said they were unable to download a copy of the completed application form and were dissatisfied with this.

"[…] The portal for submitting supporting docs is great - when it works!"
Partner respondent

"I have had many issues with creating accounts where a client has a mygov.scot account or their address or email has been previously used for mygov.scot. This prevents an account being made and being unable to apply online. The issue can sometimes be resolved by IT if a form is submitted however this takes time […]."
Partner respondent

Some partner respondents left comments about their views on Social Security Scotland's Local Delivery service. Respondents commonly described Local Delivery as a useful service for clients to get help to apply. There were positive comments about clients receiving Local Delivery support to complete applications for disability payments.

"Local Delivery team worker made the process a lot easier, supporting my client to fill in the application. But the form itself is overwhelming, and takes a considerable amount of time to fill in." Partner respondent

Some comments mentioned difficulties making Local Delivery appointments on behalf of clients. Issues included: long waits when trying to book an appointment via Social Security Scotland's phone line, not knowing how to confirm or check booking details before the appointment, and appointments not always being available. Respondents called for the ability to refer clients directly to the Local Delivery service and an online option for making appointments. Other suggestions included: a contact number or email address for partners to contact Local Delivery directly, and to waive the need for a third-party consent form when arranging appointments on clients' behalf. A couple of respondents said the Local Delivery service could be better promoted as not all clients knew about it.

"The Local Delivery officer is excellent. It might be worth allowing claimants to request this online as well as over the phone." Partner respondent

"We have a Local Delivery team who sits a few feet away but we cannot refer directly to them and have to go through [the] phone system. This is a waste of time and resource when they could easily speak directly with us and make their own appointments." Partner respondent

"The appointment service has improved but could still do with more appointments. Still difficult to contact by telephone." Partner respondent

2.5. Consultations for Adult Disability Payment

If a client has applied for Adult Disability Payment, Social Security Scotland will aim to make a decision based on the client's application form and supporting information. In some cases, Social Security Scotland may ask a client to take part in a consultation to get extra information. A consultation is a conversation with one of Social Security Scotland's health and social care practitioners. The consultation is a chance for the client to talk to Social Security Scotland about how their condition or disability affects their life. It helps Social Security Scotland to make a decision on the application. A consultation is not a diagnosis or medical examination of the client's condition, and only covers areas of the application that Social Security Scotland needs more information about. Consultations can be done by phone, by video call, at a local public venue, or in a client's own home.

Partner respondents who had supported clients with an Adult Disability Payment consultation were asked whether client wellbeing had been protected and prioritised during the process (Table 2.5).

Table 2.5: **How much do you agree or disagree with the following: Social Security Scotland protected and prioritised client wellbeing during the Adult Disability Payment consultation process**
(n=80) Respondents who support clients, Column percentages

Response options	
Strongly agree	13%
Agree	26%
Neither agree nor disagree	29%
Disagree	16%
Strongly disagree	8%
Don't know / Not applicable	9%

Almost two in five (39%) respondents agreed or strongly agreed that client wellbeing was protected and prioritised during the consultation process. Around a quarter (24%) disagreed or strongly disagreed, and a similar proportion said 'neither' (29%). Year-on-

year trend analysis is not available for these findings due to the low number of respondents (n=22) who answered this question in 2022-23. It will be included in future reports where possible.

Written comments about consultations were largely positive. Partner respondents saw consultations as an opportunity for clients to express themselves and to fully explain how their condition affects their life. Consultations were described as being short, client-centred, and only asking relevant questions. Respondents said staff working on consultations were compassionate, empathetic, professional, and genuine. They said clients had felt heard and understood during the consultation. In one example, a respondent said their client was reassured and offered breaks during the consultation and received a call beforehand to explain what to expect.

“Client was offered opportunity to take a break and was constantly reassured. Tone was non-threatening and informal. Client got call before the assessment to make sure all was okay and to explain what would happen.” Partner respondent

“I have only supported one customer with a consultation and this took place over the phone. They were asked relevant questions to the application, it did not cause them any distress, and it gave them an opportunity to clarify what the impact of their conditions were on their life.” Partner respondent

Negative and mixed experiences included an instance where a client received a call unexpectedly from Social Security Scotland about a consultation. Some respondents highlighted long waits for clients between submitting an application and being invited to a consultation and thought the overall process could be shorter. In some cases, respondents said clients’ needs weren’t fully understood or accommodated during the consultation process.

“The person I was supporting got a surprise phone call stating that they were calling her for her assessment.” Partner respondent

"They [protected and prioritised client wellbeing] while I was there to assist my clients and could explain their communication and understanding abilities. However, when consultations were carried out without [my] support, assumptions were made and information from the client was misunderstood as the Social Security Scotland worker had no understanding of the client's limitations. Anyone who identifies as having a learning disability or autism should be asked if they want to have someone they know and trust to assist them." Partner respondent

Some respondents were unsure of the distinction between consultations and other forms of contact made by Social Security Scotland during the application process for Adult Disability Payment. Respondents said the consultation process could be better explained and publicised to clients and partner organisations. There were also suggestions for clients to be able to request a consultation if they felt it would help with explaining their condition, especially for clients with multiple conditions.

"This process needs to be explained to both clients and organisations that support clients." Partner respondent

"Sometimes a consultation would be more appropriate than a case manager calling […] if there was an option on the form for a client to state this is something they feel they would like to have, I believe I have had clients who would have stated this. Clients with multiple medical complaints should be considered for this […]." Partner respondent

2.6. Decisions

Some partner respondents left comments about the decisions clients had received. They said decision letters were straightforward and easy for clients to understand. A couple mentioned the transparency of decision letters and felt they clearly explained the reasons for decisions. Some felt this was open and honest and gave the client more context to challenge the decision if they disagreed with it.

"I think the decision letters are always very thorough in openly communicating the reasoning for your decisions, to help clients understand." Partner respondent

"I've yet to receive a decision that I can't understand (regarding Adult Disability Payment and Child Disability Payment) - I may disagree with them but there's always reasoning behind it which at least allows for debate/challenge at [the] re-determination stage." Partner respondent

Partner respondents commonly left comments about the length of time taken for clients to receive decisions, specifically for disability benefits. Some said a long wait for decisions was one of the only negative aspects in an otherwise positive experience of the service. A couple of respondents felt that delays were to be expected with the launch of new benefits. However, many comments expressed dissatisfaction with application processing times. Some respondents also spoke of waiting longer than anticipated for decisions following a re-determination. Many comments highlighted the negative impact of long waits on client wellbeing and expressed a desire for shorter processing times overall.

"The only drawback is the lengthy waiting times for decisions to [be] made and [re-determinations] not being looked at within the required timescales. However, it is appreciated that there has been a large volume of applications as would be the case with the roll out of any new benefits." Partner respondent

"[…] I am desperate to get an award for my client who has been waiting for his claim to be approved [for eight months]. […] I feel that he has been denied his dignity." Partner respondent

"[…] Social Security Scotland had a huge opportunity to get this right with all the years that they spent speaking to organisations and individuals about their experiences with the Department for Work and Pensions before the major benefits like Child Disability [Payment] and Adult Disability [Payment] started. The onus was being taken off the client to provide evidence, consultation with the client was going to be minimal, award timescales were going to be quicker. We want the right decision for our clients but even after several months of delays in a decision being made it often isn't the right one. Consultations [are] taking place several months after the initial application. If the move is from Disability Living Allowance or Personal Independence Payment then that decision is taking even longer. We have some who have waited over a year before a decision has been made."
Partner respondent

Similarly to previous years, partner respondents called for a third-party escalation route for applications that have encountered problems or need to be processed quickly, such as for vulnerable clients. Many were frustrated by the lack of escalation route offered to partners and felt this needed to improve. Some felt an escalation route, coupled with more systematic and joined-up communication with partners, could help to solve cases where issues had arisen or where an urgent decision was needed.

"You need an escalation route for advisers so problems are resolved in days, not weeks or months." Partner respondent

"[…] failure to introduce an escalation route for third-party representatives for very vulnerable clients often resulting in catastrophic consequences for customers e.g. disability benefit being stopped and this having a knock-on effect of reducing other benefits they have and this resulting in distress/stress to the customer and leading to mental and physical harm." Partner respondent

"I think if workers have more scope to contact that would be helpful. A lot of the time we have useful info to support with applications." Partner respondent

2.7. Accessibility of Social Security Scotland's service

This section looks at the accessibility of Social Security Scotland's service and any additional support that could be put in place to help clients.

Partner respondents who work with clients were asked how accessible they thought the service was for clients (Table 2.6).

Table 2.6: **How accessible do you think the service is for clients?**
(n=216) Respondents who support clients, Column percentages

Response options	
Very accessible	16%
Somewhat accessible	60%
Not at all accessible	17%
Don't know / Not applicable	6%

Three in five (60%) respondents said the service was somewhat accessible (compared to 62% in 2022-23). Around one in five (16%) said the service was very accessible and a similar proportion (17%) said it was not at all accessible (compared to 17% and 18% respectively in 2022-23).

Positive comments described the service as user friendly and accessible for clients. Respondents gave examples of what made the service accessible. Examples included: clients having multiple ways to apply including online, by paper, or phone; a choice of ways to contact Social Security Scotland; simple processes for uploading supporting information; and the availability of interpretation and information in languages other than English. Some respondents felt application forms were accessible and that this had been prioritised in their design.

"You have paper claims and online - very accessible." Partner respondent

> "There has clearly been thought put into the accessibility of the forms and the various options made available for applicants. I'm sure there will be ways it can be improved but from my observations it seems clear that this topic was thought about during the creation of the various forms." Partner respondent

Some respondents said Local Delivery support had made the service more accessible for clients. They felt that Local Delivery home visits and face-to-face appointments in local venues were accessible ways for clients to get support to apply. A few respondents mentioned the Independent Advocacy Service delivered by VoiceAbility[5] and Social Security Scotland's ability to directly refer clients to this service. Comments said the service was a positive way for clients with a disability or health condition who need support to communicate to access and apply for Social Security Scotland's benefits. Some felt the advocacy service should be promoted more to clients.

> "People can request for [the] Local Delivery Team to help them in a community venue, or at their home. I do appreciate VoiceAbility being given as an option for help with application for Adult Disability Payment so that clients have choice." Partner respondent

> "The various options (paper application, phone, online, Local Delivery) make it very accessible I believe. However, I believe greater exposure to the clients of the available Advocacy support (VoiceAbility) would improve accessibility even more." Partner respondent

Mixed and negative comments commonly noted that Social Security Scotland's service was accessible for most clients but not all. Many respondents said the clients they support had relied on help from third parties in order to access the service. A few

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[5] VoiceAbility is a charity with experience in delivering independent advocacy services. It is separate to Social Security Scotland and the Scottish Government. The Independent Advocacy Service provides free and independent advocacy to anyone who identifies as disabled and requires support to communicate. Clients can access this support by contacting VoiceAbility directly or by calling Social Security Scotland and asking to be referred to the Independent Advocacy Service.

respondents said that whilst the service wasn't fully accessible, they felt the organisation was committed in its approach to prioritising and improving accessibility.

> "Most of our clients are not capable to fill [out the] application form on [their] own." Partner respondent

> "People can apply for benefits from their phones while at home. Most people have access to a smartphone, or a friend or family member does. For the rest, they can use Citizens Advice Bureau or another service to link them in. Social Security Scotland has done a lot to inform the public about benefits they might be entitled to and how they can go about applying. Unfortunately there will always be some folk that slip through the net but you are tackling it proactively." Partner respondent

Others mentioned negative experiences of accessibility. Examples included: problems with interpretation in practice, issues with three-way calls, difficulties going through the security process at the start of calls, and staff guiding clients to apply online instead of using their preferred method. Many respondents mentioned examples of digital exclusion. They said the service was easily accessed by clients who were able to use online methods, but less accessible for those who didn't have digital skills or couldn't access online information and applications.

> "Clients [are] often advised to go online to apply when this is not accessible to them. One call handler notified a client that paper forms weren't being sent out anymore which is untrue." Partner respondent

> "Unfortunately so many clients don't have access to internet facilities and are unable to travel to local libraries." Partner respondent

Partner respondents made further comments about the barriers experienced by clients when trying to access the service and its benefits. Some felt the delay getting through to an adviser was a barrier to accessing information and applying by phone. They said this had led some clients to use an alternative application route they weren't

comfortable with. Others said the length and complexity of application forms for disability benefits had deterred some clients from applying in the first place.

> "It is fine if the customer has digital skills and access to allow them to make a claim online. But the length of time taken to get an answer on the phone to make an initial claim, or to ask for local Client Advisor assistance to make a claim, is a barrier to claiming for the customer group I deal with […]." Partner respondent

> "All information is straightforward, but this can mean that the forms are very lengthy and I am aware that this has put some people off from claiming […]."
> Partner respondent

2.8. Additional support for clients

Staff and partner survey respondents, as well as Client Experience staff participants, suggested improvements to Social Security Scotland's service. Comments were about improving communication for clients and making changes to the application process. Suggested improvements to communication included: extended helpline and webchat opening hours; to download a copy of webchat conversations; for staff to be able to leave voicemails with clients' permission; and for clients to receive SMS updates about the progress of their application. Some staff and partners thought a call back service would be useful for clients when phone lines were busy. Client Experience staff participants mentioned that it would be helpful for clients to know their queue position on a call.

> "The webchat is a most useful way to assist as it offers the option instead of waiting on a phone line. It would be great if the hours of this could be extended to take into account individual's working hours." Partner respondent

> "One suggestion was to ask clients for their permission to leave voicemails. This would enable detailed messages to be left and, therefore, reduce the amount of incoming calls from clients to ask why they were called […]." Staff respondent

> "I spoke to a client where their anxiety was so severe that they tried calling but they didn't know how long they were going to be on the call for. So they just had to hang up. I think you should be able to see where you are in the queue […] especially for those with anxieties because you don't know how long you're going to be on the phone for." Client Experience staff participant

As in previous years, there were suggestions to provide a secure email service as a communication option for clients. A few staff respondents suggested that outgoing calls to Adult Disability Payment and Child Disability Payment clients could be carried out by Social Security Scotland practitioners. They believed these colleagues had the clinical training and experience to deliver a more informed service to this client group.

"We get a large amount of requests to communicate by email which would help clients who struggle with phone calls." Staff respondent

"Not medically trained. Feel [it] should be practitioners who call [clients] as they are medically trained to handle these calls with [the] professionalism and sensitivity that is required." Staff respondent

Staff and partner respondents also suggested improvements to the application process for Adult Disability Payment and Child Disability Payment. These included: the ability to access forms without having to register first either online or by phone, having a named case worker throughout the process, and the option to complete the first and second parts of the application across different formats (for example to do the first part by phone and complete the second part online). Similarly to previous years, there were calls for an online option for submitting re-determinations. Staff and partner respondents also called for benefit information and application guidance to be made available in a wider variety of formats including video and animation.

"By allowing access to claim forms without the need to register a claim either online or by phone." Partner respondent

"For the most part access is good. There can be issues when customers start a process online but then wish to abandon this channel and complete applications on paper, or vice versa. More could be done to make the application process flexible to suit the needs of customers." Partner respondent

"Most information [and] resources are clear and accessible and available in multiple community languages. I would like to see more videos and animations with the key information for clients to raise further awareness of processes in a more accessible way than predominantly print." Partner respondent

Partner respondents made suggestions about how the Local Delivery service could provide additional support for clients. Many called for clients to be able to contact Local Delivery directly rather than going through Social Security Scotland's main helpline. Some felt the service should be better promoted when clients contact Social Security Scotland. Other suggestions included: a tick-box on the first part of an application to ask for support with part two, in-person appointments to be offered more widely, and the provision of more drop-in sessions for clients.

> "Older people have great difficulty hearing on the phone and going online. Face-to-face would be best for this client group." Partner respondent

> "[…] At the very least ensure that your website offers the option to request a call from the Local Delivery team and ensure every call to your national number is offered help from the Local Delivery team. That does not happen at present - a client must know in advance about the local team and request it themselves as they are not told about it or offered the support." Partner respondent

Other staff and partner suggestions were about making improvements to application forms for disability benefits. These included: more use of simplified language and plain English, multiple choice questions, and larger spaces to write in answers on paper forms. There were many calls across staff and partner respondents, as well as Client Experience staff participants, for online application forms to allow clients to better explain their condition in more detail. They felt this was particularly relevant for clients with unseen, variable, or multiple conditions. Similarly, there were suggestions to increase the character limit within online review forms so that clients could provide more detail during this process. Other suggestions included: the ability to save a copy of the completed application on mygov.scot accounts, and shorter versions of forms for third parties or Local Delivery to use with clients.

> "I wonder if some more multiple choice questions could be included to help people who struggle to write, and if language could be simplified further."
> Partner respondent

"Most of the applications are simple and straightforward, but the Adult Disability Payment claim is very longwinded and lacks the option/section to add 'any more information'. This would be useful to allow further explanation, especially in unusual cases." Partner respondent

"[…] I think introducing a short form without the same prompts should be an option for people who are getting help to complete the form either by Social Security Scotland or a welfare rights team." Partner respondent

"It would be great if a copy of applications could be retained in the person's mygov.scot account for future reference." Partner respondent

3. Processes that Work: Experiences of re-determinations and appeals

This chapter looks at Client Experience staff participants' insight into the re-determinations and appeals that took place in 2023-24. It covers common reasons for re-determinations and appeals, reasons why decisions were or were not changed, and their experiences of the re-determinations and appeals processes. It aligns with the second section of the Charter Measurement Framework and Our Charter.

If clients disagree with their benefit decision they can ask Social Security Scotland to look at their application again. When a client challenges a decision, the application is reviewed by a separate team at Social Security Scotland. This team looks at the original application and any supporting information and makes a new decision. If a client disagrees with the new decision, they have the right to appeal to the Social Security Chamber of the First-tier Tribunal for Scotland. The Tribunal are independent to Social Security Scotland and will make a decision on the appeal.

Re-determinations, and any subsequent appeals, can be requested for all benefits except Best Start Foods and Job Start Payment. Clients can instead ask for an internal review if they disagree with a decision on one of these benefits.

3.1. Reasons for re-determinations

Client Experience staff who participated in focus groups were asked to share some of the common reasons why clients had challenged a decision.

For Adult Disability Payment and Child Disability Payment, re-determinations were commonly requested where clients felt they should have been awarded a higher rate of benefit. For example, some Child Disability Payment clients were unaware of the age and mobility criteria for different benefit rates and had challenged a decision on this basis. Client Experience staff participants said they were able to explain the criteria to clients during the re-determination process. Other reasons included: clients being denied the benefit but feeling they met the eligibility criteria, and a lack of clarity in the decision letter on why the client was denied or awarded a lower rate than expected. Re-determinations were requested in some cases where the original application or supporting information had not been considered in detail. Participants said decisions

were changed in cases where further supporting information was supplied or where existing information was reviewed in more detail.

> "With Child Disability Payment, it's to do with clients feeling the award should be higher. When we find a lot coming through for mobility, it's because they are unaware of how the high rate and the low rate works and that it's dependent on the age and stage of development of the child. A lot of clients are unaware that they can't get low rate mobility when the child is under 5. Sometimes it's maybe how the decision letter has been worded to them on their original decision. They then ask for a re-determination on the mobility side because they've been told they're not eligible based on the criteria." Client Experience staff participant

> "Occassionally it could be that the supporting information hasn't been fully looked at by the original decision maker. It could be a unique situation or condition. It's possibly not been understood correctly or looked at completely. With those, I'll do a case discussion where I'm unsure because of a unique condition."
> Client Experience staff participant

> "It could be that they've now sent us additional supporting information that we never had with the original application. Or where a client's situation and condition becomes clearer after a case discussion." Client Experience staff participant

For other benefits like Scottish Child Payment and Funeral Support Payment, re-determinations were commonly requested where clients had their application denied because they exceeded the income threshold, or it wasn't clear whether they were in receipt of a qualifying benefit. Decisions were changed where there was evidence to show receipt of a qualifying benefit or that a client's income did not exceed the threshold.

"With Low Income Benefits, it's quite straightforward. A lot of the time it's to do with qualifying benefits. For example, if a client's qualifying benefit has been stopped or reduced. If the award has been denied, it could be because it's not picked up the client's qualifying benefits, or they don't have a qualifying benefit, or they're over the threshold. Or they might be on a qualifying benefit but our system has done an automatic decision and then we've had to go in to manually check and ask for supporting information." Client Experience staff participant

For benefits involving children and families[6], clients had challenged decisions where it was unclear who had main caring responsibility for the child. Decisions were changed in cases where supporting information became available to prove that the client had main responsibility for the child.

"Another one would be if the system didn't pick up their responsibility benefit for the child or we haven't got sufficient information. We've not got the information we need." Client Experience staff participant

"If a decision has been changed, it's where we've been given additional information." Client Experience staff participant

3.2. Reasons for appeals

Client Experience staff participants said there were a range of reasons why clients had asked to appeal their decision following a re-determination. Common reasons for appeals included: clients feeling they weren't given an explanation for an unsuccessful application or re-determination, not receiving the benefit rate they expected, or not being able to provide the necessary supporting information until the appeal stage. Others had appealed in cases where they were awarded a lower rate of benefit following a re-determination compared with the original award. Some Adult Disability Payment and Child Disability Payment cases had led to appeals where the client's

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[6] Social Security Scotland delivers five family payments: Best Start Grant Pregnancy and Baby Payment, Best Start Grant Early Learning Payment, Best Start Grant School Age Payment, Best Start Foods, and Scottish Child Payment.

condition wasn't fully considered at either the original application or re-determination stages, or where their condition had deteriorated since the original application.

> "There are quite a lot of reasons but one example is clients not being given a full and thorough explanation for their original decision or re-determination. The re-determination might say they've not provided additional information and that's why they've not been awarded, but it doesn't add explanation as to why specifically they don't meet the criteria or qualify for an award. Sometimes that's not clearly explained." Client Experience staff participant

> "Another common reason [for appeal] is that there can be a discrepancy between the original decision and the re-determination. In some cases, someone will be given a certain rate at the original decision and then request a re-determination hoping to receive a higher rate. But a re-determination is a full re-assessment of everything. We've had cases where people have had a high award initially and then a case discussion brings up information that means they might get a nil award at the re-determination stage." Client Experience staff participant

> "Some things are quite easily missed in the online application and in the decision-making guidance. For example, the online application form doesn't give opportunities to explain toilet needs. Clients don't realise that managing toilet needs also includes getting on and off an adapted toilet. Questions aren't asked about whether someone needs a grab rail or anything to help them stand up. Clients don't always put that in the application. If they're not asked about this directly, it's something clients won't be aware of. The best way to deliver this benefit with dignity, fairness and respect is to go in with the position that clients are not experts on filling out the form or what the benefit is." Client Experience staff participant

Participants said decisions had been changed where supporting information became available at the appeals stage. Decisions were also changed where appeals found that supporting information was missed by Social Security Scotland at the original application and/or re-determination stages. For Adult Disability Payment and Child Disability Payment, participants said that appeals hearings often allowed clients to describe their or their child's condition in more detail. Clients may be asked additional questions during an appeal that aren't covered at the application or re-determination

stages which can provide more information about their life. Participants said decisions were changed where it became clear that clients were eligible for a disability benefit, or a higher rate of benefit, based on the information gained during a hearing.

> "Hearings are an opportunity to ask a lot of questions that decision makers may not ask clients. To ask for a full picture of people's lives. The application form is designed to allow people to tell us certain things but sometimes people don't know what we mean by certain questions. Further discussions can lead to a change in decision. Clients being asked about their lives can bring out more information."
> Client Experience staff participant

> "It will often be the case that clients will come all they way through to appeal and then they'll finally present further supporting information that can be used. The Tribunal have the power to order people to get supporting information and a full GP summary. People think Social Security Scotland are able to access full medical records but we have quite a limited data sharing agreement."
> Client Experience staff participant

> "A bit of supporting information might have been missed [when making a decision on the original application or re-determination] or the case discussion has been quite narrow. The decision maker has maybe missed something on the form or something on the decision-making guidance has been missed, it's human error."
> Client Experience staff participant

3.3. Reasons for upholding decisions following re-determinations or appeals

Client Experience staff participants were asked to share some of the common reasons why decisions had been upheld following re-determinations and appeals. Across all benefits, this was common where a client did not meet the eligibility criteria for the benefit or where supporting information was not received at either the re-determination or appeals stage. Benefit rates remained the same, or were reduced, where there was a lack of supporting information. Decisions were also upheld where clients weren't in receipt of a qualifying benefit or didn't have clear responsibility for a child when applying for benefits involving children.

"With re-determinations it could be that the decision has been made correctly and the client is not providing any other supporting information. We're only able to base it on the information we already have. From that information, and possibly a case discussion [for disability benefits], it's clear that the decision can't be changed."
Client Experience staff participant

"In appeals sometimes we just have it right the first time. All the information has been provided but they just didn't fit the criteria. It must be frustrating for the client at the end of the process. But there are times when the original decision was right."
Client Experience staff participant

"For Scottish Child Payment, it's often about who's caring for the child and it's sometimes quite a difficult thing for people to provide supporting information for. So that often leads to appeals hearings where it's an open discussion about people's circumstances. Which we wouldn't do ourselves [in Social Security Scotland]. It needs to be done in a better managed space. That's something that comes up in appeals. Decisions will be upheld or changed depending on that discussion."
Client Experience staff participant

3.4. Re-determinations and appeals processes

Client Experience staff participants were asked how the re-determinations and appeals processes are working for clients and staff. They felt the re-determination process was working well overall and described recent improvements such as clearer letters to explain the reasons for re-determination decisions. Participants thought it would be helpful if original decision letters also contained clear and detailed explanations about the first decision. They also felt the re-determination process could be better explained to clients before they enter into the process, especially when contacting Social Security Scotland over the phone to query or challenge a decision.

"We have now got a Quality Team in place to make sure re-determination outcome letters have clearer reasons for decisions. The letters are more structured with more detail about reasons why they didn't qualify for the benefit or certain rates. So the applicant knows the exact reasons for the outcome and it could possibly prevent appeals." Client Experience staff participant

> "Sometimes when clients call up, client advisers automatically do a re-determination without clarifying whether the client is debating a decision or just making a query. We then have to explain to the client that they are entering a full re-determination which could change the award, and once it's started it can't be stopped. These cases are few and far between, but I think if it was explained more at the time to the client when they first ring up they might not go ahead with it."
> Client Experience staff participant

Participants had helped clients during the appeals process where possible and often received calls from clients to check on the progress of their appeal. Participants said clients often attended their appeal hearing, but there had been cases where clients had not attended due to stress and anxiety around the process or a lack of clarity over how to join the hearing over the phone.

> "Sometimes appeals are complicated. The Scottish Courts Tribunal Service are completely separate to us, but we quite often get calls from clients to check on progress. We pass clients the contact details for the Scottish Courts Tribunal Service and say they need to go to them. We can still advocate and make sure clients get fair representation and that we do things correctly. I think clients' experience has been positive on a whole because we try to help them through the appeals process and we offer advice on hearings and things where we can. […] It can be a confusing process for clients but we do our best to help them through it."
> Client Experience staff participant

> "Clients are sent a notification letter that says this is the phone number you need to call and this is the passcode you need to enter. A lot of them seem to think the Tribunal is going to call them. The Tribunal will sometimes call the client to remind them about the hearing, but sometimes the decision will just be made and the client might not join the hearing. A lot of people are just really anxious and they don't want to turn up. It's a very stressful thing. Sometimes it's been 18 months since they applied and they are exhausted by that stage. Some have representatives that attend in their stead. Most do turn up." Client Experience staff participant

Client Experience staff participants said they felt confident working on re-determinations and appeals. They said case discussions[7] helped them to feel confident about making accurate decisions for disability benefits at the re-determination stage. However, they said the marked increase in appeals in 2023-24 had been challenging at times and had led to constantly changing processes. Participants said there were mechanisms in place for staff to provide feedback about the re-determinations and appeals processes. They felt that whilst feedback often led to change, there were also times when suggestions weren't listened to or actioned.

> "If the original decision is a denial, that's the kind of situation where a case discussion will be held. I always do that to make sure that the decision I'm making is the correct one […] When the case discussion has been done, I'll have a better understanding of the situation and the right decision."
> Client Experience staff participant

> "I don't have any issues, the [re-determination] process is fine for me, it's structured and I know what I have to follow. I'm quite happy with it. It's quite easy for me."
> Client Experience staff participant

> "In appeals, the process has massively changed over the last year. There weren't many appeals before and it used to be a slow pace. Now there's an influx of many more appeals. Sometimes people in the appeals team can feel like they're standing on constantly moving ground. The process is changing and constantly being refined because we need to catch up and find the best ways of working."
> Client Experience staff participant

> "I've fed back to senior team leaders in the past and things have been escalated and led to changes in policy so that was very positive. But in some other situations you feed things back, but I feel like it gets diluted and distilled once it goes through different people. It seems to get lost, even simple changes and small steps to improve." Client Experience staff participant

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[7] A case discussion is when the staff member carrying out the re-determination requests formal advice from a specialist adviser to help them make a decision. A specialist adviser could be a Social Security Scotland practitioner or someone from the Decision Support Team in Social Security Scotland.

4. Working for Social Security Scotland: Staff experiences

This chapter looks at staff respondents' experience of working for Social Security Scotland in 2023-24. It covers staff knowledge, experiences of training and guidance, support for staff, and experiences of communication. It aligns with the first section of the Charter Measurement Framework and Our Charter.

4.1. Knowledge and skills

The survey of staff asked all respondents how confident they felt in their knowledge and skills to do their job (Table 4.1).

Table 4.1: **In the past year, how confident have you felt in your knowledge and skills to do your job?**
(n=1,485) All respondents, Column percentages

Response options	
Very confident	27%
Confident	56%
Not confident	15%
Not at all confident	2%

Most (83%) respondents said they felt confident or very confident in their knowledge and skills to do their job (compared to 82% in 2022-23). Under a fifth (17%) said they didn't feel confident.

Written comments described a range of things that made staff respondents feel confident in their knowledge and skills. Common examples included: receiving advice and feedback from colleagues and managers, practical experience gained over time, and continuous informal learning such as peer-to-peer knowledge sharing. Many knew where to look for further support or information where needed and felt comfortable asking for help. Some respondents said formal guidance and training received as part of their role had helped them to feel confident. Experiences of training and guidance are covered in more detail in section 4.2.

"I have support of colleagues and we discuss and learn together as well as keep abreast of guidance and updates from management to have the latest instruction." Staff respondent

"High end of confident. Gaining this due to experience and knowledge and familiarity of systems." Staff respondent

Where respondents didn't feel confident, examples were about a lack of peer or manager support, problems with training and guidance, and unclear responsibilities within their role. Some respondents said frequently changing priorities, processes and policies alongside high workloads made it difficult to keep their knowledge up to date and undertake their role with confidence.

"Too much change in teams and unsure of where responsibilities lie / what is in your job remit […]." Staff respondent

"Constant changes and pressures mean we do not have the time to keep up to date with guidance updates, process changes and more importantly our clients' needs […]." Staff respondent

Staff respondents who said they interact with Social Security Scotland clients as part of their job, or will do so in the future, were asked to rate their knowledge of the social security system in Scotland (Table 4.2).

Table 4.2: **How would you rate your knowledge of the social security system in Scotland?**

(n=966) Current and future client-facing staff, Column percentages

Response options	
Very good	23%
Good	55%
Neither good nor poor	17%
Poor	5%
Very poor	1%

Over three-quarters (78%) rated their knowledge as good or very good (compared to 73% in 2022-23). Under a fifth (17%) felt it was neither good nor poor. Very few (5%) rated their knowledge as poor or very poor. There was an increase in the proportion who selected good or very good in 2023-24 compared to 2022-23 (73%). Most of this change was due to fewer respondents selecting 'neither' in 2023-24 (17%) compared to 2022-23 (21%).

Staff respondents left comments about what had helped them to feel knowledgeable about the social security system. Some said internal guidance, self-directed learning, peer support, and training had been helpful. Other examples included: experience gained in current or previous roles, and personal lived experience of the social security system. A few respondents had worked across multiple areas in Social Security Scotland and felt this allowed them to develop a detailed knowledge of the service and its benefits.

"I have been in Social Security Scotland for years and I have applied for some of the benefits myself." Staff respondent

"I feel that the [internal guidance] is an excellent source to use to increase knowledge." Staff respondent

Comments showed that some respondents also felt knowledgeable about support delivered by other bodies such as the Department for Work and Pensions and local authorities. Others felt they would benefit from more training and information on this, particularly in relation to benefits that can affect clients' eligibility for Social Security Scotland payments.

> "I know a wide range of possible areas clients can go to to receive extra help if required." Staff respondent

> "I feel very confident about my own benefit, Adult Disability Payment, but it would be helpful to refresh myself on the other benefits and support out there for our clients." Staff respondent

Some respondents felt knowledgeable about their specific area of work but knew less about other Social Security Scotland benefits or parts of the service. A few felt unfamiliar with benefits that would be launched and delivered by Social Security Scotland in the future. Some said refresher training or fact sheets would be helpful. Some said workload pressures made it challenging to develop their knowledge of the social security system and wanted more time for learning in this area.

> "I have good knowledge of the benefit I work on but do not know the ins and outs of the other benefits delivered by Social Security Scotland." Staff respondent

> "Anytime I am asked a question by a client I have to spend some time trying to find the answer. Training on this or at least a fact sheet would be helpful." Staff respondent

The survey also asked respondents who interact with clients, or will do so in future, about their knowledge of advice and advocacy services (Table 4.3).

Table 4.3: **How much do you agree or disagree with the following…**
(n=969) Current and future client-facing staff, Row percentages

How much do you agree or disagree with the following…	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree
I know about a range of advice and advocacy services that are convenient for clients	70%	17%	14%
I know how to refer clients to advice and advocacy services	60%	19%	21%

Seven in ten (70%) respondents agreed that they knew about support services and six in ten (60%) said they knew how to refer clients to these (compared to 69% and 60% respectively in 2022-23). Over one in ten (14%) disagreed that they knew about support services and one in five (21%) disagreed that they knew how to refer clients to these (compared to 13% and 22% respectively in 2022-23).

Finally, the staff survey asked respondents who interact with clients, or will do so in future, about their knowledge of the re-determinations and appeals processes (Table 4.4).

Table 4.4: **How much do you agree or disagree with the following…**
(n=969) Current and future client-facing staff, Row percentages

How much do you agree or disagree with the following…	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree
I know enough about the re-determinations process to explain it clearly to clients	70%	14%	16%
I know enough about the appeals process to explain it clearly to clients	51%	22%	27%

Seven in ten (70%) agreed or strongly agreed that they were knowledgeable about the re-determinations process (compared to 53% in 2022-23). Around half (51%) felt knowledgeable about the appeals process (compared to 40% in 2022-23). Around a quarter (27%) disagreed or strongly disagreed that they knew enough about the appeals process. Fewer (16%) disagreed or strongly disagreed that they knew enough about the re-determinations process.

In their comments, respondents gave examples of what had helped them to feel knowledgeable about support services, re-determinations, and appeals including:

- training and guidance,
- self-directed learning,
- support from colleagues,
- and experience gained from current or previous roles.

Some said this knowledge was essential to their role and felt strongly about being able to share this information clearly and effectively with clients. Some said they felt less knowledgeable about processes they didn't work on regularly but knew how to find guidance or ask for peer support. A few said these topics were not relevant to their role. Those who felt less knowledgeable said more training and practical experience would be helpful. There were mixed comments about internal guidance on these topics with some saying it was helpful and others feeling it could be improved.

"I feel my knowledge is good based on my training, experience and ongoing training. I have no practical experience of appeals and so that is why I feel less confident in that area, although I have read all the guidance." Staff respondent

"I think that the advocacy services are very good and straightforward to explain. As we have been talking to clients about the re-determination process for some time now this is second nature, although having more input from Client Experience [colleagues] would allow client advisers to know how the process should work for clients. The appeals process is still fairly new but the recent guidance has made this easier to explain to clients. I know that a presentation on appeals has been given to [case managers] - this would be very beneficial for [client advisers] - especially as we are answering clients' questions on telephony." Staff respondent

"[…] could always be improved to give us the best knowledge to deliver this to our clients. Often guidance is not up to date for client support advisers."
Staff respondent

4.2. Experiences of training and guidance

In written comments, staff respondents described their experiences of undertaking training and using guidance within their role. Respondents said training and guidance covered a range of topics including:

- equality, human rights, and discrimination,
- inclusive communication,
- internal systems and processes,
- call handling and telephony,
- safeguarding and risk of harm,
- aspects of Social Security Scotland's service including benefits, organisational values, and Our Charter.

Respondents said training had taken a range of formats including internal and external training courses, online learning packs, on-the-job training, self-led learning, knowledge sharing with peers, and information sessions and webinars. Positive comments said formal training contained useful content and was widely available. On guidance, positive comments said internal guidance was easy to find and helpful for respondents'

needs. Some respondents noted that guidance had improved over time. Respondents commonly said training and guidance had helped them to feel knowledgeable, informed and skilled. Many said they felt well-equipped to do their job as a result.

> "I have completed a number of training courses, including external modules, so do feel very confident in making decisions based on knowledge/skills I have, coupled with advice from [my] line manager and feedback from colleagues."
> Staff respondent

> "The training has been top notch. There has always been encouragement to undertake upskilling, shadowing and anything else I need." Staff respondent

> "I feel the guidance has been updated to help us deliver a better service."
> Staff respondent

Negative and mixed comments described problems with training and guidance. Common issues with training included: a lack of training for core aspects of their role, training formats that didn't accommodate staff needs or learning styles, and good initial training but insufficient follow-up support for consolidation. Some said additional or refresher training on things like internal processes, mental health awareness, and interacting with vulnerable clients would be helpful. Some felt they would benefit from more opportunities for one-to-one training including coaching, job shadowing and role playing. There were calls for all learning styles to be accommodated through a wider range of learning formats and for training to be accessible and inclusive for all staff.

> "I feel confident now with experience and my knowledge and self learning. However I do think […] some coaching, classroom training or [support] when something launches or changes is lacking." Staff respondent

"I have undergone induction training and then 'on the job' training. The initial training was excellent but I am not convinced by how well it prepared me for my role. The on the job training was poor and I did not feel well supported at all. I felt that we were all left to just got on with things and ask what we needed. However, when you are at the stage of not knowing what you don't know, that is very tricky […]."
Staff respondent

"[…] I loathe e-learning and I learn by watching and doing. All ranges of learning should be accommodated in training but...they aren't. No fairness, dignity or respect there for people with alternative learning styles." Staff respondent

In negative and mixed comments about guidance, respondents said guidance was difficult to navigate, gave unclear or conflicting information, and didn't always meet their needs. Some said there were gaps in guidance and mentioned a lack of guidance for specific roles. Respondents commonly said it was difficult to keep up with frequent changes to guidance and that changes were not always communicated clearly. Some were concerned that this had led to guidance not being followed consistently across the organisation. They felt changes should be communicated in a more clear and efficient way to give staff the most up to date information to do their jobs.

"I feel confident doing my job although guidance isn't always easy to navigate and often doesn't cover the scenarios we encounter." Staff respondent

"Sometimes the guidance is not clear or is missing or incomplete regarding certain tasks. I always understand what we are trying to achieve but we do not always have the correct tools for the job." Staff respondent

"Regular changes to guidance without communication can be difficult. If we are not informed of changes how can we apply them?" Staff respondent

4.3. Support for staff

This section looks at the support staff respondents received at work. The staff survey asked all respondents to rate the support they'd had from their line manager during 2023-24 (Table 4.5). If respondents had multiple line managers over the course of the year, they were asked to focus on their most recent one.

Table 4.5: **Thinking about the past year, how would you rate the support you've had from your line manager?**
(n=1,484) All respondents, Column percentages

Response options	
Very good	56%
Good	23%
Sometimes good, sometimes poor	15%
Poor	3%
Very poor	2%

Most (79%) respondents rated support from their line manager as good or very good (compared to 82% in 2022-23). Over one in ten (15%) said support had been mixed. A small proportion (6%) said they'd had poor or very poor support from their line manager.

In written comments, staff respondents commonly described line managers as approachable, dependable, knowledgeable, and engaged. They said clear communication, regular one-to-ones, effective leadership, and useful advice for their day-to-day work had helped them to feel supported by line managers. There were positive comments about feeling listened to and supported with both work matters and personal circumstances. Some respondents felt a strong sense of trust towards their line manager and felt trusted in return to do their job with autonomy. Others praised line managers for providing constructive feedback and encouraging professional development. Some said line managers had welcomed ideas and input into team decision making which made respondents feel valued, enabled, and empowered within their role. Other positive comments indicated that line managers had been good at communicating team- or organisation-wide messages.

"Always available and approachable. [Focuses] on my wellbeing and how to best support my work-life balance to ensure I am able to be my best self at work. Positive and proactive." Staff respondent

"I receive great support from my line manager, making sure I have the right workload, am working on things that I enjoy, while at the same time being challenged and given the right development opportunities." Staff respondent

"My line manager always ensures that I am included in any decisions which will impact me. They also are always there to discuss any issues and support me in any difficult conversations or meetings." Staff respondent

"My manager is open with communicating changes to us in a timely manner and will have [a] daily call with us to give us updates." Staff respondent

Some respondents felt less supported by line managers. Comments mentioned a lack of communication, infrequent one-to-ones, and unclear or unrealistic work expectations. Some said line managers wanted to help but were often unavailable due to high workloads. In some cases, line managers did not provide effective leadership or guidance for work-related issues. Respondents felt that line managers did not have the knowledge, training, or experience to help with specific work-related queries. Some also said line managers did not share organisation-wide messages consistently. A few had instead gone to peers for guidance, support, and information. Some comments described experiences of unfair treatment or discrimination from line managers.

"My line manager doesn't support me or my team as a whole. She is in constant meetings and not available to ask for support most of the time. I and my team support each [other] when we can or approach other team managers a lot." Staff respondent

"Cascaded communication is almost nil, we often rely on other teams to fill us in. Manager offers little in respect of career support or job support." Staff respondent

"I have had 2 different line managers. Each one with very different expectations and ways of working. […] I feel wherever you work you should have the same expectations and 'rules' e.g. some managers allow admin time some do not, also not letting you work flexibly or accrue reasonable amounts of flexi and others allowing this. Each line manager should be following policy on this from Saltire and no exceptions or their own interpretation of this. They need support from higher up to manage more effectively." Staff respondent

"My line manager is not very understanding of my disability and the challenges I face." Staff respondent

When asked if they had any additional needs or accessibility requirements at work, a third (33%) of respondents said yes. The survey asked these respondents whether they told anyone about their needs or requirements (Table 4.6) and, if so, whether they got what they needed (Table 4.7).

Table 4.6:   Did you tell anyone about your needs or requirements?
(n=488) Respondents who had additional needs or accessibility requirements at work, Column percentages

Response options	
Yes	98%
No	2%

Table 4.7:   Did you get what you needed?
(n=476) Respondents who told someone about their needs or requirements, Column percentages

Response options	
Yes	58%
Partially	28%
Not yet	8%
No	6%

Of the respondents who had additional needs or accessibility requirements, almost all (98%) told someone about their needs. Around three in five (58%) said they got what they needed. Just over a quarter (28%) said their needs were partially met. A smaller proportion said their needs had not been met yet (8%) or not met at all (6%). Full figures for this question were not reported in 2022-23. Year-on-year trend analysis is therefore not available for these findings. It will be included in future reports where possible.

In their comments, staff respondents commonly mentioned positive experiences where their needs and requirements were met. Line managers were often understanding, accommodating, and helped respondents to get what they needed. Comments also highlighted positive experiences with health and safety colleagues in Social Security Scotland. Examples of support included: changes to work roles and tasks, provision of required equipment, and flexibility around working location and pattern including phased returns after time off or special leave. Some respondents said they received support

promptly and efficiently. Some appreciated the flexibility to try different adjustments until they found what suited them.

> "I had to take time off for illness and this was met with complete understanding and also further investigatory help for work place adjustments due to my disability […]."
> Staff respondent

> "I needed a standing desk and my line manager was very supportive and the Health and Wellbeing Team very responsive. I am getting the standing desk [to work from home] and my manager always checks to see if I have booked a standing desk at the office." Staff respondent

A few respondents had used an employee passport. The employee passport is a voluntary tool designed for all staff who might need adjustments and supportive measures at work. There were mostly positive experiences of using the employee passport to discuss needs and receive support. Some respondents had mixed experiences. Issues included feeling that line managers hadn't reviewed or understood the content, and support or adjustments being delayed or not implemented.

> "I was fully supported with both physical equipment and adapted work pattern and Employee Passport, including an assessment from Occupational Health."
> Staff respondent

> "I have had an employee passport allowing me not [to take] incoming calls due to personal circumstances […]. I told all my managers when I moved sections but none of them reviewed it." Staff respondent

There were mixed comments about hybrid working and respondents' needs. Positive comments said hybrid working was convenient and talked about getting support for accessibility issues and necessary equipment in office locations. Others said hybrid working was challenging and they experienced problems around having their needs met in an office. Some had received adjustments around working location due to short- and

long-term personal circumstances, such as caring responsibilities or health conditions, and were satisfied with this support. Others said personal circumstances made it difficult to attend an office in a fixed way but felt this wasn't recognised by line managers or within organisational policy and processes.

> "I have caring responsibilities, health conditions, and I am also going through menopause which worsens these conditions. My [manager] is flexible in allowing me to work from home when required." Staff respondent

> "I required a reasonable adjustment for fixed days in office […] and agreed this [with] no issues with my line manager." Staff respondent

> "Require specialised chair, which is set just for me, however is frequently used as a pool chair including used by health and safety to see if it is a good fit. Chair is adjusted despite notice not to. Very frustrating and can and has caused a painful shift in office on more than one occasion." Staff respondent

> "Still waiting on accommodations. Deeply unhappy about how the working from home policy has been implemented. I have several disabilities and took this job because I was assured that I'd be working from home. I am thankful that I am able to discuss how my disabilities impact me, but other colleagues are not in this position. It feels as though I need to go into a huge amount of personal detail to justify why I want to work from home. It should be enough for adult professionals to request to continue working from home without the need to justify this."
> Staff respondent

Some respondents said their additional needs or accessibility requirements hadn't been met or that they had experienced delays and long waits. Comments described poor experiences where respondents' needs and requirements were not listened to, supported, or understood. Other issues included: ongoing needs being met only on a temporary basis, not being consulted on decisions about their adjustments, and withdrawal of support or adjustments without notice. A few respondents mentioned examples of discrimination, unfair treatment and inconsistent decision making when

asking to have their needs or requirements met. Comments highlighted a negative impact on morale and wellbeing as a result. Those who hadn't told anyone about their needs or requirements said they felt unable to raise the issue or felt the challenges they'd faced were to be expected as part of their job.

> "I got what I needed for a period of time, but this then ended without discussion. I was advised that it was never a permanent solution and I still have not been able to discuss extending this." Staff respondent

> "I had a challenging experience with a former supervisor who discounted the adjustments I had requested and insisted on expectations that were beyond my scope to accommodate." Staff respondent

4.4. Communication

This section looks at staff respondents' experiences of communication within their role. Staff survey respondents were asked how confident they felt to deliver a service based on inclusive communication (Table 4.8). By 'delivering a service', we mean the services staff deliver to colleagues, clients and partners and the way they do their jobs across all areas of the organisation.

Table 4.8: **In the past year, how confident have you felt to deliver a service based on inclusive communication?**
(n=1,481) All respondents, Column percentages

Response options	
Very confident	24%
Confident	56%
Not confident	16%
Not at all confident	5%

Most (79%) respondents said they felt confident or very confident to deliver a service based on inclusive communication (compared to 82% in 2022-23). Around a fifth (21%) didn't feel confident.

Staff respondents left comments about what had helped them to feel confident to deliver a service based on inclusive communication. Examples included: support from colleagues, feeling a personal commitment to promoting inclusiveness, taking part in training courses, and gaining experience in their role over time. Some saw inclusive communication as an essential part of their role and felt strongly about delivering a service in line with this. Internal guidance and tools had helped some to feel well-equipped and informed.

"I have completed all the relevant training on inclusive communications and complete multiple appointments each week which help me to improve my communication skills." Staff respondent

"As I have issues myself, I work hard to be as inclusive as I possibly can be to clients and colleagues." Staff respondent

Negative and mixed comments talked about challenges and barriers to delivering a service based on inclusive communication. Examples included:

● a lack of understanding or awareness of inclusive communication across some parts of the organisation,

● difficulties communicating with colleagues in different areas of Social Security Scotland or the Scottish Government,

● and the organisation and service not being fully accessible for all Social Security Scotland clients and staff.

There was a perception among some comments that inclusive communication was becoming harder to prioritise across the organisation as demands on the service increased. Similarly to experiences of delivering a service in line with the Charter (section 1.2), some respondents felt inclusive communication was not always prioritised for staff in the same way as for clients and that it could be better embedded internally. Some respondents felt they needed more training and information on inclusive communication. There were suggestions to facilitate more open and inclusive communication across different teams through, for example, clear and detailed organisational charts.

"I feel I would benefit from more understanding of the needs of others to ensure truly inclusive communication. Wherever possible I look to expand my understanding through learning events and discussion." Staff respondent

"Not enough people know what is meant by inclusive communication. Interest in the subject is 'at the edges' with no real desire to progress and embed properly across the organisation. Resource for this work has been reduced which has had an impact on the ability to deliver what is needed […]." Staff respondent

"There are still gaps in the guidance regarding how we communicate. Which makes communication with clients, colleagues and partner organisations inconsistent, sometimes putting staff and clients at risk." Staff respondent

Staff respondents were asked how easy or difficult it had been to communicate with colleagues in a way that felt inclusive of their own needs (Table 4.9). By this, we mean how staff communicate internally at work with colleagues rather than externally with clients and partner organisations.

Table 4.9: **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=1,487) All respondents, Column percentages

Response options	
Very easy	37%
Easy	36%
Neither easy nor difficult	17%
Difficult	7%
Very difficult	2%

Around three-quarters (74%) of respondents found it easy or very easy to communicate with colleagues in a way that felt inclusive of their own needs (compared to 80% in 2022-23). One in ten (10%) said it was difficult or very difficult and 17% said 'neither'.

In positive written comments, respondents talked about an inclusive culture at work and felt supported by other colleagues to communicate in their preferred ways. They said internal communication channels, such as Microsoft Teams and daily bulletins, had been helpful and appreciated having a range of ways to share and receive information. Some respondents preferred in-person communication and welcomed the opportunity to work in an office location as part of hybrid working.

"[Microsoft] Teams allows everyone to continue communication in a way which is now considered normal and is inclusive to everyone due to hybrid working, health conditions, caring responsibilities etc." Staff respondent

In negative and mixed comments, respondents described instances where communication wasn't inclusive of their needs including:

- the use of acronyms in both written and verbal communication,
- not receiving communication in their preferred format (such as written communication instead of verbal),
- communication preferences not being met during online meetings,
- and information and internal systems being incompatible with assistive settings and technology.

These issues had led some respondents to feel excluded and that inclusive communication wasn't always embedded or prioritised across the organisation.

"I still see a lot of acronyms used across the organisation that cause confusion. People speak in acronyms which is becoming a culture. I myself try to avoid the use of acronyms and try to make my communications as clear and inclusive as possible." Staff respondent

"[…] team meetings are a total free-for-all where the communication styles of verbal communicators and those who are more 'social' are always given priority. If a team meeting has an agenda (list of things that will be covered) this is never shared before or during the meeting so it makes the content of the meeting very difficult for me to follow […]." Staff respondent

Staff respondents who said they interact with Social Security Scotland clients as part of their job, or will do so in future, were asked how confident they felt to interact effectively with clients who understand information and express themselves in different ways (Table 4.10).

Table 4.10: **In the past year, how confident have you felt to interact effectively with clients who understand information and express themselves in different ways?**
(n=962) Current and future client-facing staff, Column percentages

Response options	
Very confident	35%
Confident	54%
Not confident	9%
Not at all confident	1%

The majority (89%) of respondents felt confident or very confident to interact effectively with clients who understand information and express themselves in different ways (compared to 87% in 2022-23). One in ten (11%) didn't feel confident to do this.

In written comments, respondents felt a strong commitment to communicating with clients in an inclusive way. Many said this was an essential part their role. Some respondents described what had made them feel confident. Examples included: training and experience in current and previous roles, having access to tools like language translation and interpretation, and skills in listening to and identifying clients' needs.

"Being able to use tools like [language service], translation, and interpreters to communicate with clients." Staff respondent

"As a frontline worker, I have extensive experience in doing this. Mostly from other roles however I have also received training from Social Security Scotland to do this effectively." Staff respondent

Those who didn't feel confident said this was due to issues like: a lack of experience or training using communication tools, problems with internal processes and guidance, and not having the tools to meet the communication needs of all clients (such as email). Some respondents felt confident about meeting some types of communication needs but felt unprepared to deal with others. Some said this had a negative impact on their

ability to deliver a service in line with the organisation's values. There were calls for more training on things like telephony, translation, and British Sign Language and deaf awareness. Respondents also felt guidance could be improved in some areas, particularly on how to provide certain communication formats for clients.

"No one in my team is completely sure how to request 'easy read' format through [language service] and my manager was unable to provide guidance. This leads to many alternative format requests being ignored." Staff respondent

"Lack of training and lack of flexibility to communicate with clients in different formats." Staff respondent

"Guidance is poor regarding clients with hearing issues and language barriers." Staff respondent

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

This section looks at partner and staff respondents' experiences of giving feedback and their views on how open Social Security Scotland is to receiving feedback and making improvements. It aligns with the third section of the Charter Measurement Framework and Our Charter.

5.1. Partner experiences of giving feedback

The survey of partner organisations asked respondents if they thought Social Security Scotland is open to and acts on feedback (Table 5.1).

Table 5.1: **Partner respondent views on feedback**
(n=222) All respondents, Row percentages

How much do you agree or disagree with the following…:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know / Not applicable
Social Security Scotland is open to feedback	50%	22%	11%	17%
Social Security Scotland acts on feedback	25%	31%	22%	23%

Half (50%) of partner respondents said they agreed or strongly agreed that Social Security Scotland is open to feedback (compared to 58% in 2022-23). A quarter of respondents (25%) agreed or strongly agreed that Social Security Scotland acts on feedback (compared to 20% in 2022-23).

Positive comments said that Social Security Scotland welcomed feedback and was open in its approach to encouraging stakeholder input into the service. Stakeholder engagement activities - like Social Security Scotland-run meetings and events - made some respondents feel that the organisation was open to feedback. There was a perception among comments that Social Security Scotland had acknowledged the challenges and limitations of the service but were keen to use feedback and learning to make improvements.

A few respondents felt that detailed queries and feedback about benefit delivery had not been welcomed and that Social Security Scotland hadn't encouraged open dialogue with partners on this. Some felt that partner organisations could offer unique client-focused advice to improve the service and wanted Social Security Scotland to work more closely and consistently with partners to gather this insight.

> "The times I have met with people from [Social Security Scotland] I have found them to genuinely want to make these systems work as best as possible and have always been eager to hear feedback from outside organisations." Partner respondent

> "When attending events [the] limitations of the service are recognised and solutions discussed. Any gaps are explored and there is always a willingness to look at any issues that there are." Partner respondent

> "Detailed queries about very pragmatic, operational matters regarding benefit administration do not feel welcomed and the responses from Social Security Scotland officers seem intended to close down enquiries rather than offer an open dialogue. This is quite a disappointing aspect of development as customer representatives have much to offer in terms of how improvements could be made to processes." Partner respondent

There were mixed comments about whether Social Security Scotland acts on feedback. Some respondents noticed changes as a result of partner feedback and were pleased with this. Specific improvements made by Social Security Scotland based on feedback are covered in section 5.3. Others felt Social Security Scotland had not acted on suggestions despite its culture of welcoming feedback. Some felt that feedback was taken on board but that issues were slow to be dealt with. A number of respondents were unsure or unaware if changes had been implemented based on their feedback. One respondent noted that their feedback led to changes in practice but received a conflicting communication from Social Security Scotland saying that their feedback had not been actioned.

"Overall, it has been good but Social Security Scotland are not as good at dealing with the issues/problems we experience. They try to focus on the positives and their rationale on why they have set things up as they have rather than dealing with the problems. Sometimes we feel a bit fobbed off." Partner respondent

"Whenever we have requested more information and better improvements or had specific queries, the response is "we will feedback". There has not been a response to this or [an] outcome. Nothing changes or improves. Overall Social Security Scotland, as you will be made aware from my answers, have been a disappointment and I expected and hope for better but this has not materialised." Partner respondent

Partner respondents were asked about their experience of providing, or wanting to provide, feedback to Social Security Scotland (Table 5.2).

Table 5.2: **In the last year, have you given Social Security Scotland any feedback about how they could improve?**
(n=219) All respondents, Column percentages

Response options	
Yes, I have given feedback	51%
No, I haven't wanted to give feedback	30%
I wanted to give feedback but don't know how	20%

Over half (51%) said they had given feedback (compared to 55% in 2022-23). A fifth (20%) said they wanted to give feedback but didn't know how to do this (compared to 24% in 2022-23).

In written comments, those who had given feedback had commonly provided this either online or directly to client advisers, Local Delivery staff, or staff at meetings or events (both those held by Social Security Scotland and those where Social Security Scotland staff were attendees). Respondents commonly praised the way staff welcomed and

handled feedback, saying they were thoughtful, positive, and professional. There was a feeling amongst comments that staff were engaged and responsive when given feedback, particularly at stakeholder engagement events or meetings. There were positive comments about feeling listened to by staff and that they took feedback on board.

> "It was reassuring that I was listened to and responded to in a thoughtful and positive way." Partner respondent

> "I have found Social Security Scotland's engagement events informative and the staff presenting them helpful and open to suggestions for possible improvements in service delivery." Partner respondent

Other comments described negative or mixed experiences of providing feedback. Some respondents felt their feedback wasn't listened to, including examples where respondents said staff hadn't acknowledged or welcomed their feedback. Others said that whilst staff were receptive, it wasn't made clear whether their feedback would be actioned or would make a difference.

> "[…] when raising any concerns during events with Social Security Scotland there is very little acknowledgment of any issues […]" Partner respondent

> "We have extensive widespread benefit experience but find that Social Security Scotland staff can be very defensive of any criticism." Partner respondent

> "I had a few online meetings with a [staff] member […] but not sure this is making any difference that I am aware of." Partner respondent

Other issues included: delays hearing back, not hearing back at all, or wanting to give feedback but not knowing how to do so. Some respondents wanted follow up contact from Social Security Scotland, either explaining what had been done with their feedback

or asking them for further insights but didn't receive it. A few said they received a response to their feedback in some instances but not in others and felt this could be more consistent. Others recognised that it would take time to implement large-scale improvements and thought this was perhaps why they hadn't heard back from Social Security Scotland or seen their feedback actioned yet.

"I have fed back and received contact but would have liked a response to know if my feedback would be actioned." Partner respondent

"I advised it would be beneficial to have an adviser helpline and also to have a direct referral pathway to the Local Delivery team - I have not had feedback on these, but these are large suggestions." Partner respondent

"I fed back about the online Change of Circumstances form failing to submit and wiping all the responses. I have [fed back] at least three times and never once have I even had an acknowledgement so I simply do not use the online services any more." Partner respondent

"I wanted to give feedback regarding my clients being advised to return their Adult Disability Payment forms via recorded delivery, but was not sure what the best way to send this feedback was." Partner respondent

5.2. Staff experiences of giving feedback

Staff respondents were asked if they would speak up if there was a problem in Social Security Scotland (Table 5.3).

Table 5.3: **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=1,488) All respondents, Column percentages

Response options	
Strongly agree	41%
Agree	39%
Neither agree nor disagree	10%
Disagree	5%
Strongly disagree	5%

Most (80%) staff respondents agreed or strongly agreed that they would speak up if they saw something wasn't working or thought something was wrong in Social Security Scotland (compared to 86% in 2022-23). One in ten (10%) disagreed or strongly disagreed that they would speak up (compared to 6% in 2022-23). The same proportion (10%) neither agreed nor disagreed.

In written comments, staff respondents described experiences of giving feedback. Respondents had provided feedback in a number of ways including: to line managers, to other senior members of staff, and through surveys and trial projects. Feedback commonly covered topics like: changes to ways of working, better communication within and between teams, and improvements to processes, systems, policies, and guidance. Many respondents felt a strong responsibility to report issues and provide feedback in order to make improvements. Some described positive experiences of giving feedback and felt confident to share their concerns. They reported an internal culture that encouraged feedback and felt suggestions were listened to. Examples where staff respondents' feedback led to improvements are covered in section 5.3.

"[Social Security Scotland] encourages an inclusive workplace and the culture means I feel confident giving my opinion without worrying that my suggestions wouldn't be taken seriously or appreciated." Staff respondent

"If something is not right, I will always report this back to my manager. I want to ensure Social Security Scotland is a service that is as streamlined and supportive as possible for the people of Scotland. Applying for a benefit is often a stressful experience for clients. If I can provide feedback that may positively assist the client journey, I will always do so. I also provide feedback on processes and systems that we use on a day to day basis as staff of Social Security Scotland. If I feel something is not working, or if something was wrong, I would not be frightened to raise these issues. I strongly believe that if our systems and processes were to work better, then our staff will be happier, will be able to do their jobs more effectively, which in turn then has a positive impact on our clients." Staff respondent

Although respondents felt strongly about the need to raise concerns, many felt feedback didn't lead to change. Others said changes took a long time to implement, or only took place after something went wrong. Some respondents described negative experiences of providing feedback including poor treatment by line managers, not being listened to, and not trusting that their feedback would be passed on. Negative experiences led respondents to feel that their feedback didn't make a difference and that their views were not valued. Some were reluctant to provide feedback in case of negative consequences within their working relationships or role. There were calls to further embed a culture of welcoming and acting on feedback across the organisation and for better communication about how improvements and change are managed.

"I have spoken up when things weren't working however nothing ever changes […]." Staff respondent

"I don't always feel confident or able to speak up when in the presence of higher grade colleagues as I have been shut down in the past." Staff respondent

"I have spoken up and seen others speak up and have been penalised or dismissed. I feel like Social Security Scotland does not want the opinions or views of its employees. They simply ask because they have to. Nothing will be changed or adapted for employees unless it has already been decided by upper management."
Staff respondent

"Whilst my manager encourages this type of feedback, there is no acknowledgement or feedback from senior management […] even if suggestions are not considered." Staff respondent

5.3. Improvements based on feedback

The third section of the Charter Measurement Framework asks for "Examples of You said: We did". This means examples where Social Security Scotland made improvements based on feedback.

In the survey of partners, a couple of respondents noted that Social Security Scotland had made changes based on feedback, such as measures to address delays in processing applications and to reduce call waiting times.

"[…] Social Security Scotland have been open about difficulties they have faced in processing claims to [Adult Disability Payment] and other benefits within target times and [have] taken measures to address delays." Partner respondent

"There are things that are good – e.g. where there have been changes as the result of feedback, where the phone line waiting times have come down […]."
Partner respondent

In the survey of staff, some respondents described examples of when their feedback had been taken on board and led to improvements. A few staff respondents also described examples where they had passed on feedback from partners which was listened to and led to changes. Examples were commonly about improvements made to Social Security Scotland's service, such as better processes for communicating with

clients and guidance for supporting vulnerable clients. There were also improvements to how applications are managed and processed, and changes to policies on identification.

> "To accept an adoption certificate as identification in a similar manner to a birth certificate. I raised this issue and some months later it was introduced."
> Staff respondent

> "I'm aware of a senior practitioner who suggested a different way for the adult health practitioners to manage cases. This led to a trial of a different way of working. The trial was so successful, that this new way of working will be rolled out to the entire Adult Disability Payment health practitioner staff in mid-April." Staff respondent

Staff respondents said feedback had also led to improvements to internal policies and processes for staff. This included improvements or changes to things like:

- internal guidance,
- staffing and resource,
- communication and collaboration across different teams,
- and internal systems and how these are used.

There were also improvements to the way management information is collected, ways of working in specific teams, and staff processes for Local Delivery appointments.

> "Case Transfer is an ever changing department that encounters new issues very regularly so we require more streamlined and efficient communication for us to continue working cases correctly - this has started to get worked on […] and we had a big email about the communication overhaul […]." Staff respondent

> "We have made multiple changes to our processes and ways of working as a team based on good ideas from colleagues." Staff respondent

"New ways of recording information on [internal system] for involvement of practitioners. This was suggested and was taken forward." Staff respondent

"Ability to track the number of automatic applications being processed - this has now been implemented." Staff respondent

6. A Learning System: Experiences of mistakes and complaints

This chapter presents feedback from partner survey respondents who said something had gone wrong during their experience with Social Security Scotland, and staff perspectives on mistakes and complaints. It aligns with the third section of the Charter Measurement Framework and Our Charter.

6.1. Partner experiences of things going wrong

Some partner respondents described instances when things went wrong during their experience with Social Security Scotland. Examples of problems and mistakes included: clients receiving incorrect documents from Social Security Scotland; issues around the cost of posting paper applications; and paper applications being lost or online applications not being received. Some respondents said clients had incorrectly received letters to say their application had been lost or not returned when this wasn't the case, leading clients to feel stressed and anxious. One respondent experienced initial difficulty reporting a mistake to staff about an incorrect form, but the issue was eventually resolved.

"[…] Automatic letters being sent out regularly advising people their applications have been lost, or not returned, when they are indeed with Social Security Scotland. Causes a lot of anxiety and panic for our clients and is not uncommon unfortunately." Partner respondent

"We understand that information needs to be given but an application that is 100 pages long puts people off. I once sent an application back for a client that we did "signed for" as they "go missing" and I needed to pay for a small parcel because of the weight of it. That's wrong." Partner respondent

"[…] your webchat adviser would not believe me when I told him you had sent a client another re-determination form rather than an appeal form. All I wanted him to do was send an appeal self addressed envelope. He refused to do so but did eventually send an appeal form and envelope to the client directly."
Partner respondent

Other examples included: staff giving incorrect information, clients and partners not receiving call backs when promised, and problems with interpretation. Another experienced problems using their own interpreter when communicating with Social Security Scotland staff. Some respondents mentioned mistakes and issues during the application process including a miscommunication over whether a client was due to receive Local Delivery support with their application. Some respondents said staff had been apologetic when things went wrong but one described a poor experience with staff during an in-person appointment.

"[…] frontline staff have always been very helpful and open and apologetic when things have gone wrong […]." Partner respondent

"I've had two instances where translators have incorrectly translated on behalf of my client at security questions. On both occasions we noted this but the adviser stated they had to take the translator's answer. We had our own translator in the room who verified the correct info was given [by the client] it was just relayed incorrectly each time." Partner respondent

"[…] Person was not on time and client has autism, time keeping is a huge trigger. Meeting in a room with very bright florescent lighting and where there was a noise of an underlying hum, again client has huge sensory issues. When they mentioned the lighting the person stated 'I know it's not good'. Why would they allow this environment for clients? […]" Partner respondent

Some respondents mentioned mistakes and problems to do with Social Security Scotland's policies, processes, and systems. Such as requests for help with the mygov.scot portal not being followed up; problems completing a review for disability

benefits or reporting a change of circumstances; and issues with the policies and processes for making decisions. Some respondents described problems with identification checks, particularly for vulnerable clients, and this leading to applications being denied.

> "[…] Having a time limit on reporting a change of circumstance online is not good for clients who have a lot to report but have very little time to do so before losing what they have done, and having to start again is very upsetting." Partner respondent

> "[…] I have a review form that I completed online for a client which disappeared when I pressed the submit button. It took four phone calls [and] three webchats, all with about an hour each to get through to someone, to find out it had not been received. So now I have to put the client through the trauma of a third form. It has taken two days' work to lodge a form that should take an hour […]."
> Partner respondent

> "For vulnerable clients, trying to support to verify ID can be difficult when they struggle to engage with ourselves. Recently one of my vulnerable clients had their Adult Disability Payment claim closed as they failed to engage by the deadline. Even when social work and our team spoke to Social Security Scotland, there was no discretion and no consideration." Partner respondent

Some partner respondents said they'd complained to Social Security Scotland about mistakes and problems. Respondents also raised complaints in cases where applications encountered problems or needed to be processed urgently. This was due to the lack of other ways to escalate issues. A few had helped clients to raise complaints. Some said Social Security Scotland responded to the complaint and acknowledged or resolved the issue. Others said Social Security Scotland had been inconsistent at responding to complaints and described instances where they received a response to some complaints but not others, or no response at all. A few comments described poor experiences with staff when trying to submit a complaint or dissatisfaction with the final outcome of complaints.

"I had complained regarding an issue with a client on my caseload. I received a call with an explanation and the issue was resolved." Partner respondent

"I helped a client raise a complaint about the time delays in processing an Adult Disability Payment application and they contacted the client directly."
Partner respondent

"I raised a number of complaints for clients. Some I have had feedback, some not, it's inconsistent." Partner respondent

"Complaint submitted following failure to follow proper procedure regarding refusal decisions based on failed ID checks, failure to contact rep etc. No compensation offered and only a meagre apology. Social Security Scotland did say they would update their systems." Partner respondent

6.2. Staff perspectives on mistakes and complaints

Client Experience staff who participated in focus groups were asked about the common reasons for complaints in 2023-24 and how the complaints process had been working for clients and staff.

Client Experience staff participants said complaints were commonly about the time taken to process applications and receive a decision. Other common complaints were about:

- a lack of updates during the application process,
- receiving conflicting information or no information about the status of an application or change of circumstances when contacting via phone or webchat,
- and not receiving promised call backs.

Participants said some clients had complained where they disagreed with a decision rather than requesting a re-determination.

> "Not being kept up to date with change of circumstances or applications. Clients are phoning to chase what's happening […]. Conflicting information that's given. Clients are told one thing on one call and told something different two weeks later. And not receiving call backs […]. Clients are promised several call backs but they've not got them so then they complain." Client Experience staff participant

> "Clients want an update on calls or webchat and are being told we can't give an update […] staff are saying no we're not checking your case, we're not giving updates and that's what the complaints are about. There's just no communication." Client Experience staff participant

Participants described some examples of mistakes that led to complaints from clients. Mistakes were commonly to do with missing letters or errors in communication. Other examples were to do with errors in clients' details on Social Security Scotland's system, often resulting from the transfer of information from the Department for Work and Pensions to Social Security Scotland.

"I had a case where we'd actually done a change of circumstances in a reasonable timeframe and we spent the next four months telling the person we hadn't done it and we hadn't sent them a letter. So there were multiple people that gave that information, not just one person that got it wrong. It was four, five, six calls the client had. That comes back to training because staff genuinely don't know what they're looking at on their case so can't give an update." Client Experience staff participant

"Clients who were reaching the age of 18 and moving from Child Disability Payment to Adult Disability Payment got a letter saying they were a transfer case and they would get paid Child Disability Payment until they were 19. Then they got a letter saying they had to apply for Adult Disability Payment before their 18th birthday or their payments would stop. Some of those clients didn't get that second letter so they thought they would get paid unitl they were 19. The first they knew was when they got a letter saying their Child Disability Payment had stopped and they would no longer get payments unless they applied again. There were a lot of complaints about that. We now have a [working group] to agree a way forward when there's a big ticket issue like this. [Social Security Scotland] made calls to those clients to tell them they had to apply and if they didn't manage to submit the application before their 18th birthday then we would treat those applications as a priority because it was our fault." Client Experience staff participant

"Bank details and addresses have changed because the transfer of information from the Department for Work and Pensions has overwritten what's on our system with out of date information. It's a known issue but advisers aren't checking details before payments are issued […]." Client Experience staff participant

Client Experience staff participants described how the complaints process had been working for clients in 2023-24. They said clients had sometimes tried to complain over the phone or webchat but that their initial complaint wasn't dealt with or logged by the client adviser they spoke to. This led clients to submit a further complaint in writing, usually via Social Security Scotland's website. Participants felt this was a poor aspect of the service and said clients were often frustrated about having to submit more than one complaint. They felt the service could be improved if client advisers had more training and practical experience to confidently handle client queries and complaints. They also

thought internal systems could be improved to make it easier for client advisers to find existing complaints records whilst talking to a client.

> "Clients are saying this is the fourth or fifth time they've complained. They've maybe complained to an adviser on the phone but the adviser hasn't realised it was a complaint and hasn't logged it, or just hasn't done anything about it. It's quite common where an adviser doesn't know what to do and it's easier for them to tell them to email with the complaint so they're being directed to our team."
> Client Experience staff participant

> "On webchat a client said they'd like to make a complaint about the application timescales but the adviser didn't offer to take the complaint or give any advice, they just put the website straight in instead." Client Experience staff participant

> "It's about not getting proper training to call handle. Client advisers are trained on a benefit but have no call handling experience. They're telling the client to email the complaint to us because they don't know what to do on the call. And someone else is hassling them to get back on the phone. Ideally you'd want the client adviser to say 'give me all your details, I will go and have a look at it and get back to you' […]. Managers should be able to say 'that person can't be on inbound calls because they need to deal with this issue' […]. We are not investing the training in advisers for them to handle all that work. They're the most important people in our business, those frontline people, they're the face of our business and they leave the impression of our business with clients. We need to invest in training for those frontline advisers." Client Experience staff participant

Participants talked about their experience of handling complaints in 2023-24. They felt a strong sense of empathy and a responsibility to do the right thing for clients. They said stage 1 complaints were mostly straightforward to resolve and appreciated being able to talk to clients during this process[8]. However, they mentioned difficulties when

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[8] Social Security Scotland's complaints process has two stages. At stage 1, Social Security Scotland will aim to provide a response within 5 working days or less and will try to resolve a complaint with an apology, an explanation, and/or any action they will take to solve the problem. Stage 2 deals with complaints that have not been fully resolved at stage 1 or where a fuller investigation is needed.

handling stage 2 complaints, particularly where the same problems were raised repeatedly by clients.

> "We just want to get things sorted for the client." Client Experience staff participant

> "Overall with stage 1 it's alright because you're getting the chance to speak to someone and possibly resolve the complaint. It's quite a good feeling. With stage 2 you're constantly seeing the same things which becomes frustrating because you know colleagues are taking feedback to other people and nothing is happening on the back of it. It can be really nice when you do get something sorted for someone who's had a really terrible time and you've changed their experience of Social Security Scotland. That is a really great part of doing complaints, and the team's really great, but sometimes it can be a bit frustrating."
> Client Experience staff participant

Other challenges when handling complaints included:

- poor communication and difficulty receiving information from teams involved in processing applications,
- difficulty finding information on internal systems,
- high workloads and resourcing issues,
- and uncertainty over whether colleagues working on applications would do what was promised in outcome letters (such as providing an update to the client within a certain timescale).

Participants felt that a simplified and standardised process for logging notes on internal systems would address some of these challenges, particularly in terms of finding information when processing complaints. They did highlight recent changes, such as better relationships and more collaborative working across teams, but felt there was still room for improvement in dealing with key challenges.

"Finding the person to take responsibility for it is like looking for a needle in a haystack. And then to trust that they'll do what they say they're going to do. It's my name going on the outcome letter that's saying we're going to do it, but im not 100% sure it will happen. So I'm sending follow up emails to check they're doing what they said they would even though I closed the complaint two weeks ago."
Client Experience staff participant

"A client advisor doesn't have time to do a full investigation so the notes need to be so much better and clearer. I think when people have a case they forget other staff can go into it. So they know what's happening, but they're not updating the notes to let everyone else know. Then nobody can tell the client what's happening and someone will try to appease them and give them conflicting information […]. There should be a universal process for notes and it would make it simpler and easier for client advisers on the phones." Client Experience staff participant

"We're building relationships with operations [colleagues] and hopefully starting to see some better working relationships and issues not going on and on. We feel we're being listened to." Client Experience staff participant

7. Next Steps

The research findings provide insight into the experiences of Social Security Scotland staff and partners during the year 2023-24. 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.

Social Security Scotland's Charter is required by law to be reviewed every five years. Research took place in 2023 with Social Security Scotland clients, staff and partners for the first review. The findings from the review were published in a research report earlier this year. The Charter Measurement Framework was also reviewed and updated in line with changes to the Charter. We will shortly begin designing next year's bespoke research for the 2024-25 Charter Measurement Framework and will incorporate the reviewed version of the framework into this research.

8. Annex A: Social Security Scotland's communication with partners

This annex presents findings about partner respondents' experience of using the Social Security Scotland website and the guidance and resources provided by Social Security Scotland for its partners. The survey also asked respondents for their views on the communication channels used by Social Security Scotland to share information with partners. Respondents who support clients were asked further questions about their experience of using the mygov.scot website to access information about Social Security Scotland's service and benefits. The findings will be fed back to National Engagement and Corporate Communications colleagues to support continuous improvement in Social Security Scotland.

8.1. Partner views on Social Security Scotland's website, guidance and resources, and communication channels

Partner survey respondents were asked about their experience of navigating Social Security Scotland's website and finding information (Table A1).

Table A1: **Partner respondent views on Social Security Scotland's website** (n=196-197) All respondents, Row percentages

How much do you agree or disagree with the following…:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know / Not applicable
It was easy to navigate the website	75%	15%	10%	1%
I was able to find the information I was looking for	80%	10%	11%	-
The information was easy to understand	87%	9%	4%	-

Most respondents agreed or strongly agreed that it was easy to navigate Social Security Scotland's website (75%) and that they were able to find the information they were looking for (80%). Around one in ten (between 10% and 11%) disagreed with this.

Almost nine in ten (87%) said the information on Social Security Scotland's website was easy to understand. This was the first year that the survey asked partner respondents for their views on the Social Security Scotland website. Year-on-year trend analysis is therefore not available for these findings. It will be included in future reports if these questions are asked in future surveys.

Partner respondents were asked further questions about their experience of finding and using guidance on Social Security Scotland's website (Table A2).

Table A2: **Partner respondent views on guidance**
(n=197) All respondents, Row percentages

How much do you agree or disagree with the following…:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	I didn't know the guidance existed	The guidance is not relevant to me
It was easy to find the guidance I needed on Social Security Scotland's website	57%	18%	7%	16%	2%
The guidance on Social Security Scotland's website helped to answer my questions	55%	20%	8%	15%	2%

Over half (57%) of respondents agreed or strongly agreed that it was easy to find the guidance they needed on Social Security Scotland's website (compared to 49% in 2022-23). A similar proportion (55%) agreed that the guidance helped to answer their questions (compared to 42% in 2022-23). Less than one in ten (between 7% and 8%) disagreed with these statements. A sizeable minority (between 15% and 16%) said they did not know the guidance existed, and a few (2%) said it was not relevant to them.

Social Security Scotland has a range of resources that partner organisations can share with clients. For example, this includes fact sheets, leaflets and posters. Respondents were asked how useful they found these resources (Table A3).

Table A3: **How useful partner respondents find the resources that are designed for clients**

(n=228) All respondents, Column percentages

Response options	
Very useful	20%
Somewhat useful	51%
Not useful	4%
Not at all useful	0%
I didn't know these resources existed	16%
These resources are not relevant to me	9%

The majority (71%) of respondents said the resources were 'very useful' or 'somewhat useful' (compared to 60% in 2022-23). Very few (4%) said the resources were 'not useful'. 9% said the resources are not relevant to them. 16% of respondents said they did not know the resources existed compared to 27% in 2022-23.

Social Security Scotland uses a range of communication channels to share information that is relevant to partner organisations. Partner respondents were asked how useful they have found each of the channels (Table A4).

Table A4: **How useful partner respondents find Social Security Scotland's communication channels**

(n=217-226) All respondents, Row percentages

How useful have you found the following communication channels…:	Very or somewhat useful	Not or not at all useful	I didn't know this channel existed	This is not relevant to me
Social Security Scotland's website	85%	4%	4%	7%
Social Security Scotland events (such as benefit roadshows and stakeholder workshops)	70%	8%	6%	16%
Events run by other organisations where Social Security Scotland has an information stand (such as conferences)	40%	9%	10%	42%
Face-to-face meetings	42%	3%	13%	43%
Social media	44%	11%	10%	35%
Stakeholder newsletter	65%	6%	12%	17%
Media coverage	52%	18%	6%	25%

Social Security Scotland's website was viewed as 'very' or 'somewhat useful' by the highest proportion (85%) of respondents (compared to 69% in 2022-23). Fewer respondents said they didn't know the website existed in 2023-24 (4%) compared with 2022-23 (15%). Less than half viewed the following channels as useful: 'social media' (44%), 'face-to-face meetings' (42%), and 'events run by other organisations where Social Security Scotland has an information stand' (40%). A notably higher proportion of respondents said these channels were not relevant to them compared to each of the other channels (between 35% and 43% compared to between 7% and 25% for other channels). Across all channels a sizeable minority said they did not know the channel existed (from 4% to 13%).

Respondents left written comments about Social Security Scotland's website and communication channels as well as the guidance and resources it provides for partners. They commonly said that Social Security Scotland's website was straightforward to navigate and that guidance and resources were easily sourced and helpful for their needs. Some had received guidance and resources from Social Security Scotland staff during meetings and events. They said resources were easy to understand and accessible to use with clients.

"I found it easy to navigate [the website] and find the information I was looking for." Partner respondent

"One of your client support team leaders had come out to deliver information leaflets to our service users. The resources appeared to be comprehensive and easy to follow." Partner respondent

"There are particularly useful materials in different languages which clients have appreciated." Partner respondent

"I use the leaflet every day with service users […] great guide to the benefits and has all [the] contact information." Partner respondent

Some respondents experienced challenges to do with Social Security Scotland's website, guidance and resources. Challenges included guidance or resources being difficult to find on the website and not always being accessible or easily understood by the clients they support. Some said the guidance and resources weren't useful or relevant for the clients they were working with. A few said they were unaware of the guidance and resources available. Comments showed that some respondents were unaware of the distinction between the Social Security Scotland and mygov.scot websites. Others were aware of the distinction but found it inconvenient to use two websites when supporting clients.

"It can be difficult to find information on the website. The search facility brings up many irrelevant pages. The guidance and resources section is overloaded with the same information in different languages making it cumbersome to find the information. It would be much easier if the information had subfiles with different languages to select to get the factsheet required." Partner respondent

"Guidance is quite good and I can usually find the information I am looking for. I wasn't aware there was any resources available." Partner respondent

"Need to include applications on same site." Partner respondent

On communication channels, some respondents specifically praised the stakeholder newsletter and Social Security Scotland-run meetings and events, saying that these channels were helpful and informative. However, others thought meetings and events weren't always informative enough and could be improved.

"The Newsletter that comes regularly. Great to find out what is happening and the new types of help available (now or in the future)." Partner respondent

"[…] The online engagement sessions have also been helpful in keeping up to date with changes and in understanding certain benefits." Partner respondent

"I have found the engagement/update/training events a bit of a mixed bag - some have been incredibly useful with new and useful information; others have felt repetitive and not really dealing with the issues arising around the Social Security Scotland benefits." Partner respondent

8.2.   Partner views on the mygov.scot website

Partner survey respondents who support clients were asked about their experience of navigating the mygov.scot website and finding information (Table A5).

Table A5:   Partner respondent views on the mygov.scot website
(n=185-186) Respondents who support clients, Row percentages

How much do you agree or disagree with the following…:	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree	Don't know / Not applicable
It was easy to navigate the website	76%	13%	10%	-
I was able to find the information I was looking for	79%	15%	6%	-
The information was easy to understand	80%	15%	5%	-

Most respondents agreed or strongly agreed that it was easy to navigate the mygov.scot website (76%) and that they were able to find the information they were looking for (79%). Around one in ten (between 6% and 10%) disagreed with this. Eight in ten (80%) said the information on the mygov.scot website was easy to understand. This was the first year that the survey asked partner respondents for their views on the mygov.scot website. Year-on-year trend analysis is therefore not available for these findings. It will be included in future reports if these questions are asked in future surveys.

When asked to comment on their experience of the mygov.scot website, many respondents said the website was easy to use and contained clear information that was easy to understand. Respondents had used the site to access information for clients on things like benefit eligibility and how to apply and said it was a useful tool for both partners and clients. A few praised the use of plain English on the website and said it was a user-friendly resource. Some felt the website and its contents were straightforward for stakeholders with benefit knowledge but recognised it could be challenging for clients who need additional support, don't have existing benefit knowledge, or are unable to access digital information and services.

"User friendly and easy to navigate." Partner respondent

"The information clearly [explained] the criteria and it was easy to make applications." Partner respondent

"Again plain English is used and easy to understand - however I have a benefit background so I know what I am looking for/expecting." Partner respondent

"The website is really for professionals or those with a greater understanding of the benefits system. For adults who require communication support, or have limited capacity, it is almost impossible for them to navigate through the site."
Partner respondent

Some respondents said the mygov.scot website was hard to navigate at times and it could be difficult to find what they were looking for. They felt the layout was complex and said information wasn't always clear, helpful, or up to date when they did find it. Some had bookmarked certain pages in order to save time and avoid repeatedly navigating through the website. Others described using different resources when they couldn't find what they needed on the website.

"I feel you're scrolling through pages and pages to get to the right area you're looking for. I find it eventually, but it takes a lot longer than it should."
Partner respondent

"It doesn't always give all the information I need and I often have to use other resources e.g. Ask CPAG." Partner respondent

"Some of the information is convoluted - just keep things simple for people to understand." Partner respondent

9. Annex B: About the partner survey respondents

This Annex presents a summary of partner respondents' background characteristics. In some cases, results have been supressed where the number of respondents in a category is low in order to prevent disclosure. This is shown by * in the tables. To prevent the suppressed figure being calculated from other values shown, the next smallest category has also been suppressed in the table. This has been done in cases where there was a risk of respondent disclosure.

Table B1: **How do you engage with Social Security Scotland?****

Response options	All respondents (n=229)
I support clients / potential clients of Social Security Scotland	90%
I have attended a Social Security Scotland engagement event	52%
I engage with Social Security Scotland's Local Delivery staff	29%
I have sent a query or requested information / data from Social Security Scotland	24%
I engage with Social Security Scotland in a different way	11%
I am a member of the Operational Reference Group	*
I am a member of the Inclusive Communications Stakeholder Reference Group	*

* Suppressed due to low numbers
** Respondents could select more than one option

Table B2: **Organisation type***

Response options	All respondents (n=229)
Third Sector or Charitable Organisation or Advice Provider	56%
Local Government (including welfare rights services in local authorities)	31%
NHS or Health Profession	7%
Social Landlord	7%
Other Government Department (for example, the Scottish Government, UK Government or Department for Work and Pensions)	1%
Other Public Sector	0%
School or Further / Higher Education	-
Other	1%

* Respondents could select more than one option

Table B3: Does your organisation primarily offer advice, support or information to a specific client group?*

Response options	All respondents (n=204)
People with health conditions (including mental health conditions)	90%
Disabled people	85%
People on low income	84%
Carers (including kinship carers)	80%
Older people	76%
Homeless people	65%
Young people	63%
Minority ethnic groups	61%
Care leavers	55%
LGBTI communities	54%
Other	10%

* Respondents could select more than one option

Table B4: **Local authority area***

Response options	All respondents (n=222)
National	7%
East[9]	48%
West[10]	29%
Central[11]	51%

* Respondents could select more than one option

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[9] Aberdeen City, Aberdeenshire, Angus, Dundee, East Lothian, Edinburgh, Fife, Midlothian, Perth and Kinross, West Lothian.

[10] Argyll and Bute, Dumfries and Galloway, East Ayrshire, Glasgow, Na H-Eileanan Iar, North Ayrshire, Scottish Borders, South Ayrshire.

[11] Clackmannanshire, East Dunbartonshire, East Renfrewshire, Falkirk, Highland, Inverclyde, Moray, North Lanarkshire, Orkney Islands, Renfrewshire, Shetland Islands, South Lanarkshire, Stirling, West Dunbartonshire.

10. Annex C: About the staff survey respondents

This Annex presents a summary of staff respondents' demographic and background characteristics. In some cases, results have been supressed where the number of respondents in a category is low in order to prevent disclosure. This is shown by * in the tables. To prevent the suppressed figure being calculated from other values shown, the next smallest category has also been suppressed in the table. This has been done in cases where there was a risk of respondent disclosure.

Table C1: Gender

Response options	All respondents (n=1,460)
Women	56%
Men	30%
Other	*
Prefer not to say	*

* Suppressed due to low numbers

Table C2: Age

Response options	All respondents (n=1,468)
16 to 24	*
25 to 34	20%
35 to 44	28%
45 to 54	22%
55 to 64	16%
65 or over	*
Prefer not to say	12%

* Suppressed due to low numbers

Table C3: Ethnicity

Response options	All respondents (n=1,430)
White groups	84%
Minority ethnic groups	4%
Prefer not to say	12%

Table C4: Long term physical or mental health condition

Response options	All respondents (n=1,449)
Has a long term physical or mental health condition	34%
No condition	54%
Prefer not to say	12%

Table C5: Grade from most junior to most senior

Response options	All respondents (n=1,459)
A-band	25%
B-band	64%
Fast Stream	-
C-band	6%
Senior Civil Service	*
Prefer not to say	*

* Suppressed due to low numbers

Table C6: Working pattern

Response options	All respondents (n=1,441)
Full time (37 hours a week)	80%
Part time (less than 37 hours a week)	14%
Prefer not to say	6%

Table C7: **Time in service in Social Security Scotland**

Response options	All respondents (n=1,209)
<1 year	5%
1-3 years	64%
3-5 years	21%
5+ years	9%

Table C8: **Interaction with clients as part of job role**

Response options	All respondents (n=1,486)
Interacts with clients as part of job role, or will do so in future	65%
Does not interact with clients as part of job role	35%

11. 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. This email address is for research related requests only. Any unrelated queries (e.g. benefit information) will be automatically deleted.

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