Social Security Scotland
Tèarainteachd Shòisealta Alba

social research

Charter Research 2023-2024

Summary report

Dignity, fairness, respect.

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Contents

Background

This report presents a summary of results from research with Social Security Scotland staff and partners about their experiences 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 took place from February to July 2024. It involved a survey completed by 1,490 staff (a response rate of 36%); two focus groups with six colleagues from Social Security Scotland's Client Experience teams; and a survey completed by 229 partners.

A People's Service

Partner experiences

Partner respondents were positive about Social Security Scotland's approach towards delivering a fair and dignified service for the people of Scotland.

Some described positive experiences of working in partnership with Social Security Scotland, with praise for the staff they engaged with and stakeholder events. Respondents raised a need for closer engagement with partner organisations to help improve the service for clients.

Around half of partner respondents thought that Social Security Scotland had been open (48%) and honest (49%) about challenges to the delivery of the service and in communications to clients such as decision letters.

Some felt Social Security Scotland could be more forthcoming about the challenges faced. Many wanted more transparency about the length of time needed to process applications for Adult Disability Payment and Child Disability Payment.

57% Over half of partner respondents said Social Security Scotland's overall service was good or very good.

64% Around two-thirds of partner respondents said Social Security Scotland had worked well with their organisation.

"Very responsive and proactive e.g. we organised a drop in session […] at the suggestion of our local Social Security Scotland worker and [it] was a very positive experience for all involved."

Partner respondent

"[…] 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

Staff experiences

Staff respondents said what helped them to feel confident including:

- a culture of equality and fairness within their team,
- previous personal and professional experience,
- and guidance and training received as part of their role.

Respondents mentioned a personal commitment to treating others with dignity, fairness and respect. They considered the Charter values to be a core part of their role.

Respondents described challenges to delivering a service in line with the Charter. Examples 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.

89% Most staff respondents felt confident or very confident to deliver a service without discriminating.

85% Most staff respondents felt confident or very confident to deliver a service based on a human rights system.

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

"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

"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

Processes that Work: Partner experiences

Getting in touch with Social Security Scotland

A fifth (18%) of client-facing partner respondents found it easy or very easy to contact 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. Others reported long waits to speak to an adviser, although some noted that waiting times had improved. Some felt call waiting times were a barrier to clients who preferred or needed to access the service by phone.

Some found webchat to be a useful service. Others experienced issues using webchat or didn't get the information they needed.

Many respondents mentioned problems with third party consent. Some had experienced problems with three-way calls or the security process at the start of calls.

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.

90%

Nine in ten partner respondents said they support clients or potential clients of Social Security Scotland as part of their role.

"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

"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 […].

Partner respondent

Experiences with staff

Partner respondents praised staff and described them as helpful, patient and knowledgeable. Many said client advisers dealt with their queries promptly.

Some respondents said staff were pleasant but didn't always have the right knowledge to help. Some experienced inconsistencies in information, knowledge, and helpfulness across different staff members. A few mentioned 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.

There was wide praise for Local Delivery staff with respondents describing them as friendly and approachable. A few said Local Delivery staff were limited in some of the information or support they could provide, or weren't always available to assist.

"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

47%

Around half of client-facing partner respondents rated their experience of speaking to staff on clients' behalf as good or very good.

"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

"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

Applications

Most written comments were about applications for Adult Disability Payment and Child Disability Payment.

Partner respondents said applications for disability payments were straightforward, laid out clearly, and questions were easy to understand. Some preferred the online application, whilst others felt the paper form was helpful for showing clients what questions would come next.

Others said disability payment applications were complex and took a long time to complete. Some said the questions didn't allow clients to accurately explain their or their child's condition and felt this could be improved. Some said the length and complexity of applications had discouraged some clients from applying for disability benefits.

Many respondents mentioned examples of digital exclusion for clients who couldn't access online information and applications.

Respondents said the Local Delivery service was a useful way for clients to get help to apply. Suggestions to improve included the ability to refer clients directly to Local Delivery and an online option for making appointments.

34% Around a third of client-facing partner respondents said it was easy or very easy to go through the application process with clients.

29% said it was difficult or very difficult.

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

Working for Social Security Scotland

Staff knowledge and skills

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

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.

Training covered topics like:

- equality, human rights and discrimination,
- call handling and telephony,
- safeguarding and risk of harm,
- and Social Security Scotland's service and benefits.

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.

78%

Most staff respondents who interact with clients as part of their job, or will do so in future, rated their knowledge of the social security system in Scotland as good or very good.

"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 line manager and feedback from colleagues."

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

Support for staff

Staff respondents said line managers were approachable, knowledgeable, understanding and accommodating.
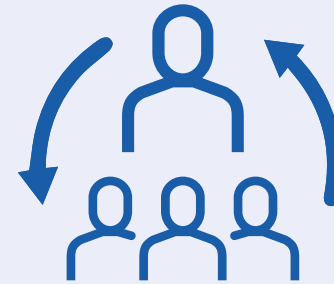
Respondents said line managers offered frequent communication and supported them with work issues, personal circumstances, and additional needs. Opportunities for professional development and input into team decision-making had made respondents feel valued and empowered.

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.

79%

Most staff respondents said support from their line manager had been good or very good.

"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 is not very understanding of my disability and the challenges I face."

Staff respondent

"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

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,
- and information and internal systems being incompatible with assistive technology.

79%

The majority of staff respondents felt confident or very confident to deliver a service based on inclusive communication.

"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

"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

A Learning System

Experiences of giving feedback – partners

Partner 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, responsive and took suggestions on board. However, some said staff didn't always make it clear whether feedback would be actioned.

Some respondents noticed changes as a result of their feedback and were pleased with this. Others said Social Security Scotland had not acted on their suggestions or had been slow to deal with issues raised. Some recognised it would take time to make large-scale improvements.

Other issues with the feedback process included:
- delays hearing back from Social Security Scotland or not hearing back at all,
- inconsistent or conflicting communications in response to feedback,
- and wanting to give feedback but not knowing how to do so.

50% Half of partner respondents thought Social Security Scotland is open to feedback.

25% A quarter thought Social Security Scotland acts on feedback.

"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

"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 […]."
Partner respondent

Experiences of giving feedback – staff

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. They reported an internal culture of encouraging feedback and felt suggestions were listened to.

Suggestions had covered topics like:

- changes to ways of working,
- better communication within and between teams,
- and improvements to processes, systems, policies and guidance.

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

80%

Most staff respondents said they would speak up if they saw something wasn't working or thought something was wrong in Social Security Scotland.

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

"[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

Improvements based on feedback

Partner respondents noted that Social Security Scotland had taken measures to address to call waiting times and delays in processing applications based on feedback.

Staff feedback had led to improvements to Social Security Scotland's service as well as internal policies and processes.

There were improvements to:

- processes for communicating with clients,
- how applications are managed and processed,
- guidance for supporting vulnerable clients,
- staff processes for Local Delivery appointments,
- and ways of working within specific teams.

"[…] 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

"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

Mistakes and complaints

Partner respondents described problems and mistakes made by Social Security Scotland including:

- applications being lost or not received,
- incorrect or conflicting communications to clients,
- 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 a lack of other ways to escalate issues.

Respondents said staff apologised when things went wrong. 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.

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

Other common complaints were about:

- receiving conflicting information or no information about the status of an application or change of circumstances,
- not receiving call backs,
- and problems experienced during case transfer.

"[…] 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

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

Partner respondent

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.

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