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Social Security Experience Panels: Annual Report 2021



Equality, Poverty and Social Security



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Foreword

I am pleased to publish the Scottish Government's fourth annual report on the work of the Social Security Experience Panels.

2021 was another busy and challenging year for our work with members of the Experience Panels. The Coronavirus (COVID-19) pandemic has continued to impact on the ways we work and the types of research we can undertake. Nevertheless, it is as important to us as ever to ensure that the voices of those with experience of the current benefits system are embedded into the design of the new social security system in Scotland.

With Social Security Scotland delivering 11 benefits (and our 12th – Adult Disability Payment – is being introduced in March 2022), it now feels like an appropriate time to pause and reflect on what has been achieved since the Experience Panels were set up in 2017. Panel members have been involved in shaping most of these benefits, as well as helping us to consider everything from the style and language used in letters and the application processes, to the look and feel of our buildings.

Child Disability Payment was rolled out nationally in November 2021. This was the first application-based disability benefit to be introduced by the Scottish Government, and it coincided with the introduction of our new Local Delivery service. The new service allows clients to book an appointment to meet with a specially trained adviser, at a venue within their local community or at their home, or request a video call or telephone appointment. The service offers support to people applying for any of the benefits that Social Security Scotland currently offers. This year, Adult Disability Payment will roll out nationwide from August 2022, following a number of pilot phases which commence in March 2022.

During 2021 we also worked with panel members to explore topics such as carer benefits, data privacy and understanding how the Coronavirus (COVID-19) pandemic has effected how people want to communicate with Social Security Scotland. We have undertaken a comprehensive programme of user research, working with panel

members to help test and refine processes and services such as the transfer from Personal Independence Payment to Adult Disability Payment, local delivery and decision making.

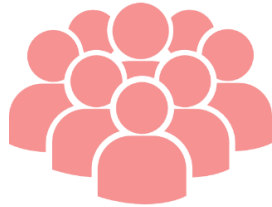
The Social Security Experience Panels are a crucial part of our work, as we begin the delivery of Adult Disability Payment and prepare for the introduction of Scottish Carers Assistance. The dedication and openness of our panel members is fundamental to building a better social security system for the people of Scotland. We will continue to work together.

Ben Macpherson

Minister for Social Security and Local Government

Experience Panels 2021 in Numbers

2,195
Active
Panel
Members



8
surveys

with **2107** responses



234
user testing sessions



21
interviews



7
reports and **3** visual
summaries



4
panel member
newsletters

Introduction

The Scottish Government is becoming responsible for some of the benefits previously delivered by the Department for Work and Pensions (DWP). As part of the work to prepare for this change, in the summer 2017 the Scottish Government set up the Social Security Experience Panels.

The Experience Panels are made up of people who have experience of at least one of the benefits that are coming to Scotland. The Scottish Government works with panel members to inform key decisions in the design of social security in Scotland. This is the fourth annual report for the Experience Panels programme of research. It aims to feed back to panel members and others interested in the work about what was achieved in 2021 and what is planned for 2022.

2021 was our fourth full year of running research with panel members. The Coronavirus (COVID-19) pandemic continues to have an impact on the types of research activities we carry out. Without being able to offer any face-to-face meetings, we have used surveys, video interviews and phone interviews to hear from panel members since March 2020. This is to keep both participants and our staff safe. We would like to thank all panel members for their continued understanding and flexibility during this time. Hearing panel members' views and experiences continues to play a critical role in the design of the new social security system in Scotland.

In 2021, we published more reports about our work with Experience panel members. As in 2020, we worked with our partner user researchers to undertake increasingly detailed research with panel members with the aim of testing and refining how some of Social Security Scotland's systems and processes work in practice.

Finally, we have been doing some joint research projects with Social Security Scotland's Client Panels. We have also spent more time sharing our findings and approach with others in the Scottish Government and beyond.

2021: The Research

Our research programme with panel members in 2021 covered a range of topics. This chapter will outline what we have covered. It will also give some examples of our findings and how they are being used to make decisions.

We report on our findings through full research reports and shorter, visual summaries which are designed to be as accessible as possible. These are sent to panel members as soon as they are published so they can see what they have said and how we have used the findings.

Our Reports

In 2021 we published 7 reports and 3 visual summaries, including on:

- How Social Security Scotland can record and support clients' accessibility, disability, and other needs.
- Experience Panels members' views on topics such as the appointees system and benefit take-up.
- Understanding how the Coronavirus (COVID-19) pandemic has effected how people want to communicate with Social Security Scotland.
- The Seldom heard programme of research, covering topics and groups that are sensitive, marginalised or dispersed, who are less likely to be visible in a project like the Experience Panels.

All reports can be found on the [Experience Panels publications website](#).

What we have covered

As benefits move to Social Security Scotland, the work we do with Experience Panels members has changed over time. In 2017 and 2018 we tended to ask general questions about people's

experiences and desires for the new system. In 2019 and 2020, our questions became more specific, as the detail of the processes began to be developed. This continued during 2021 as we increasingly asked panel members to become involved with testing and refining how some of the systems and processes work in practice. This is to make these as simple and easy to use as possible for the people who will need them.

We are very grateful that so many panel members have shared with us their past experiences of the benefits system and gave up their time to help test ideas. It is an important time to reflect on what has been achieved since 2017 and how we have got here with their help.

Social Security Scotland are now delivering 11 [benefits](#):

- Best Start Grant Pregnancy and Baby Payment
- Best Start Grant Early Learning Payment
- Best Start Grant School Age Payment
- Best Start Foods
- Funeral Support Payment
- Young Carer Grant
- Carer's Allowance Supplement
- Job Start Payment
- Child Winter Heating Assistance
- Scottish Child Payment
- Child Disability Payment

Panel members and other citizens have been involved in shaping each of these benefits, as well as contributed to the design of Social Security Scotland's processes and systems for:

- Appointments
- Applications
- Social Security Scotland buildings, logo and branding, staff uniform and recruitment
- Redeterminations and appeals
- Complaints and feedback

- Advocacy and appointees
- Communication channels and materials
- Case transfer
- Local delivery

We now have over 63 reports on the [Experience Panels publications website](#) detailing this work.

Thank you to all panel members for their work over the past four years. We will continue to speak to panel members about what other benefits and processes should look like to ensure that Social Security Scotland is delivering a service with fairness, dignity and respect.

2021: How we worked

This section will give a project update on what we were up to in 2021. It will cover:

- Research with Seldom Heard Groups
- Sharing our approach
- Research with Social Security Scotland Clients
- Feedback from Experience Panel members
- User testing work

Research with Seldom Heard Groups

In the 2019 and 2020 Annual Reports we highlighted the programme of work to engage with seldom heard groups. This covers topics and groups that are sensitive, marginalised or dispersed, who are less likely to be visible in a project like the Experience Panels. We know many of these groups have particular experiences or characteristics that mean they may face barriers when engaging with public services and we want to make sure Social Security Scotland is designed with these on mind.

Our programme of seldom heard research, has four strands:

- **Mobile populations:** Gypsy/Traveller populations, temporary EU migrants, refugees.
- **Care Experienced and Carers:** Care experienced people, foster and kinship carers, young parents, single parents.
- **Vulnerable groups:** people who have offended, people with experience of homelessness, veterans.
- **End of life:** people with terminal illnesses, bereaved families.

We have commissioned external experts to conduct two stages of fieldwork with each of these groups. Some of this work had to be paused during 2020 due to Coronavirus (COVID-19) restrictions. Work in this area has resumed remotely where possible, however ongoing restrictions have impacted on the ways researchers have been able to recruit participants. This is because researchers often

ask for help from organisations and charities who work with the groups of people they are interested in doing research with. With COVID-19, many organisations stopped face-to-face contact and began to deliver services remotely. This has meant that researchers have not been able to recruit as many participants as originally planned.

At the end of the second stage of fieldwork, the external researchers will provide a report outlining their advice for recruiting and undertaking research with each of the groups. We are keen to make sure we learn from them.

We published the findings from wave one of this work in December 2021. We will share the findings from wave two of fieldwork in 2022.

Spotlight On: Research with Seldom Heard Groups Wave 1 findings

The three reports published in December 2021 focused on the following strands: [vulnerable groups](#), [carers and care experienced people](#), and those at the [end of life](#).

We found that the three groups faced some common barriers when engaging with the social security system such as: a lack of knowledge and awareness of the benefit system, difficulty finding information, complex application forms, and unpleasant and stressful interactions with staff from DWP and Job Centre Plus.

The three groups also reported and suggested some common positive experiences, called enablers. These included the need for a variety of channels of communication and clear and streamlined information. Other enablers reported were the key role of third sector organisations in helping people navigate the benefit system, as well as knowledgeable and empathetic benefit staff.

Certain barriers and enablers were particular to some of the groups.

Vulnerable groups commonly experienced barriers around restrictive application forms, and spoke of health assessment staff as lacking training or being insensitive to mental health conditions and trauma. Participants for this strand suggested the following enablers: simplified application forms and different ways of assessing eligibility. They suggested that GP records and medical evidence should weigh heavier during benefit assessments and that health assessment reports should be agreed jointly between the assessor and applicant.

Carers and care experienced participants reported barriers around health assessments being unable to capture fluctuating and chronic conditions. They also spoke of financial hardship as

a result of long waiting times, changing benefits and overpayments. Common enablers mentioned by this group were reducing waiting times between application and payment, and providing more flexibility to pay back overpayments, loans and advance payments.

Frequent barriers experienced by end of life participants were around lack of certainty about support available and what happens to benefits after a person with terminal illness dies. They also flagged financial and practical barriers when attending appointments. Common enablers suggested by participants in this group were the provision of more proactive financial advice from health professionals, as well as a 'fast-tracked' benefit process in the context of a terminal illness. Another suggested enabler was a single point of contact in benefit agencies.

The Scottish Government and Social Security Scotland has addressed or will undertake work to address the barriers and suggested improvements set out in this research.

You can read more about the findings and next steps for this work on the [Experience Panels publications website](#).

Sharing our approach

In 2021 we spent more time sharing our findings and approach with others in the Scottish Government and beyond.

The Scottish Government has made a range of public commitments to put people at the heart of everything we do. This means including the voices of those with lived experience across a range of policy areas. A few examples include:

- [The Poverty and Inequality Commission](#) provides independent scrutiny and advice to Scottish Ministers on poverty and inequality. They have set up a panel of 19 experts by

experience from across Scotland, which informs and supports the work of the Commission, ensuring that those affected by poverty are central to identifying issues and developing solutions.

- Scottish Government has funded the [Mental Health Foundation](#) and [Health and Social Care ALLIANCE](#) to set up a lived experience panel to work with them to inform and advise on policy development.
- Transport Scotland has set up a People's Panel to inform delivery of the National Transport Strategy. The Panel comprises a range of people with different experiences of accessing and using transport. In addition, Transport Scotland has recently undertaken qualitative research with low income families to explore their [experiences of transport in response to the Child Poverty Delivery Plan](#).

These are just a few examples of the types of lived experience work taking place across the Scottish Government. There is also a new Participation and Lived Experience Working Group which aims to support government researchers doing this work.

In the Experience Panels team, we are often asked to give advice to others considering lived experience work, discussing how our panel was set up and is run, with a focus on ensuring accessibility and support for panel members.

We will continue to share our findings and be open about our approach with panel members, social security colleagues, external stakeholders and advisory groups, and colleagues across government and the wider public sector.

Research with Social Security Scotland Clients

In the 2020 Annual Report, we highlighted a new programme of research in Social Security Scotland called [Client Panels](#). The Client Panels are made up of clients who have volunteered to take

part in research projects to support the continuous improvement of Social Security Scotland's benefits and services.

Like Experience Panels, Client Panel members share feedback about their experience and their ideas for improvements through surveys, interviews and other research methods. Client Panels also help Social Security Scotland understand how they are delivering against the commitments set out in Our Charter and the Charter Measurement Framework.

As of January 2022, there are nearly 3000 Client Panel members. Over time, membership will grow to represent the full range of benefits delivered by Social Security Scotland. At the moment, people can be members of both the Experience Panels and the Client Panels. Clients are offered the chance to join the Client Panels when they complete the [Client Survey](#). This survey allows Social Security Scotland clients to tell Social Security Scotland about their views and experiences of the service. It goes to everyone who has applied for or received a benefit.

In 2021, the Client Panels and Experience Panels teams worked closely together to carry out research with both groups. This is where we feel there is benefit from including participants from both live and future benefits.

In early 2021, the first joint project explored how the Covid-19 pandemic may have changed how clients want to interact with Social Security Scotland. In the summer, members who live in or around Dundee and Glasgow were invited to take part in a survey about Social Security Scotland's main buildings in those cities, seeking views about things like how staff should welcome you to the buildings and the type of uniform staff should wear. The third joint project focused on the working location of Social Security Scotland staff and their opening hours.

We will publish reports and summaries for the last two projects later this year. The next section will give more detail on some of this work.

Spotlight On: Coronavirus impact on communication preferences

From January to April 2021, we asked both Experience Panel and Client Panel members to tell us about how the Coronavirus (COVID-19) pandemic has impacted on their preferences for how they would want to interact with Social Security Scotland.

In total, 484 members across both Panels chose to complete a survey exploring this topic. Follow-up interviews were carried out with 41 panel members.

The research looked at experiences and views on interacting with Social Security Scotland before, during and after the COVID-19 pandemic.

Around a quarter of survey respondents said that their preferred way to get in touch would be different during or after the pandemic. Older respondents and respondents with a long-term health condition or disability were more likely to say this. Many of those who indicated a change said they would prefer more online communication.

Over three quarters (79%) of respondents said they could be interested in meeting Social Security Scotland in person in the future. Respondents with a long-term health condition or disability were more likely to say this. The majority (67%) said they would only feel comfortable meeting in person once all COVID-19 restrictions had been lifted.

The majority said they would expect some safety measures to be remain even after restrictions were eased or removed.

You can read more about the full findings of this research and how they are being used by teams working in a range of areas in both Scottish Government and Social Security Scotland here: [Social Security client and experience panels research: effects of](#)

[the coronavirus pandemic on communication preferences - gov.scot \(www.gov.scot\)](https://www.gov.scot/resources/consultations-petitions/consultations/coronavirus-communication-preferences/)

Spotlight On: Charter Measurement Framework

In November 2021, Social Security Scotland published the latest [Charter Measurement Framework report](#). The framework is a list of measures relating to the commitments set out in [Our Charter](#), which sets out what people should expect from the new social security system. The Measurement Framework has two purposes. First, it shows how Social Security Scotland and the Scottish Government are getting on with delivering the commitments. Second, it helps Social Security Scotland and the Scottish Government to constantly improve what they are doing. The Charter and the Charter Measurement Framework were both developed with Experience Panel members.

The report includes statistics, but also research with Social Security Scotland clients, staff and stakeholders. Most clients interviewed as part of the Charter research felt Social Security Scotland had been open with them by providing clear information about processes and timescales and regular updates on applications. Client interviewees said staff made them feel comfortable, treated them with kindness and listened to them. Nine in ten (94%) Client survey respondents who had been in contact with Social Security Scotland staff 'agreed' or 'strongly agreed' that they were treated with kindness.

Every year Social Security Scotland will collect information and data on the measures, put it into the framework and then publish the results. This is the second time the Charter Measurement Framework has been published.

Thank you to any panel members who helped to design Our Charter and the Charter Measurement Framework.

Feedback from Experience Panel members

It's incredibly useful for us to understand who is on the Experience Panels and how they are experiencing being involved. The most recent survey asking panel members about this was carried out at the end of 2021.

In this survey, we asked panel members to update the information we hold about them. This information helps us to invite and hear from specific people when carrying out research on a given topic.

We also asked panel members to give feedback on their experience of being part of the Experience Panels. Nine out of ten (91%) panel members agreed or strongly agreed that they enjoyed being a member of the Experience Panels. Panel members said that having the opportunity to take part in research to help shape decision making made them feel listened to, and that they were making a difference to the lives of others. Over eight in ten panel members agreed that they were happy with the number of opportunities to take part in research (85%) and that the opportunities are relevant to them (80%).

There were some areas that respondents highlighted as suggestions or areas for improvement. Some panel members expressed missing group discussions and face to face events which have stopped since the start of the Coronavirus (COVID-19) pandemic. We continue to review how we interact with panel members in line with national restrictions and professional research guidance. We will offer face to face events once it is safe to do so. In the meantime, we are keen to ensure panel members can get involved in a way that suits them, whether through surveys, phone or video interviews. Another suggestion from panel members about how we work is for more updates and information about how Experience Panels research has been used in practice to help shape decisions about Social Security Scotland.

We will share the findings of this survey early in 2022.

User research and testing

In 2021, we worked with our partner user researchers to give panel members opportunities to get involved in shaping specific elements of the design of Social Security Scotland's systems and processes. This is different from our usual surveys and interviews. It involves asking panel members to look at draft parts of a process to make sure those systems are as easy to use as possible.

In 2021, there were five rounds of user research and at least 234 panel members took part in user testing interviews.

User testing like this feeds directly into design, and doesn't have a research report like our other work. We do, however, include articles in our newsletters on how such testing has shaped processes.

There are more user research sessions scheduled to take place over 2022.

Plans for 2022

This section will look at our plans for 2022.

This year, we will continue our programme of work with panel members. We will continue work on specific benefits. In early 2022, this will include work on Low Income Winter Heating Assistance, the replacement for Cold Weather Payment and Scottish Carers Assistance, the replacement for Carers Allowance.

We will continue to cover a range of topics to do with how social security works across all benefits, as well as more specific user testing on Adult Disability Payment, Short Term Assistance and the case transfer process. We will also work with our partner researchers in Social Security Scotland, working jointly on research when this is appropriate.

Conclusion

2021 was another busy year for the Experience Panels. We would like to thank all panel members for their work. With panel members' help, we continue to ensure that people who have experience of the current benefits system are helping to shape and design the new system for Scotland. We look forward to continuing to work with Experience Panels members throughout 2022 to build a social security system for Scotland that is built on fairness, dignity and respect.

How to access background or source data

The data collected for this research publication:

may be made available on request, subject to consideration of legal and ethical factors. Please contact SocialSecurityExperience@gov.scot for further information.



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The views expressed in this report are those of the researcher and do not necessarily represent those of the Scottish Government or Scottish Ministers.

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