

## EQUALITY, POVERTY AND SOCIAL SECURITY

# Social Security Charter: Research findings from the Charter Review

## Introduction

The Scottish Government is now responsible for some of the benefits previously delivered by the Department for Work and Pensions.



Social Security Scotland is the executive agency who deliver social security payments.



In 2018, the [Scottish Social Security Charter](#) was created.

“Our Charter” is made up of four sections which have a series of commitments to be delivered by the Scottish Government and Social Security Scotland. The Charter describes how the Scottish social security system works and how clients should be treated. It is written in law that the Charter should be reviewed every five years.

Research was carried out in 2023 to review the commitments in the Charter. This summary presents the findings from that research.

## About the research

The Charter was co-designed by people who had experience of the social security system.



**Co-design** brings together input from, and shares power between, policy makers, individuals and organisations who have experience and expertise on an issue.



A similar approach was taken to review the Charter. Input from people with experience of the Scottish social security system was at the center of the review process. Clients took part in the research via a **survey**, **interviews**, and a series of online **workshops**.

The research also included input from:

- Officials from the Scottish Government and Social Security Scotland.
- Partner organisations who work with Social Security Scotland or support clients.

The aim of the research was to produce a **proposed revised Charter** agreed by core client group during the workshops.



The final revised Charter will not be implemented until it is agreed by the Scottish Parliament.

## Who took part

### Clients

Research with clients was conducted using the Social Security Scotland Client Panels. The Client Panels are made up of

clients from across Scotland who have made an application or received a payment from Social Security Scotland.



16 participants took part in at least one workshop. These participants are the **core client group**.



864 respondents took part in a **survey**.



18 participants from **seldom heard groups** took part in an interview.

### About the **core client group**

- 16 participants took part in at least one workshop.



More women than men.



Participants were aged between 23 and 68.



Some had a disability or long-term health condition.



Some were from an ethnic minority group.



Some had caring responsibilities.



Most lived in an urban area.

Most participants had experience of Adult Disability Payment or Child Disability Payment. Some had experience of carers benefits or Scottish Child Payment.

### About the **survey respondents**

- Around three quarters were women.
- Over half had a disability or long-term health condition.
- Around half had caring responsibilities.



There was representation for all local authority areas among the respondents.

### About the interview participants from **seldom heard groups**

- More women took part than men.
- Some had a disability or long-term health condition.
- Some had caring responsibilities.

Interview participants represented a range of seldom heard voices, including:



People with English as a second language.



People with recent experience of homelessness.



Refugees.



People who experience digital exclusion.

### **Social Security Scotland staff**



Five online focus groups were held with 26 staff from Social Security Scotland.

## Partner organisations



Seven partner organisations took part in the research. Five organisations completed a survey and two took part in an interview.

## Government officials



A group of around 35 officials in relevant areas across Social Security Scotland and the Scottish Government gave regular input throughout the research process.

## Workshops with the core client group

Researchers organised five online workshops which each lasted for two hours.



During the workshops, the core client group reviewed each section of the Charter in detail.



They heard presentations and talks from researchers, the Scottish Commission on Social Security, the Scottish Human Rights Commission and Social Security Scotland.



The core client group suggested changes to the Charter and researchers also developed changes based on their feedback.



Changes were shared back to the core client group who said if they agreed or if anything was missing or should be changed.

The core client group were invited to share their experiences of taking part in the workshops via a survey.

All who responded agreed that they understood how their input would be used and taking part in the workshops allowed them to make a meaningful contribution to the Charter review process.



Some said they had felt listened to and all said they would be very likely to take part in future Client Panels research.

Quote from core client group participant:



“It felt like my views were being taken seriously and would be used in the Charter review process itself.”

## Awareness of the Charter

There was mixed feedback about the awareness of the Charter and the Charter Measurement Framework.



Among staff participants, familiarity varied although most remembered taking part in training about the Charter when they first started at Social Security Scotland.



A third (33%) of client survey respondents said they were familiar with the Charter.

## Views about the Charter



Overall, clients, staff, and partner organisations said the Charter continued to reflect important values and priorities.

## Strengths of the Charter are:



It was co-designed with people who have experience of social security.



It holds the Scottish Government and Social Security Scotland to account. Performance is measured via the Charter Measurement Framework. The framework measures how well the commitments in the Charter are being delivered each year.



The Charter has helped to shape a positive culture in Social Security Scotland. It also does a good job of setting out clients' rights and how they should be treated.

## Quote from partner interview participant:



“[The Charter] makes it clear that dignity, fairness and respect are at the heart of what Social Security Scotland do. It works well in driving this type of culture.”

There were some **concerns** about the Charter and how it is being delivered. Some Social Security Scotland staff said poor processes and a lack of training and support meant not all of the Charter commitments were delivered.



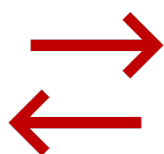
Some partner organisations said clients' experiences of the service didn't always “match up” with the commitments in the Charter.

## Quote from staff focus group participant:



“I think [the Charter is] aspirational, I wouldn't necessarily say that we get it right with everything that's in it yet. I think there are still some parts of it that are aspirational or what the organisation hopes to achieve, but they are still building towards fully achieving them.”

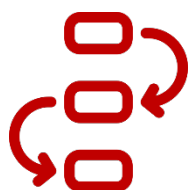
## Charter: Changes to structure



The original four sections have been retained. Some commitments have been moved between sections. This makes sure that commitments related to similar themes are grouped together.

The wording of the sub-headings has been updated to make it clearer who is responsible for delivering the commitments under each theme.

New sub-sections have been added to break up each of the four sections and to give more detail about how each group of commitments will be delivered.



The core client group agreed these structural changes improved the flow of the Charter and made it clearer what each section was focused on.

## Charter: Changes to language

Participants said the language used in the Charter should be specific and avoid vague, unclear statements.



Social Security Scotland has been delivering benefits for over five years. The language in the Charter has been updated to use more active words in the present tense.



The words and phrases used to describe Social Security Scotland processes have also been updated. This makes sure the language reflects the words clients are used to seeing from Social Security Scotland. For example, the word 'assessments' has been replaced with 'consultations'.



## Charter: Changes to commitments

All original Charter commitments have been retained in some form in the proposed new version.



Some new commitments have been proposed. These reflect the priorities described by clients, staff and partner organisations.



A key priority was to provide clients with more information on what they can expect from the social security system. New commitments have been added which outline the application journey.



Another priority was how the Scottish Government and Social Security Scotland are held to account for delivering the Charter commitments. Changes have been included to provide more information about how performance and feedback are used to make improvements. Changes make it clearer how clients can raise issues if their rights aren't met and provide views about their experience.



Communication was also a priority for clients, staff and partner organisations. Some changes have been proposed to make it clearer how clients' communication needs are supported.



A final example of where changes have been made to reflect priorities is in the information about support for clients. This includes support to engage with Social Security Scotland as well as links with other forms of support that may help clients.

## Communicating the Charter



Overall, feedback was positive about the way the Charter is written. Partner organisations who took part in the research said it was clear and about the right length.

On the types of documents client survey respondents would read about the Charter, around half said they would likely read a **visual summary** (57%) or a document of up to **5 pages of writing** (48%).



There were suggestions to include more visual elements like icons and charts to make the Charter more engaging.



Around a third (35%) of client survey respondents said a full version of the Charter was the most useful way to share it with clients.



Over half (56%) of client survey respondents said a copy of the Charter should be given out with every decision letter.



There was support from the core client group and clients from seldom heard groups to find a balance between including enough detail in the Charter and not making it too long.

## Additional information

There was overall support for the addition of ‘useful information’ relevant to the Charter.



The core client group suggested a **glossary of terms**. They agreed a list of terms and phrases used in the Charter where it would be helpful to see further information to help explain what they mean in practice. For example, ‘Health and Social Care Practitioner’ and ‘Social Security Independent Advocacy Service’.

There was a suggestion to include visual information about **key processes** such as the consultation, re-determination and appeals processes.

Clients who took part in the workshops, survey, and interviews said there should be better links between organisations who provide support.



The core client group agreed a list of **helpful links** which they thought would be useful to include in the Charter. For example, links to benefit checkers and how to get in touch with Social Security Scotland.

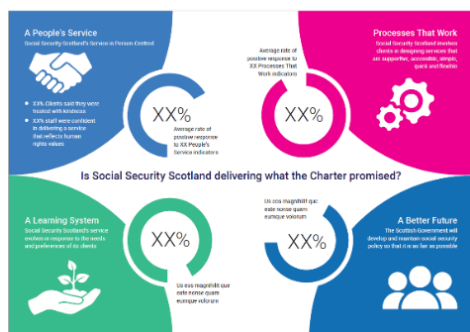


Some said the Charter could have hyperlinks to online information. Some said this would be difficult for paper copies of the Charter.



Some said the information could be in a separate document. Participants said it was important that any additional information should be kept up to date.

# Charter Measurement Framework



In 2019, the [Charter Measurement Framework](#) was created. This is a way to measure how well the commitments in the Charter are being delivered.



Analysts within Social Security Scotland produce the annual framework publication. This team provided an overview of each measure in the first three sections of the framework and their reflections on issues which have affected reporting. Scottish Government policy officials provided input on potential changes to section four of the framework.

A number of areas for potential improvement were identified. A set of criteria for reviewing and updating the framework was developed.



These criteria were discussed by the client core group at workshop four with broad support for the approach.

It is important that the measures in the framework are updated to reflect changes to the Charter. Other proposed revisions include removing duplication, better alignment with available data, and reducing burden on research participants and staff.

## What's next?

The findings of the research have been shared with officials across the Scottish Government and Social Security Scotland.



The Scottish Parliament will consider proposed changes and agree a revised Charter in the first half of 2024.

The Charter design will be refreshed and options for how to include additional information are being developed.

Changes to the Charter Measurement Framework will be made once the revised Charter has been agreed.



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The Scottish Government  
St Andrew's House  
Edinburgh  
EH1 3DG

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