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Social Security Experience Panels: Annual Report 2019



EQUALITY, POVERTY AND SOCIAL SECURITY



Social Security Experience Panels: Annual Report 2019

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Foreword

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

This year's report comes at an exciting point in the Experience Panels programme, showing how the promise of early work has been put into practice in our delivery of benefits. It also looks to the next phase of delivery, working on disability benefits and continuing our commitment by putting people at the heart of social security.

This has been supported by the recruitment of new panel members, and I am particularly encouraged that we are reaching seldom heard groups to ensure that the research includes all of the people who will use our system.

This report is testament to the lived experience of the people of Scotland, so thank you to all those involved for providing your time and sharing your experiences and views. I hope you have seen what you have told us being used to create something better. This will continue to come to life with the benefits to follow.

Learning from the Experience Panels work is an important part of ensuring we continue to improve, and the mid programme review has allowed for reflection on what we have achieved and what we might do differently. This also helps us to consider how we might use what we have learned when planning future engagements.

The Social Security Experience Panels will, happily, continue to be an active and essential part of this work in the coming year as we begin delivery of the disability benefits. The dedication and openness of our panel members in sharing their experiences is fundamental to building a better system for the people of Scotland, and we look forward to hearing more from them.

Shirley-Anne Somerville, Cabinet Secretary for Social Security and Older People

Experience Panels 2019 in Numbers

536
new
Panel
Members



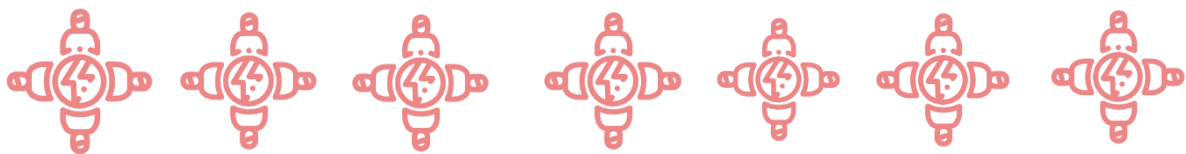
15
surveys

with **4,359+** responses



148+ group and 1 to 1 sessions with **562+** people

7 co-design sessions with a group of **20** people



37
Reports
and visual
summaries



2
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 second 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 has been achieved this year and what is planned for 2020.

2019 has been our second full year of running research with panel members. We have published a large number of reports. We have also undertaken increasingly detailed research with panel members, informing a wide range of decisions about how Social Security Scotland will work.

We reopened recruitment this year to replace panel members who have left or who we have lost touch with. We have welcomed 536 new panel members to the Experience Panels.

We have spent more time working with panel members to test individual components of the service (such as application forms) with panel members. This helps to ensure the service is easy to use and accessible to all.

Finally, we have thought more about how the Experience Panels research links to doing research with Social Security Scotland's own clients with 7 benefits now live. We have also spent more time sharing our findings and approach with others in the Scottish Government and beyond.

This report will give more detail on all of these points.

2019: The Research

Our research programme with panel members this year has covered a wide 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 2019 we have published 37 reports and visual summaries, including on:

- **Our Charter** and the **Charter measurement framework**
- The design of specific **low income** and **carer** benefits and funds, such as **Scottish Welfare Fund**, **Young Carer Grant**, and **Carers Allowance Supplement**.
- The design of **disability** benefits, including experiences of **Attendance Allowance**, **Disability Living Allowance for Children** and **Personal Independence Payment** assessments, and the **names** of the disability benefits.
- A range of different Social Security Scotland processes and policies, such as what **staff** and **buildings** should be like, how **appointments** and **local delivery** should work, the process for **overpayments** and the process for **transferring cases** from DWP to Social Security Scotland.

All reports can be found on our website at <https://www.gov.scot/publications/social-security-experience-panels-index-of-publications/>.

What we have covered

We are now at the mid-point of both the Experience Panels and the social security design process. Because of this, the type of questions we have asked has changed over time. In 2017 and 2018 we tended to ask general questions about people's experiences and desires for the new system. This year our questions have become more specific, as the detail of the processes are developed.

This has led to some challenges where the topics we ask about are complicated or technical, and we need to produce questions that are in straightforward language. We have seen this in our work on Case Transfer (see page 9). Some topics can also be quite sensitive, for example our work to inform how Social Security Scotland responds when clients display unacceptable actions. We chose a survey for this project to allow panel members to respond in their own time and completely anonymously if they wished.

We make sure that panel members have an opportunity to participate to inform all the key decisions across the design of social security, even and especially when topics are complex or sensitive. It is our role as researchers to ensure the questions we take to panel members are clear and relevant. We also ensure that every question we ask is designed to inform a specific decision that has yet to be made.

Social Security Scotland are now delivering a range of benefits¹, and panel members and other citizens have been involved in shaping each of these:

- Best Start Grant and Best Start Foods
- Funeral Support Payment
- Young Carer Grant
- Carer's Allowance Supplement

¹ For more information and to apply see <https://www.mygov.scot/benefits/> or call 0800 182 2222

Beyond one final piece of work on Young Carer Grant, future research to inform continuous improvement of these payments will be done with clients who have received the benefit through Social Security Scotland.

Our work on disability benefits has increased this year as their design gathers pace. While in 2018 we undertook separate work on each disability benefit, this summer we undertook surveys and focus groups on things common to all three – evidence gathering and decision making. The findings from this work will be reported in the coming months.

Spotlight On: Case Transfer

One of our most complex and important topics this year was Case Transfer. For the recurring benefits that are moving from the DWP to Social Security Scotland, there will be a process of moving existing recipients over to Social Security Scotland. Case transfer will be the first contact many people will have with Social Security Scotland.

We made sure that panel members had the chance to have their say on how case transfer will work. We had to work hard with the technical experts to develop questions on case transfer that:

- Used clear and non-technical language.
- Could inform the big decisions on case transfer.

We ran a survey in January looking at panel member's views on the priorities when designing the case transfer process. We also asked about timing of case transfer.

"I would like to see the transfer done as fast as possible, but not if this means there could be issues with payments."

Survey Respondent

Then in February we ran a second survey, and did individual and group interviews. We asked about:

- **Communication** - how and when panel members would want notified about their case transferring, and what information should be available from what sources.
- **Overall process** - what order cases should be transferred in, and what case information should come to Social Security Scotland from DWP.

"This work has been invaluable in the design of the case transfer process. We have ensured that insights from panel members on how they would like to experience case transfer form the basis of the technical decisions that need to be made."

Case Transfer Strategy Lead

2019: How we worked

This section will give a project update on what we have been up to in 2019. It will cover:

- Recruiting and welcoming new panel members
- Reaching seldom heard groups
- Our mid-programme peer review
- Undertaking more user testing
- Working with Client Insights researchers
- Sharing our approach

Recruiting new panel members

Recruitment to the Experience Panels closed in 2017 when the initial recruitment finished. Since that time we lost touch with a number of existing panel members, and others have chosen to leave the panels. There were also some specific groups that we wanted to boost, namely young people, ethnic minorities and people in remote rural and island communities.

So in July this year we reopened recruitment to refresh panel membership. We publicised the recruitment with the help of current panel members, a large number of partner third sector organisations and colleagues working in local areas for Social Security Scotland. We also circulated information about joining on social media. We tailored our approach to different groups, for example running a series of events with ethnic minorities.

As a result of all of this activity, we have now welcomed 536 new panel members, and we will soon set a closing date for the recruitment. We have begun sending our 'About Your Benefits and You' survey to new members to find out more about them. We'll be reporting on the demographics of our new panel members, and of the panel as a whole, in the coming months.

Research with Seldom Heard Groups

We have been aware from the outset that there are a range of sensitive, marginalised and dispersed groups of people in Scotland

who are less visible within or less likely to join a project like the Experience Panels, but who have particular experiences or characteristics that mean they may face barriers when engaging with public services.

This year we launched our programme of seldom heard research, which has five 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
- **Survivors:** survivors of domestic abuse and of childhood abuse.

We have commissioned external experts to conduct two waves of fieldwork with each of these groups over the next two years. This research will examine the particular experiences, needs and views of these groups, to ensure that Social Security in Scotland is as accessible as possible to these groups, and is sensitive to their specific needs.

Our Mid Programme Review

2019 marks the mid-point of the Experience Panels, which will run until all of the relevant benefits are live. We marked the occasion by commissioning a neutral expert from outside of the Scottish Government to review our processes and impact.

The peer reviewer examined a large number of our documents, and conducted a site visit to meet the team. We asked if our data management processes, processes to engage and communicate with panel members, research processes, and governance and stakeholder engagement processes were appropriate for the project, and if the research was impacting on relevant decision making. She found that the answer was yes for all of these and gave detailed and largely positive comments on what she had

found. These included some suggestions for improvement, covering:

- Suggestions for minor clarifications around Data Protection
- Data management suggestions, including suggesting ways to file research materials.
- Suggestions for findings, including looking at how fast they are provided to colleagues, and compiling them in an accessible, searchable format.
- Advice to monitor the size of the internal Working Group within Scottish Government which supports researchers to run the panels.

We have looked at her findings in detail, and are putting in place resource to address all these points. Her overall conclusions can be found on the next page, and the full report is now on our publications page.

User testing work

The work we are doing with panel members is getting ever more specific as we move towards more and more benefits going live. This year there have been increasing opportunities for panel members to get involved in user testing work. This is different from our usual surveys, focus groups and interviews. It involves asking panel members to look at draft parts of a process, for example a piece of an application form, and see how easy to use it is.

This kind of work requires fewer participants than our wider research, and usually needs to be done face to face because of the hands on nature of the process. We still, however, make sure we do all we can to support panel members to take part in these sessions.

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.

Spotlight On: Mid Programme Review

“The work of the EP team is interesting and innovative for its type and I have been impressed by the evidence I have reviewed and learning about the origin and operation of the EP team. It is clear that after an initial period of ‘start up’ the team and its work are in a phase of establishment and with it now have the opportunity to maximise the impact and profile of the work with decision makers and think about what aspects of the programme (and the learning it has done) can feed into an exit strategy and/or overlap with the client insights team.

There are also aspects of panel management and administration that would be worth revisiting if Scot Gov were to adopt a panel as an ongoing research mechanism. For example:

- Whether you want to work with longitudinal data and if so an awareness of how that could change what is disclosive
- Issuing surveys via multiple modes to each panellist as standard and issuing unique survey links to panellists to more likely secure matched data
- Methods and approaches designed to increase response rates

Finally, whilst I appreciate that one aspect of leading work of this type could be requests from others on potential replication, as discussed with the team, this work is successful because of a particular constellation of context and opportunity which isn’t necessarily the case in other places and on other issues. However, I do think it could be useful to focus on the learning the team have achieved that specifies principles and considerations for user involved research in public service design and this could be an area that would be a sensible use of time and investment in sharing the work of the team any wider.”

Client Insights

Our partner researchers in Social Security Scotland have been busy this year establishing a programme of Client and Staff research. Their research is with those who use and deliver Social Security in Scotland, and will track their experiences and drive continuous improvement².

To date this has included establishing feedback surveys for when people phone Social Security Scotland, or when they apply for a benefit online, over the phone and using a paper form.

They are currently preparing for their first All Client Survey, which is due to launch during the first part of 2020. The survey will include an opportunity for clients to volunteer to take part in further research. This will result in a longer term Social Security Scotland version of the Experience Panels. We have worked together closely on this and will use everything we have learned from the Experience Panels to shape how they work with clients.

The existing Experience Panels and client research will therefore overlap for a couple of years. Panel members who are also now clients of Social Security Scotland may wish to participate in both. We will work together to make sure that is straightforward. For example we will avoid scheduling events at the same time, and we will make sure it is clear in invitations which research programme each project is part of.

Sharing what we have found

At this mid-point of the Experience Panels work, we have focused this year on increasing the time we spend communicating with others.

² <https://www.gov.scot/publications/social-security-scotland-overview-client-staff-insights-research-programme-initial-findings/>
<https://www.gov.scot/publications/social-security-scotland-client-staff-insights-research-findings/>
<https://www.gov.scot/publications/social-security-scotland-insights-research-findings-30-june-2019/>

For panel members, this has meant rolling out a newsletter, and adding lunchtime update sessions to our focus group events. Both of these allow us to keep panel members up to date with the Experience Panels programme, and wider developments in the design of Social Security in Scotland.

We have continued to run twice yearly events for stakeholder organisations outside of the Scottish Government to keep them up to date with what we are doing. We have also presented on our work to academic and professional audiences.

And for colleagues within government, as well as our usual dissemination of findings, we have presented on our findings and approach to colleagues across the Scottish Government, and responded to many requests for information about what we do from a range of UK government departments.

On the next page we explore further the reflections we have made on the Experience Panels approach when telling others about the work.

Spotlight On: Reflecting on our Approach

We are sometimes asked about the Experience Panels by others considering beginning similar work. This is what we tell them:

Challenges:

Resourcing: The Experience Panels are very resource intensive, requiring a team of researchers and support staff, and a budget for events and publications.

True accessibility: it can be challenging to provide all adjustments participants require, especially when booking venues across Scotland.

Complexity of social security: Social security is a large and fast paced area, we have to work hard to ensure research is well timed.

Strengths:

Quality and value of ‘lived experience’ input: put simply, panel members give us insights we could not get any other way.

Buy in across social security: Doing the research ourselves, and the fact that it is part of the wider culture of dignity, fairness and respect, means colleagues across social security are seeing the value of the research and using it to inform decisions.

Positive experience for panel members: Participants tell us they enjoy taking part and appreciate the opportunity to shape a system that works for them.

Transferability:

There are many different ways that the Scottish Government can engage members of the public, and the Experience Panels are one model among many. Anyone considering the approach should think carefully about the scale, depth and range their situation requires, and should focus only on questions that have potential to shape decisions. Finally, the administration and logistical requirements for this approach should not be underestimated.

Looking forward to 2020

This section will look at our plans for next year, and longer term the plan for transferring social security research to Social Security Scotland.

In 2020 we will continue our programme of work with panel members. We will continue work on specific benefits, with a new focus on the larger, recurring benefits still to come. This will include work on:

- Disability benefits
- Cold Weather and Winter Fuel Payments
- Carer's Allowance
- Young Carer Grant

We will also continue to cover a range of topics to do with how Social Security works across all benefits. As usual, in early 2020 we will run a set of surveys and focus groups for all panel members around Scotland. We are in the process of finalising topics for these, but they are likely to include:

- Uptake of benefits
- Meeting clients' needs

Our 'About You' survey of panel member demographics and feedback has been later than usual this year, in order to give new panel members a chance to participate. So we will report on this early in 2020.

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.

We will continue to work with our partner researchers in Social Security Scotland to make sure that they build on the work of the Experience Panels, and to make sure our research programmes

complement each other well. Together we will continue to ensure that user voice is at the heart of social security in Scotland.

Conclusion

2019 has been another busy year for the Experience Panels. We would like to thank all panel members for their work this year. To those of you who have been with us from the beginning, we hope you are starting to see evidence of how your views are shaping how social security in Scotland works. We would also like to thank all who have helped us recruit new panel members. And to those new panel members, a very warm welcome to you all, thank you for joining us, and we look forward to working with you.

How to access background or source data

The data collected for this social research publication:

- are available in more detail through Scottish Neighbourhood Statistics
- are available via an alternative route <specify or delete this text>
- may be made available on request, subject to consideration of legal and ethical factors. Please contact SocialSecurityExperience@gov.scot for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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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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