

# Addressing the Skills Gap within Advice Services



## **Final Report**

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12<sup>th</sup> May 2022

## Acknowledgements

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We hope that this piece of work can do justice to your valuable input and contribute to moving forward to a more sustainable and healthy advice sector.

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12<sup>th</sup> May 2022

## Executive Summary

This solution-focused consultation project has been commissioned to build on previous work that has identified a systemic advice skills gap in the advice sector and some of the key challenges that are contributing to this problem.

A range of different perspectives were expressed, that reflected the wide continuum of provision in the advice sector, from advice provided with a holistic 'person-centred', community context through to more specific legal representation.

The immediate and longer-term issues facing the advice sector in terms of delivery are exacerbated by growing levels of demand at a time when the supply of good quality services is fragmented.

Addressing the skills gap requires a focus that is wider than training provision, with a need also to address challenges in recruitment, retention and leadership for holistic workforce development.

Consultation found that issues of diversity are important to address. Smaller and more locally based organisations targeted to specific communities may have less capacity to compete for funding in systems that can often privilege larger organisations. Recognition of the need for funders to accommodate sufficient core funding and longer-term funding is essential to organisational growth and sustainability. Only if advice providers are inherently sustainable can they plan for staff progression through skills development and good employment conditions.

Community-led organisations make an essential contribution to the system, alongside the range of other advice providers. They act as community anchors and have a lot of expertise to share within the system. It is vital that systems are in place for their voices to be heard, with direct contact with funders.

This work has included identifying and investigating examples of practice and opportunity that might usefully be replicated to address some of the challenges identified, by ourselves and others. These are not exhaustive but represent examples identified through consultation.

Apprenticeship schemes, accreditation schemes and the other examples of staff development initiatives contained in this report are a useful contribution to the challenge of recruitment and skills development, as long as it can be ensured that they are representative in who access them and that they can show graduates of the schemes being retained by the sector.

Recruitment is a challenge across the sector, but some organisations are modelling a 'grow our own' approach which shows great potential if systematically supported. To have maximum impact clear progression pathways need to be developed alongside.

The sector needs to explore how best to match the full potential of community-based organisations providing advice as part of holistic support provision by unlocking the specialist knowledge in the sector to support skills development in these often-smaller organisations.

At the same time the sector needs to develop its language about behaviours and practice to give equal space to the wider vocational aspects of community advice work, addressing issues of power imbalance. These organisations include, but are not restricted to, those providing services to Deaf and Disabled People and those from different ethnic minority groups. A shift has begun with several funders towards working with a diverse range of community-led organisations offering advice through an asset-based lens. This is not only about funding diverse organisations but also

meaningfully listening to them to learn from their unique positioning and experience. All parts of the sector should consciously adopt this approach. It is an ethical imperative through the lens of equity of opportunity and also a clear opportunity to reinvigorate the wider more community action or early intervention aspect of advice work.

Retention issues have been identified through desk-based review of existing reports and this work also points to what has been called 'a failed eco system'. Solutions put forward include strong messages on salary levels and structures, career sustainability and wider employment rights access (which are impacted by stability of funding and therefore length of contracts) and wider staff and volunteer well-being issues.

Recent entrants to advice organisations expressed strong passion for the work and its ability to create positive change for communities and wider society. Opportunities to support recent entrants to the sector is vital to maximise their potential contribution and long-term retention. Such opportunities should ensure the best possible representation of a diverse range of people, including those with lived experience of benefiting from advice provision. As the future of the sector, it is imperative going forward that their voices are strong within future plans and initiatives.

There is a strong consensus that required skills for advice encompass knowledge-based training and delivery skills training. This is important for all parts of the sector. Community-based organisations are naturally placed to be comfortable with the holistic and relational aspects of advice giving and legal providers are naturally placed to be comfortable with knowledge-based approaches and procedural skills. However, all practitioners require both knowledge and skills to provide good advice and can help each other with strong mutual learning systems in place.

Training is clearly a key element of an effective pathway, and it is important that it meets needs across the whole continuum of advice services. Overall, the consensus was that there is a need for training provision to be increased across the sector. The value of this will be limited without the development of clear pathways for skills development and recognition of progress, in areas of advice (notably social welfare law) where this is not already in place.

Formal training is not the only response necessary to meet learning and development needs across the pathway. Good supervision and peer learning is an essential tool for supported ongoing learning. Some funders already encourage this within funding arrangements. Other funders can learn from this.

Issues of leadership also need to be addressed. Effective succession planning stems from an organisational culture of 'growth mindset' and being open and transparent to learning from everyone within the organisation. It also relies on effective volunteer and staff development at all levels of hierarchies within organisations. Development of future leaders is essential to the health and sustainability of the sector as a whole.

This piece of work can only be the start of investigating and addressing the skills gap. The actions for further work identified in this report will contribute to further learning. Overarching recommendations from the work are outlined overleaf.

## Recommendations

### Recommendations for strengthening sector infrastructure

That funders consider development, expansion or longer-term support for successful pilots and projects such as those identified in this report.

That further work is undertaken to identify salary benchmarking and address salary and wider employment conditions in contracts.

That funders consider an audit of funding across the London Advice Sector that includes Local Authority funding.

That funders and membership bodies consider resourcing the development of a sector wide strategy based on inclusive collaboration.

That funders and advice membership bodies work together to develop skills development pathways in housing, welfare rights and employment advice.

That funders explore further with the GLA how their work on developing effective training pathways can be applied across the advice sector.

That funders and providers collaborate on the development of a pooled system of supervision and/or peer review.

That funders and membership organisations consider further the role of leadership and address gaps in succession planning in the sector, with the context of a collectively produced workforce development strategy.

That the potential of expanding apprenticeship schemes, NVQ programmes and post qualification CPD is further identified and addressed.

That meaningful opportunities for cross sector learning are maximised and pro-actively seek the view of smaller organisations and front-line staff.

That the potential of wider access to Mental Health First Aid and other wellbeing-related initiatives are considered and supported.

That a further focused piece of work is undertaken to identify the benefits and barriers of a 'grow your own' approach. Specifics of any future investigation or pilot should be co-produced with community-based organisations. Any initiatives could usefully be informed by evaluation of existing approaches identified in this report.

That funder consider resource to further develop capacity building support specifically to organisations targeted at specific minority groups and Deaf and Disabled People's organisations to maximise their contribution to the sector.

That funders consider resourcing a dedicated branding and communications initiative, building on clearer identification within the sector of its collective strategic direction.

## Recommendations for funder practice

That funders consider core funding elements in all contracts to encourage long term sustainability planning and opportunity.

That funders further investigate pooling or co-ordination between themselves, across Local Authority areas, across diverse organisations and across the continuum of advice provision.

That funders ensure that smaller organisations have equitable access to information about funding opportunities and appropriate support to apply.

That funders arrange for payment/reimbursement systems to enable smaller organisations to participate meaningfully in consultations and strategic development.

That longer term funding is prioritised to ensure providers have the best opportunities to give longer term contracts that qualify for better employment conditions and benefits.

That funders encourage providers to actively address wellbeing issues through their specifications and contracts.

Funders to include in specifications and contracts additional resourcing for providers to make reasonable adjustments for deaf and disabled people to undertake advice roles and training.

Funders to ensure sufficient budget allocation for providers to disseminate learning from pilots and other projects.

## Recommendations for advice sector delivery, management and co-ordination

That advice sector leaders work together with delivery providers to revitalise messaging about the core values of the sector, linking into other drivers and movements for social change.

That advice sector leaders work with funders to further develop and facilitate meaningful dialogue that is inclusive of all parts of the sector and all parts of the workforce.'

That membership bodies work with funders to ensure regular networking opportunities, building on those already funded and established, to share learning on pilot or project specific data.

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## Glossary

**Advice/advice services:** organisations which help members of the public with limited means deal with matters of daily life for which the law defines rights, entitlements and protections.

**AQS:** Advice Quality Standards. A quality assurance mark which can be awarded to organisations that give advice to members of the public on legal issues. Organisations are audited every two years and have to demonstrate that they met a series of requirements which include that they are accessible, effectively managed and employ staff with the skills and knowledge to meet client need.

**BAME:** In this report, the acronym 'BAME' is used to refer to people from the Black, Asian and Minority Ethnic communities which together comprise over 13% of the UK population. Whilst the term is criticised by some as reductionist and exclusory, it is a term which is widely used and understood by the advice sector and our stakeholders.

**Generalist advice:** a term used to describe advice provision across a range of areas of social welfare law, but which does not require a high level of legal knowledge (in contrast to specialist advice see below). Generalist advice often takes place in smaller, community-facing organisations and/or within a wider holistic support offer. It can incorporate triage and/or a more preventative or community action approach.

**LASPO:** Legal Aid, Sentencing and Punishment of Offenders Act 2012. This Act brought in significant changes to eligibility for legal aid, essentially restricting eligibility in some key areas of social welfare law.

**OISC:** Office of the Immigration Services Commissioner which provides a statutory regulatory framework for Immigration Advice.

**SQE:** Solicitors Qualifying Examination. Assessment route for those seeking to become a solicitor in England and Wales. It allows for a vocational approach to qualification.

**Specialist advice:** This is a term which traditionally denotes knowledge, experience and ability to give highly technical advice and support in specified areas of law. This can sometimes involve representation in a court or tribunal in a complex area of social welfare law. In this report the term specialist advice is used to denote an area of legal expertise in its traditional sense.

**Targeted advice:** The term used in this report to describe organisations working with specific groups (for example, ethnic or faith communities, deaf and disabled people) where an in-depth knowledge of the particular problems within communities requires expert advice skills and knowledge.

# 1. Introduction

## 1.1 About the project team

The team that has worked on this project are Dr Anne Rathbone, Mark Foster and Patrick Nyikavaranda. As a team we have experience of research and practice in advice related issues as well as of wider social research and service and community development.

## 1.2 The skills gap in the advice sector

An immediate and recurring challenge identified by the advice sector is the difficulty in developing an effective and sustainable career pathway which attracts and builds the workforce. There is a recognition of a lack of capacity and structure within the profession to recognise, reward and grow an effective and dynamic workforce.

Research and anecdotal evidence illustrate a range of problems the sector faces in achieving this aim<sup>1</sup>. These include, but are no means limited to

- a lack of adequate sustainable funding overall,
- limited statutory recognition and capacity or structural support,
- a reducing number of advice providers<sup>2</sup>;
- a fragmented and increasingly competitive funding environment,
- a problem of scalability when a good idea is developed and
- an image/marketing problem.

All of these issues require solutions that meet the needs of a vastly diverse sector in terms of the type of advice offer, the range of volunteers and paid staff delivering the offer and the people in communities accessing the offer.

The age profile of those working in the sector appears to be getting older, and younger people are not joining the sector (or at least not staying in the sector) in sufficient numbers for it to be sustainable. Lack of data sharing hampers clear understanding of the extent of this problem but it was clearly reported to us when we interviewed people in the sector

Further particular challenges and opportunities are presented by both BREXIT and the coronavirus pandemic with reductions in the existing workforce and any opportunities for new entrants into it.

At the same time research identifies a growing demand and need for advice as social and economic inequalities increase

Specifically, key areas that have been highlighted by this work include:

- Low pay levels in advice agencies and a reliance on a mix of part-time short-term contract work. Volunteers provide the core of a number of services in the sector.

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<sup>1</sup> Advising Londoners report July 2020 for example illustrated growing complexity of issues in London while noting difficulties in maintaining a stable workforce

<sup>2</sup> Jo Wilding Droughts and Desserts report for a detailed examination of the market and supply in Immigration Advice for example

- Contracts or grants underfunding projects, meaning often staff must work unpaid hours, especially in trauma-informed advice.
- Lack of career progression structures and development pathways through to senior leadership positions. Lack of support to attain overall organisation excellence in the sector.
- The need to prioritise development (through organisational focus, inclusion in charging models and recognition by funders) of key 'support' functions such as finance, technology and project management.
- Opportunities and barriers to new business models in the sector such as Community Interest Companies or Social Enterprises.
- Difficulty in recruiting entry level staff due to young people lacking awareness of the sector or what its function is.
- Funding does not cover the cost of running an organisation or of working towards systemic change
- Perception and marketing of the sector including addressing the need to address how they can grow local good practice to change the environment of the sector and make it more attractive as a career option selling it as a progressive agent for change?
- System is historical and sporadic with regional disparity of provision and a lack of commonality, collective ownership or economies of scale.

A presentation of findings from the Advising Londoners' research<sup>3</sup> was presented to the London Funders Advice Network on 15<sup>th</sup> January 2020. This network is a task group made up of advice funders and sector representatives, established to look into skills gaps in more detail and how they could be best addressed. The group met between April and July 2021 looking at good practice, new opportunities, and ideas. The group decided to commission practical research to explore these opportunities through online research and consultation with a range of stakeholders. This was with a view to developing a short to medium term action plan.

### 1.3 Purpose of this report

Whilst previous reports have highlighted longer term systemic problems and challenges facing the sector in terms of the skills gap, there is a need to focus on immediate solutions.

The primary purpose of this report, therefore, is

- i) Briefly summarise current issues regarding the skills gap as identified in our own stakeholder consultation and other reports
- ii) Present a range of illustrations of how the skills gap is being addressed. This is with a view to funders being able to identify initiatives that may be:
  - Adaptable to different areas of advice provision (see below 2.2)
  - Replicable across London or even wider
  - Expandable to meet levels or types of demand that do not appear to be currently met.
- iii) To identify other specific opportunities for development in relation to addressing the skills gap within the context of progression pathways.

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<sup>3</sup> Commissioned by the Greater London Authority July 2020

The findings will consider the fundamental need for longer term developments to address deeper systemic change including the issues of equity of access to skills development within the sector (see 2.4; 5.2). These issues have been raised as underpinning issues that must be addressed in order for specific skills development initiatives to have meaningful and long-term impact within the system.

The report, therefore, aims to capture some of the issues and to highlight opportunities for development and longer-term sustainability of a healthy advice sector. (see Section 5).

There are a diverse range of advice service providers a sector and other stakeholders. Many have brought a different lens to the challenges facing the sector. The report will highlight key areas where diverse perspectives bring a range of views across stakeholders. It is intended that this report represents the start of a process of learning about the skills gap facing the advice sector and therefore not intended to be a comprehensive review.

Comments or questions about this report can be forwarded to the commissioners or the project team by emailing Nezahat Cihan ([Nezahat@lst.org.uk](mailto:Nezahat@lst.org.uk)).

#### 1.4 Overview of activity

We have collected a rich variety of material through desk research, an online survey, staff focus group and 33 interviews, taking care to achieve the best possible representation of organisations across the sector. This includes smaller organisations at the community-facing end of the advice sector (including organisations targeted to the needs of BAME groups and Deaf and Disabled People) as well as people in strategic and senior roles in larger organisations and membership organisations.

The consultation with Local Authorities has been limited and we recognise that their engagement is essential in any future work.

We believed it important to include the voice of front-line staff, especially those recently working in the sector. We therefore held a focus group with younger people on an apprenticeship scheme hosted by a community-based organisation. Key findings from this group are reported in Section 3. Barriers and Enablers. The focus group is written up in full in Appendix A. A list of all those consulted for the work is attached as Appendix B.

We also consulted with a representative of London Youth who has a long history in the youth sector. This was to explore whether there might be learning to be gained from the youth sector, which has faced similar challenges regarding skills gaps. Again, learning has been incorporated alongside findings from the main consultation. A full write up is attached as Appendix C.

## 2. Addressing the skills gap: current context and examples of solutions

### 2.1 Taking a pathways approach to a skilled advice workforce

A skilled advice workforce does not merely rely on training but on effective pathways through which individuals can progress to meet their unique needs and career aspirations. Career progression pathways will be different for different individuals, given that people come into the sector from all different routes. Overall, however, the sector must be able to recruit appropriate staff, to offer them suitable and accessible opportunities for skills and career development.

Skills development relates to qualification and skills pathways through which staff can improve their technical and relational capacity to provide advice at progressive levels of complexity. Wider pathway issues also need to address what staff need in order to stay in the sector and to progress to supervision, management and leadership roles if they so wish. Visible, well presented and structured pathway options are therefore vital to maximise recruitment, retention and the impact of specific skills development initiatives.

Smaller, community-based organisations highlighted the importance of this need for overall pathways, both in terms of knowledge and skills development and in terms of wider career progression.

### 2.2 An overview of the current situation for different areas of advice

The term 'advice' in itself contested as are categorisation of advice as 'generic' or 'specialist'. There are several definitions of advice, such as the one offered by the AQS and outlined in Appendix D. As a more general rule of thumb, advice is the practice which helps people with matters of daily life for which the law defines rights, entitlements and protections.

Many stakeholders we consulted expressed concern that traditional definitions of advice did not adequately value the role of triage and entry level advice, especially when delivered as part of a holistic offer. For this reason, we have offered our own thoughts on how advice definitions relate to the community-facing context, with a view to stimulating further discussion. This has been checked back with the respective stakeholders to ensure it reflects their stated concerns and is attached as Appendix E. This includes an overview of the skills and training required to be an advice worker.

Most areas of advice are unregulated, excepting immigration and debt advice. These latter require services providing such advice to comply with the standards of the relevant regulatory body. Some advice practitioners may be subject to statutory regulation, for example those providing immigration and debt advice and qualified lawyers who are practicing as such.

Within different types of advice, there are distinct regulatory frameworks and qualification milestones (or lack of such). Where there are regulatory frameworks in place, they are likely to include a reflection of levels and types of skills and knowledge required. Table 1 overleaf gives an overview of recognised levels of advice and relevant regulation for different areas of advice.

**Table 1: overview of recognised levels of advice and relevant regulation (where they exist) for different areas of advice**

Type of advice	Regulated by	Recognised levels of advice	Quality assurance mechanisms
Immigration	Office of the Immigration Standards Commission (OISC)	Level 1 – Advice and Assistance  Level 2 – Casework  Level 3 – Advocacy and Representation	Strict criteria about who can provide which level of advice  Advisors must prove competence to advise at each level  Services must ensure auditable standards to guarantee quality
Debt	Financial Conduct Authority	Unregulated activities – guidance on options and information  Regulated activities (FCA) – any engagement with credit agencies on behalf of a client.	The FCA has a range of tools at its disposal to seek to enforce any non - compliance
Welfare Benefits Housing Employment Education	N/A	Ability to interpret Welfare Rights Law and guidance to inform and guide clients.  General help with case work –presenting a range of options, advocate and represent clients with other agencies  Representation of clients including detailed argument and court or tribunal representation	

The overview in Table 1 above highlights the lack of distinct qualification requirements for much advice work i.e., Welfare Benefits, Housing, Employment and Education. Linked to this is the absence of clear pathways for these areas of advice, together with what many stakeholders we consulted viewed as an underdeveloped sense of advice taking place within the context of holistic provision. This is discussed in more detail in 2.4.

### 2.3 Recruitment and entry points

Previous reports have highlighted a lack of new entrants or other applicants to advice posts. Our consultation indicates that this continues to be a broad area of concern.

AdviceUK website (<http://www.jobsinadvice.org.uk>) provides a job search facility for members. Rightsnet (<http://www.rightsnet.org.uk/jobs>) provide a similar function. Although these are useful in bringing opportunities together, they cannot in themselves address lack of suitably qualified candidates for advice roles.

For more specialist and legal roles, the impact of Legal Aid, Sentencing and Punishment of Offenders Act (LASPO) (with a knock-on effect in being able to train staff suitable for experienced roles) appears is particularly noted by the sector. The loss of these experienced practitioners in the sector and the sector's struggles to replace them has had a particularly significant impact. As noted in the report 'Droughts and Deserts'<sup>4</sup>, a key issue in immigration advice is the mobility of solicitors from one organisation to another through recruitment, but without increasing the overall workforce supply. This is recognised as a key challenge in other areas of the sector. Stakeholders we consulted reported significant problems, for example with recruiting trained Welfare Rights Advisers.

Volunteering, apprenticeships, internships and work experience are major enablers to recruitment. They also offer opportunities for skills and knowledge development that can enable people to meet recruitment criteria for paid or higher-level roles. Our staff focus group highlighted the importance of volunteering as an entry point to advice work whilst at the same time noting the need to develop paid opportunities to ensure an equitable approach (see 3).

Key to understanding recruitment issues and their link to retention is that there are strong indications from our consultation of imbalances and disconnects between different parts of the sector which impact on recruitment. On the one hand, there are some parts of the sector with more stable infrastructure and skills capacity but limited recruitment pools. On the other hand, (often smaller) community-based organisations can have recruitment opportunities through their strong community connections but often not the organisational capacity or formal skills development opportunities to develop and retain staff over the longer term.

A key question is therefore how to bridge that divide and mobilise the skills of the existing skilled workforce to optimise the benefits and sustainability of grassroots community recruitment, without establishing a system that simply relies on communities as feeders but then drains community organisations of their staff, once upskilled.

Overleaf are some examples of solutions to recruitment and entry challenges.

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<sup>4</sup> Droughts and Deserts. Wilding April 2019

## Examples of recruitment and entry solutions

### *Volunteering Infrastructure*

Citizens Advice provide a notably well-developed access route to advice work through volunteering. As a national organisation, Citizens Advice provide a structured system of support to their local independent members (see [Volunteering with Citizens Advice - Citizens Advice](#) ).

Name of project/agency	Citizens Advice (CA)
Description of model	<p>CA benefit from being able to offer a variety of volunteering roles. Advice specific roles include working in the agency itself or in the Witness Service. Volunteers can also begin by working in office-based roles such as administration or customer service, research and campaigning, communications or fundraising. They may then move to direct advice-giving roles if they wish.</p> <p>A highly structured competency based internal training programme is available to all volunteers who can progress their knowledge and skills to provide advice at increasingly technical levels.</p> <p>Detailed descriptions of volunteering opportunities are promoted via the CA website (see <a href="#">Volunteering with Citizens Advice</a>) which also includes FAQs, search for opportunities by location and a detailed inclusion statement.</p>
Profiles of people that are recruited	<p>Volunteers come from a range of ages and backgrounds with varied life experiences.</p> <p>Strong history of attracting people with higher education levels, professional backgrounds in law or other disciplines relevant to advice.</p>
Any evidence of reaching qualification or recognised skills levels?	<p>Yes. CA have an internal learning platform (Skillbook) through which volunteers and paid staff can work. The levels cover training relevant to advisor, supervisor and leadership. Specific to advice is the Advisor Learning Programme. Competency levels gained are internally recognised and documented through the Learning and Assessment Record (LAR). Training on debt advice is externally accredited.</p>
Information on costs	<p>The Skillbook platform is based on licence costs which equate to approximately £27.00 per person/year (based on the full staff and volunteer base). CA can upload unlimited content to the platform. CA runs on an average £200 per live online learning session which includes all of the preparation, set up, platform etc.</p>
Barriers	None identified
Enablers	<p>CA benefits from being a recognised provider of advice with a high national profile. It is therefore well-known and an obvious choice for people looking to volunteer for community benefit.</p> <p>Communication regarding volunteering opportunities is strong (see above).</p> <p>Increasing use of online training maximises accessibility and range of course options.</p>
Where the funding comes from. Is it ringfenced?	<p>Recruitment of volunteers incorporated into the overall running costs of each local agency.</p> <p>Training is provided by internal employees.</p>



*‘Growing our own’ advice staff – an amalgamated example*

The concept of ‘growing our own’ advice staff as a way of addressing challenges in recruiting suitably training and experienced staff was found across our consultation and particularly in community-based, targeted agencies. The following template provides a composite illustration of this approach from the experiences of the DayMer Turkish and Kurdish Community Centre, Eastern European Resource Centre (EERC), Money A + E and Tower Hamlets Community Advice Network.

Name of project/agency	EERC DayMer Community Centre Money A + E Tower Hamlets Community Advice Network
Description of model	EERC, Money A + E and others have developed approaches which seek to give pathway development opportunities directly to those in communities that they work with. These may or may not be people with lived experience of having needed advice themselves. These opportunities represent a progressive means of developing and recruiting into the workforce. They utilise where possible external frameworks and support. For example, EERC have utilised the Refugee Action capacity training framework in Immigration advice. Tower Hamlets Community Advice Network (through for example, the Tower Hamlets Trainee Advice Project <sup>5</sup> ) works with AdviceUK to support staff and volunteers to attain NVQ Level 3 in advice and guidance. The approach aims for community members to be upskilled to offer best practice advice and information in a given area of social welfare law, within the context of a holistic support approach. This approach is often used with volunteers who are then better able to apply for paid roles when they become available. This helps to address recruitment challenges as well as enabling a workforce that represents the community they serve.
Profiles of people that are recruited	Members of local communities.  People with lived experience of facing complex life situations and problems where social welfare law is an important tool to ensure access to rights and justice.
Any evidence of reaching qualification or recognised skills levels?	Money A + E offer an accredited framework based on competency and knowledge levels in debt advice. Other organisations may be able to access their volunteers to accredited training depending on availability and resources.
Information on costs	No specific information identified. The approach within EERC and DayMer is largely absorbed in unpaid management time (see barriers).
Barriers	Without specific funding for this approach, the amount that can be achieved is limited due to management capacity to develop and sustain.  Lack of clear, joined up pathways may produce inefficiencies due to lack of clarity about recognised levels of competence for some areas of advice e.g., employment, housing, welfare rights.
Enablers	Strong links with local communities. Management passion and commitment to local communities.  People with lived experience are motivated by, and benefit from, opportunities to make a positive contribution in their communities and develop their skills and career paths.
Where the funding comes from. Is funding ring-fenced?	Costs absorbed within the service model.

<sup>5</sup> <https://thcan.org.uk/volunteering/>

There is also a historical example of a 'grow our own' paid internship scheme at the Cardinal Hume Centre in Westminster. This aimed to skill up existing staff in both Welfare Rights and Immigration knowledge and skills. It was implemented to address a lack of applications in these roles and to give opportunity to existing staff members. We did not find any current internship models like this operating.

## 2.4 Training

Provision of training, and access to it, was highlighted as a key concern in consultation. This was linked to a widespread (although not universal) concern among stakeholders we consulted across the sector regarding an overall decline in standards in the sector. Some felt that this had worsened as the sector has become more fragmented and unstable, particularly post Legal Aid, Sentencing and Punishment of Offenders Act 2012 (LASPO). Concern was also expressed by some that some areas of social welfare law had a more consistent level of coverage than others. For example, some stakeholders consulted expressed the view that employment advice was less well-resourced in terms of training than social welfare law, although we do not have sufficient information to confirm this. However, it highlights the need for the sector to consider strategically how to allocate training resources across different areas of advice.

### Type of training need

There was a strong consensus across the stakeholders we consulted that the required skills for advice encompass knowledge-based training and delivery skills training. This is important for all parts of the sector. Staff working at every point of the advice continuum require training that provides accurate advice-related knowledge (often legal knowledge) whilst also being accessible to people from different educational backgrounds.

Generally speaking, stakeholders working in organisations that focused on the more technical, legal end of advice provision recognised that relational, soft skills were important for their staff or members to develop. Smaller community-based organisations highlighted the training needs of their workforce as being primarily acquisition and application of technical knowledge and the importance of maintaining appropriate boundaries in the giving of advice. This included routes to qualification where this was possible.

### Level of training need against available provision

Our consultation found some differences in stakeholder views about the need for more training as a priority for development. Most stakeholders reported that training provision was inadequate at all parts of the sector.

Most stakeholders in the specialist/legal parts of the sector reported that training provision across the sector was inadequately funded to meet the skills development needs of their workforces. It is worth noting here that larger organisations such as Citizens Advice and membership organisations such as the Law Centre Network have been successful in developing their own strong training offers accessible to their members (see below).

Conversely, some stakeholders representing those providing more 'specialist' advice felt that there was a good supply of training in technical and knowledge-based aspects of advice but that more needed to be done to ensure that smaller, more local community organisations could access it in meaningful ways.

Most stakeholders from smaller, community-based organisations agreed that the current focus of skills development in the sector is disproportionately aimed at the ‘specialist part of the sector’ and does not sufficiently consider the development needs of staff with a diversity of experience and prior education, particularly those working at a community level. This is important because most smaller organisations do not have the capacity to provide training themselves and rely on other sources. This is discussed further below in Type of training need.

Some more established second tier leaders also recognised this trend:

*“I consider that the key issue is not training itself but the lack of opportunity and development within the pathway particularly at the grassroots level. The market seems reasonably robust in terms of training to the specialist end of the profession, and it is not dealing with the skills gap.”* (Advice Second Tier Manager).

A specific issue raised by several stakeholders we consulted was that training and wider skills development offers need to as much as possible to be flexible to meet the needs of people with lived experience of disadvantage and complex barriers. Whilst they have potentially a lot to offer the advice sector, they may need training offers that address barriers to engagement. These could be physically disabling barriers (see 5.2) or may be about making skills development accessible to those without prior qualifications or further education experience. One implication of this is that any skills development/progression models that are developed or expanded need to ensure maximum accessibility and relevance through inclusive collaborative planning.

#### Training as part of a recognised competency-based pathway

For training to be most effective, it needs to be provided as part of a structured offer through which it is clear when any one person is sufficiently trained to advise in any given area of advice and at which level of advice. This particularly applies to aspects of Social Welfare advice, such as Housing, Welfare Rights and Employment.

Many stakeholders from across the continuum of advice provision pointed out that, whilst there could be more training across the sector, overall, this was not as urgent a priority as the need to develop clear, recognised and accredited pathways for skills and career development. Linked to this, we found a consensus that the landscape of initiatives that address skills development is fragmented and there is not a common understanding of how to develop and shape a particular skills development pathway in many areas of social welfare law. It is important that the more holistic, creative skills needed to be an effective community advice worker are adequately reflected in any emerging training pathways.

Although not specifically focused on training provision, this is an important finding in relation to the skills gap. There was a strong consensus that tiered pathways must underpin any specific training offers to be effective in addressing the skills gap in the medium term, through systems change.

*“Other areas of our work - like welfare rights advice - do not have such clear external frameworks. There are lots of courses available but they are all one offs and expensive. It is difficult to know what collection of courses people need and when. It is much less cost effective and efficient to manage this way, and it is harder to assure quality.”* (Advice Service Manager)

#### Issues regarding provision

Whilst there are many good examples of training being offered, there is less clarity about whether it is being offered in the right way, to all the people it should be reaching and at the right time in their career pathways. Specifically, there is the question of whether current training offers are meeting

the inclusion and relevance needs of the diverse workforce that the targeted and community-led organisations (such as BAME and disability focused organisations and groups) represent (see above).

Most larger organisations offer training ‘internally’ (see above) but their training aimed at their partner organisations is not a uniform offer, being often negotiated and delivered at a local level.

Stakeholders from or representing smaller, community organisations described their workforce as ‘having community connection and empathy in their blood’ and naturally placed to share their knowledge and skills in the more relational, holistic aspects of advice with other parts of the sector. Legal providers are well-placed to be comfortable with knowledge-based approaches and procedural skills but concern was expressed about a disconnect:

*“My experience is there was a bridge between beginners and experts and that may be less so now as people may be less connected. The Sector does not brilliantly represent the community it advises, in terms of community and diversity. I think what is needed is a more formalised or clearer pathway to help here.”* (Representative of Welfare Rights Focused Organisation).

#### Specific barriers to accessing training

We unable to identify specific profiles of who was accessing different training offers we investigated. However, stakeholders we consulted in community organisations consistently told us that cost and staff time were the key barriers to access.

The other key barrier identified was cost. This is relevant in terms of the cost of providing training, which can be resource intensive. It also applies in terms of cost to organisations sending their workforce on training, in terms of staff time and lack of identified skills development budgets. For sustainability of impact on the whole system, rather than the individual, training demands ongoing resourcing rather than short term investment.

#### Examples of training solutions

As noted above, training provision can range from skills development initiatives aimed at developing legal knowledge capacity to initiatives aimed at developing place-based and community-focused skills capacity. Some examples of training include, but are not limited to, those described overleaf.

AdviceUK NVQ Programme

Name of project/agency	AdviceUK – RQF (NVQ) Programme
Model of delivery	<p>AdviceUK is approved by City and Guilds as an Assessment Centre for NVQ Level 3 Certificates and NVQ Level 4 Diplomas in Advice and Guidance, Ofqual regulated Qualifications.</p> <p>Volunteers and paid staff providing advice can use this route to have their prior training (whether accredited or not) and work-based experience recognised through a widely recognised qualification. Competence based qualifications assess skills and knowledge required in a job at a particular level.</p> <p>The process involves work- based assessment by matching the required learning outcomes and assessment criteria set out in the standards laid down for the NVQ. Evidence is accumulated by the advice worker by demonstrating each of these components as well as writing about what they do backed up by work records and witness testimony.</p>
Levels of training provided	<p>RQF (NVQ) Level 3 – Certificate in Advice and Guidance</p> <p>RQF (NVQ) Level 4 – Diploma in Advice and Guidance</p>
Profiles of people that go through the training	<p>There is no precise information on demographic or other profiles of access. However, access figures show that the majority are women, reflecting the Advice Sector as a whole. Many are already graduates but require a qualification specific to advice work that shows transferable skills.</p> <p>However, most of the those accessing NVQ assessment via AdviceUK are from the AdviceUK membership. This includes many community-based organisations, including those that are targeted at specific groups in the community.</p> <p>Level 3 Certificate in Advice and Guidance is targeted specifically to advisors who are working face to face with clients to provide advice services. These may include case work, action planning with clients and referral to other agencies.</p> <p>Level 4 Diploma in Advice and Guidance is targeted at senior or specialist advisers, organisational co-ordinators or managers who have some client contact but whose role may also include networking, supervision and support for other staff and volunteers, planning, evaluation of provision and development. Networking on behalf of the organisation is a mandatory requirement to achieve this level.</p> <p>Based on current figures, over 100 learners are undertaking either Level 3 or 4 at any one time.</p> <p>This is currently constrained by AdviceUK capacity but experience of AdviceUK suggests that more learners could be accommodated with funding to support expansion of support capacity that could then be financially sustainable once established.</p>
What qualifications, if any, are provided	<p>RQF Level 3 awarded by City and Guilds.</p> <p>RQF Level 4 awarded by City and Guilds.</p>

AdviceUK NVQ Programme (continued from previous page)

Name of project/agency	AdviceUK – RQF (NVQ) Programme												
Information on costs	<p>Costs are usually met by the employer as follows:</p> <table border="1" data-bbox="464 376 1385 600"> <thead> <tr> <th>Level</th> <th>Members</th> <th>Non-Members (Voluntary Sector)</th> <th>All others (Statutory / Commercial)</th> </tr> </thead> <tbody> <tr> <td>Level 3</td> <td>£1,300</td> <td>£1,580</td> <td>£1,930</td> </tr> <tr> <td>Level 4</td> <td>£1,600</td> <td>£1,945</td> <td>£2,340</td> </tr> </tbody> </table>	Level	Members	Non-Members (Voluntary Sector)	All others (Statutory / Commercial)	Level 3	£1,300	£1,580	£1,930	Level 4	£1,600	£1,945	£2,340
Level	Members	Non-Members (Voluntary Sector)	All others (Statutory / Commercial)										
Level 3	£1,300	£1,580	£1,930										
Level 4	£1,600	£1,945	£2,340										
Barriers to attending training	<p>The qualification route is designed to keep barriers to a minimum</p> <p>As the RQF is a work-based qualification, this enables access by staff and volunteers for whom attending regular and face to face training might be a barrier and who work in organisations that may struggle to release them for large amounts of training time.</p> <p>The units for both Level 3 and 4 require some written work to be submitted as part of a portfolio demonstrating knowledge as well as experience, however professional discussion can be used as an assessment method as well if required.</p> <p>The process for each level usually takes between 9 and 12 months to complete, depending on the learner's individual needs and capacity.</p>												
Where the funding comes from	Employers usually sponsor members of staff but individuals are often self-funding. Sometimes individuals can apply for local grants that will cover the NVQ costs.												
Whether the funding is ring-fenced	Expansion of AdviceUK capacity would necessitate some initial funding to get to the point where the costs can be covered from fees.												

Citizens Advice Training

Name of project/agency	Citizens Advice (CA)
Model of delivery	<p>CA provide a wide range of training for their volunteers and staff. This ranges from knowledge-based training to training on the practices and process of advice work.</p> <p>The former includes (but is not limited to) advice knowledge related to:</p> <ul style="list-style-type: none"> <li>• Debt.</li> <li>• Benefits (annually updated).</li> <li>• Immigration</li> <li>• Family and personal.</li> <li>• Energy</li> <li>• Some aspects of housing.</li> </ul> <p>The latter focuses on relational, soft skills, for example:</p> <ul style="list-style-type: none"> <li>• Interviewing skills.</li> <li>• Benefit of a holistic approach to advice.</li> <li>• Importance of non-judgemental approaches for the best outcomes.</li> <li>• Working across different channels e.g., face to face, phone and webchat.</li> </ul> <p>CA link this people-focused training directly to staff wellbeing and resilience. It helps staff to feel they are making a difference in their approach in the context of working with people in dire and complex circumstances.</p> <p>Over the past two years, CA have actively reviewed and updated all learning content to ensure it is aligned to the current needs of their learners. Changes have included improvements to existing format and content as well as creation of additional content, including:</p> <ul style="list-style-type: none"> <li>• Updated webchat and telephony content.</li> <li>• New content on energy-related advice.</li> <li>• Changes to employment and immigration advice related content (in line with changes due to Brexit).</li> </ul> <p>Training is provided through the Skillbook platform. Most of this is dedicated to internal learners. There is also a separate area of Skillbook that is focussed on energy related learning as part of a distinct project. The whole learning programme is part created by CA and part curated from external sources. All the learning content is based on training needs analysis and therefore bespoke to learners' ongoing needs. Other sources of content include that from LinkedIn learning, Ted, YouTube and other sources deemed reputable and reliable by quality assurance teams within CA.</p> <p>Learning opportunities are regularly promoted through the monthly newsletter which goes out across the organisation. This is complemented by monthly Q&amp;A sessions where current and upcoming learning opportunities are shared. A Facebook-based peer to peer support page is also available to all volunteers and staff. This has enhanced the profile of the learning offer and is an opportunity for learning leads to listen to ongoing needs of learners in terms of focus and content. Local learning leads co-create learning content with national staff.</p> <p>CA are actively considering how they may be able to offer their learning platform to external learners, wider than for energy related learning.</p>

*Citizens Advice Training (continued from previous page)*

Name of project/agency	Citizens Advice (CA)
Levels of training provided	Learning content is available at Advisor, Supervisor and Leadership levels.
Profiles of people that go through the training	<p>There is no specific information on demographic or other profiles of access.</p> <p>On average, more than 7,000 staff/volunteers each month access the digital learning platform.</p> <p>Each month, more than 200 places are filled for live online learning sessions.</p> <p>The CA Adviser Learning Programme (ALP) is used by all local offices.</p>
What qualifications, if any, are provided	<p>Training on debt advice is externally accredited.</p> <p>There is internal recognition (rather than qualification) for learners as they undertake training at different levels of competence, knowledge and skill. This is documented through the Learning and Assessment Record (LAR). The Local Learning Lead and the learner work together to identify required training for their role. Observations of competence lead to sign off of the demonstration of competence at that level of learning.</p> <p>The LAR also contains a list of any Recognised Prior Learning (RPL) which is used when a trainee joins with a foundation/advanced skill in specific areas e.g., in the case of a qualified lawyer or solicitor.</p> <p>CA are currently reviewing their competency frameworks and will be mapping learning across to them. This may lead to accreditation of content and materials other than that for debt advice training.</p>
Information on costs	The Skillbook platform is based on licence costs which equate to approximately £27.00/person/year (based on our full staff and volunteer base). This enables unlimited amounts of content to the online learning platform. Estimated costs for one online learning session are estimated at an average £200. This includes preparation, set up, platform and delivery.
Barriers to attending training	<p>Barriers to accessing training have historically included time, cost and travel. These barriers relate to previous model which was heavily classroom-based which did not give equitable learning opportunities across the organisation.</p> <p>CA are actively seeking to address these barriers by moving to an increasingly digital offer.</p> <p>CA are also working to improve accessibility of content to enable people from all backgrounds to benefit.</p>
Where the funding comes from; Whether the funding is ring-fenced	No specific information available.



*Refugee Action Capacity Building Immigration Advice Capacity Building*

Name of project/agency	Refugee Action – Frontline Immigration Advice Project
Model of delivery	<p>Training is provided to staff of signed up partner organisations through an overarching capacity building programme. Training is supported by the Immigration Advisor Handbook. Once trained, staff and organisations must submit 'New Adviser' and 'Organisation' registration applications to the OISC at the same time. This triggers OISC assessment which if successfully completed leads to registration for the organisation. Once this is completed staff can deliver immigration advice. Conditions for organisations are that they must commit to:</p> <ul style="list-style-type: none"> <li>• Managerial time to prepare and submit an organisation application for registration with the OISC</li> <li>• Acquiring professional indemnity insurance</li> <li>• Providing staff approximately 10 days away from their day-to-day duties to attend five-day training, undertake self-study and revision, and sit the assessment.</li> <li>• Ensuring staff have Disclosure and Barring Service (DBS) checks issued in the last six months at date of OISC application</li> <li>• Ensuring staff have access to a computer, internet and ideally a headset to undertake online classroom training</li> <li>• Ensuring GDPR compliant record storage and good staff support processes</li> <li>• Providing feedback on experience and outcome</li> </ul>
Levels of training provided	Training is accredited with OISC at Level 1 and Level 2.
Profiles of people that go through the training	<p>Staff and volunteers in organisations who are working towards the OISC registration process.</p> <p>RA is open about onboarding new organisations, so long as they are not for profit and aiming to offer a free immigration advice service to migrants. Capacity has become more of an issue and RA now prioritise organisations in areas where there are gaps in provision as well as organisations going to OISC Level 2.</p>
What qualifications, if any, are provided	Some limited entry level training is not accredited. The main training is to enable organisations and individuals to meet Level 1 and Level 2 OISC requirements.
Information on costs	<p>The main costs for organisations are measured in time off work to attend training and study, although this can be significant. Costs to the organisation can of course be lower if the trainees are volunteers who are keen to develop their skills in their own time.</p> <p>There are also costs associated with OISC registration, such as managerial time and DBS checks. There are no direct OISC application or assessment charges where the organisation is not fee charging reducing the cost burden.</p> <p>Refugee Action are currently looking at the unit costing of the programme.</p>
Barriers to attending training	Once organisations are onboarded, there are no restrictions on the staff or volunteers they can train.
Where the funding comes from. Is funding ring-fenced?	Funding is from AB Charitable Trust, Legal Education Foundation and The Paul Hamlyn Foundation.

*Justice First Fellowship*

Name of project/agency	Justice First Fellowship
Training provided by:	Legal Education Foundation (LEF) and the organisation employing the individual.
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	<p>The programme aims to grow future social welfare solicitors and the expectation is that they are employed by the host at the end.</p> <p>Salary and supervision costs are funded by the Legal Education Foundation (LEF) for the duration of the 2-year training contract.</p> <p>Eight cohorts have gone through the scheme so far.</p> <p>The LEF run the programme and provide support and networking opportunities for those enrolled. There is also a Justice First Fellows peer networking scheme.</p> <p>LEF advertise vacancies for the scheme and process the applications. This helps reduce the burden on the host organisation.</p> <p>The Fellows are exposed to 3 areas of social welfare law education and practice development.</p>
Levels of training provided:	<p>In-post training with supervision provided and funded by LEF.</p> <p>Additionally, Fellows and hosts attend regular sessions on developing their project, professional development skills, additional training e.g., marketing and fundraising, well-being support provided by Claiming Space, and access to useful networks.</p>
Profiles of people that go through the training	<p>Since 2014, 120 Fellowships have been awarded across the UK over eight cohorts.</p> <p>Of the 66 fellows that have graduated from the scheme so far, 65 are in paid employment and one is the primary care giver for her family. Ninety-one percent are now working as lawyers in roles using law for public benefit. Of this 76% are in NFP or private firms specialising in social justice areas of law and 15% are in the public sector or courts service.</p> <p>No one to date has failed to qualify.</p> <p>Of the current group of trainees about to qualify it is likely that 13 of the 16 will stay with their host. One is moving to a previous employer (in the sector) and one is moving to private practice. The forward plan of the final trainee is currently unknown.</p>
What qualifications if any are provided	The scheme is to train solicitors (SQE) with skills and experience in providing social welfare legal advice.
Information on costs	<p>More than 4 million in funding has been provided so far to the scheme, funding eight cohorts (see above).</p> <p>The cost per Fellow depends on local salary costs, so vary from £75-100k over 2 years. In London, costs are likely to be approximately 50K per year including the funded supervision element.</p>

*Justice First Fellowship (continued from previous page)*

Name of project/agency	Justice First Fellowship
Barriers to attending sessions	<p>The scheme is only open to those who have done the Legal Practice (LPC) course. This restricts access to those who have had this opportunity.</p> <p>Funding for the individual Fellowship ends after two years. The expectation is that the host employs the Fellow at that point is of course dependent in funding being available within the host organisation to do this. Uncertainty around this aspect may discourage some from applying to the scheme.</p> <p>If using legal aid funding for employment going forward, it takes a while for the newly qualified trainee to build up a caseload and bring in income. One suggestion to mitigate this barrier was to consider funding for three years, with funding reducing (taper) as Fellows start to bring in income.</p>
Where the funding comes from? Whether the funding is ring-fenced?	<p>The Legal Education Foundation fund the scheme.</p> <p>The funding is ring fenced to train a social welfare solicitor within a host organisation, according to an agreed framework.</p>

*Apprenticeships -University Legal Centre (ULC) co-ordinated programme*

We have focused this section on one apprenticeship model which we found through our consultation. There may be other structured programmes working in this area in the not-for-profit advice sector but we did not come across them. The stakeholder from ULC that we consulted did not know of any comparable schemes but noted the uptake in other sectors such as private law firms.

The description of this scheme here focuses on pathways to solicitor qualification developed by ULC, utilising the apprentice levy. Other stakeholders we consulted expressed interest in developing apprenticeships geared towards becoming an advisor within a holistic context.

Name of project/agency	University Legal Centre existing co-ordinated scheme
Training provided by	In house to qualify as a solicitor
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	<p>Offers a route to qualifying via the SQE for those who have not done the Legal Practice course. This is with the aim of increasing the pool of potential applicants.</p> <p>There are two routes i) a two-year route for those with a law degree and ii) a six-year route for those without. This represents a good opportunity for those without a law degree which implies a potential for SQE qualification for a more diverse group of people.</p> <p>Individual apprenticeships may qualify for funding for the training aspect of the scheme via the <u>Pay Apprenticeship Levy</u>.</p>
Levels of training provided	<p>Knowledge and skills development in advice provision is achieved through supervision within host organisations, supplemented by existing online and CPD resources.</p> <p>There are also some online training routes to SQE qualification with some proposed to be developed for the not-for-profit sector (see below).</p>
Profiles of people that go through the training	<p>Since September 2020, the UCL scheme has supported ten solicitor apprentices. UCL are employing three apprentices directly, whilst providing remote support to the other seven. These seven are respectively employed by the Limehouse Project, the Island Advice Centre, the Bromley by Bow Centre (all in Tower Hamlets), and the Mary Ward Centre, the Anti-trafficking &amp; Labour Exploitation Unit and Luton Rights Centre.</p> <p>Eight of the ten apprentices already have law degrees and are on 30-month apprenticeships. The remaining two have non-law undergraduate degrees and are on 6-year apprenticeships.</p>
What qualifications if any are provided	<p>All applicants are required to pass SQE Stage 1, whatever degree or other qualifications they already have.</p> <p>SQE Stage 1 mainly assesses legal knowledge through multiple-choice examinations. The applicant must complete SQE Stage 1 before progressing to SQE Stage 2. SQE Stage 2 assesses the applicant's legal skills through practical examinations and assessments.</p>
Information on costs	<p>There is no precise information on costs available currently but see below Where the funding comes from.</p> <p>The scheme is largely a vocational route to qualification as a solicitor for existing staff utilising the SQE. It is therefore predicated within the UCL model of developing pre-existing staff. This is seen as a relatively stable model going forward.</p>

*Apprenticeships -University Legal Centre (ULC) co-ordinated programme (continued from previous page)*

Name of project/agency	University Legal Centre existing co-ordinated scheme
Barriers to attending sessions	<p>As applicants must be doing qualifying work the scheme ideally suits to those in an advice role.</p> <p>All applicants to the apprenticeship must either have an undergraduate degree or experience equivalent to study at degree level (for example, by completing a degree level apprenticeship prior to application).</p> <p>The scheme is not as well suited to those working in a triage role. Some organisations have found that working in triage role (which is in itself a highly skilled role) is a common route for people wanting a legal career. However, this group would face barriers to participation in the scheme.</p> <p>The 5/6-year route is quite long and requires a significant level of commitment and stability from the organisation and the individual. Some people on the apprenticeship scheme that we spoke to were doing the required training in their own unpaid time due to the lack of resource in their organisation to fund it.</p> <p>To optimise access to the scheme funding is needed for employing organisations to be able to support the apprentice for the duration of the course (for example, subsidising the training contribution).</p>
Where the funding comes from? Is the funding ring-fenced?	<p>Funding is available via the apprentice levy which funds Employers – those with a total annual pay bill of less than £3million – pay 5% of the cost of their apprenticeship training and the Government pays the rest.</p> <p>For example, corporate law firms and local authorities can transfer up to 25% of their Levy to organisations in the advice sector to fund apprenticeships. This means that all the training fees (including assessment and exam fees) can be met by Apprenticeship Levy transfers.</p>

To fully realise the potential benefits of an apprentice scheme in London, a more systemic and comprehensive model is proposed by the current provider. We have outlined this overleaf:

*Proposed apprenticeship scheme – step change scheme*

	Apprentice scheme - scaled scheme
Training provided by:	The proposal is that a trainee 'pool' would provide flexibility to assign trainees both to commercial law firms and advice sector organisations facing temporary recruitment problems. This could all be done without affecting the apprentices need to accrue Qualifying Work Experience (QWE), as QWE can be accrued at up to four different organisations. Such agency relationships would help to subsidise future apprenticeship opportunities. Training would be co-ordinated and provided by proposed co-ordinators and brokers through existing developed scheme.
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	Explore with the GLA, whether a solicitor apprentice programme can be recognised as a GLA employment hub. The GLA would need to identify 'legal services' as a priority area for hub status to be potentially granted.  Proposed that University House could establish an employment agency themselves or working in partnership with an existing niche provider such as Flex-Legal. Co-ordinators will act as supervisors within the scheme and use developed existing training models such as BARBRI.
Levels of training provided:	Trainees would be sought from across all London boroughs to train as solicitors up gain the SQE standard and become specialist solicitors in a social welfare law area. The scheme would link into the corporate sector developing training and placement opportunities for those on placements.
Profiles of people that go through the training	Identified by local authorities and local agencies. This scheme would act as a service broker to enable local grass roots advice and community schemes to take part in the scheme. Coordinators will create strategic links to facilitate and develop pan London involvement.
What qualifications if any are provided	SQE to qualification
Information on costs	Funded co-ordinator of the scheme who could also act as an 'apprentice supervisor'. In total there should be two funded supervisors. Many scheme participants will not need external supervision so two scheme supervisors a good starting point, subject to review. This would cost £100K per annum. One post would lead on the development of strategic links and brokerage to enable participation. This may require a funding pot.  20% back-fill for some organisations against training costs. Some organisations should be offered £77.35 per participant each week for 30-months (if graduate route) or 6 years (non-law graduate route). Discretion should be built into scheme to offer more than LLW in exceptional circumstances together with any additional capacity costs as above.  This 20% back-fill support would amount to about £4,000 each year for each apprentice. This would be on top of the £3,000 provided by central government for employers who take on apprentices.
Barriers to accessing	None identified
Where the funding comes from? Whether the funding is ring-fenced?	Proposed that funding for such a scheme would come from: <ul style="list-style-type: none"> <li>• Apprentice Levy</li> <li>• s106 Community Project Funding</li> <li>• Proposed trust funding</li> </ul>

*Money Advice and Pensions Service (MAPS) –Debt Free London and Toynbee Hall*

MAPS Scheme	Debt Free London (DFL) and Toynbee Hall (co-ordinated model)
Training provided by	Toynbee Hall in line with the MAPS model of training money advice staff.
Models of delivery	<p>Toynbee Hall have developed a training pathway which is administered centrally. Several functions are centralised in the London scheme with a pool of supervisors employed by Toynbee Hall. At present this amounts to 10 FTE trainers employed by Toynbee Hall to provide training support to 26 organisations.</p> <p>The model also centralises some core functions and logistics to ensure consistency across providers. For example, IT is purchased under a central contract to ensure participating organisations can use common systems. Toynbee Hall retain control over data systems (the case management system Advice pro) and are ultimately responsible to MAPS for the delivery of the contract. Trainees do not have a specific target of clients to work with. This is seen as a key advantage as they can focus on training free from the pressure of meeting a client numbers target. The number of trainees recruited was high to ensure an impact on the supply of money advisers. Most remain within the scheme to date.</p>
Levels of training provided:	<p>Career pathway has been developed broadly structured as follows:</p> <ul style="list-style-type: none"> <li>• Standardised moving from level 2/3 NVQ</li> <li>• Second stage is shadow advice. Trainees need to demonstrate that they were able to get up to 75% competency in the 5 areas that they needed to address. This was done by assessing their prepared letters designed to show that level of competency.</li> <li>• Trainees provide assisted advice. These were supervised either internally or through the technical supervisors available.</li> <li>• After five consecutive, supervised episodes trainees could apply for a role as part of graduation. All partners signed up for this.</li> </ul>
Profiles of people that go through the training	Sixty trainees in total in cohort
What qualifications if any are provided	Trainees are trained through the Money Advice pathway developed by Toynbee Hall to be in line with MAPS requirements.
Information on costs	<p>Sixty trainees across the 26 organisations.</p> <p>Toynbee Hall pay 22K p.a. for salaries. Participating organisations have the option to increase this. Standardised core costs of 20% are paid to all participating organisations together with central infrastructure support.</p> <p>Participating organisations have targets to ensure full payments made against agreed contract. The overall target associated with this payment is to provide advice to 26,000 Londoners p.a.</p>
Barriers to attending sessions	Levels of salary and making the scheme bespoke to fit the needs of particular organisations.
Where the funding comes from? Is funding ring-fenced?	<p>The service is funded and commissioned by the Money Advice and Pensions Service, renewed on an annual basis.</p> <p>The funding is ringfenced and agreed on an annual basis to fund the Debt Free London scheme.</p>

*Examples of other current proposals to develop skills development/qualification pathways*

Our consultation has included speaking with consortiums and individuals who are exploring ways to provide effective and funded routes to enable people to become Social Welfare lawyers. These are notably through connection with the ‘for profit sector’ and using the skills, funds and expertise available in the significant legal sector in London. These schemes, both currently at proposal stage, aim to develop partnership solutions to train and develop social welfare solicitors and give people trained opportunities in the private sector.

**Linklaters proposed scheme for a Social Welfare Solicitors Qualification Programme**

Linklaters	Proposed scheme: Social Welfare Solicitors Qualification Fund
Training provided by:	Proposed to be co-ordinated by Linklaters across training partners
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	<p>The aim is to fund and train solicitors in social welfare law areas. It is designed to take into account opportunities afforded by changes to the SQE.</p> <p>The proposed scheme will also develop an online training platform (Barbri - a provider of law training packages) with the aim of increasing flexibility, reducing cost and optimising adaptability for different audiences. This should ensure more effective and diverse reach.</p>
Levels of training provided:	Funded scheme to train social welfare solicitors utilising the SQE and vocational training.
Profiles of people that go through the training	<p>The scheme is still in proposal stage, so profiles are not available. There has been significant potential interest from a pool of not-for-profit agencies.</p> <p>It is currently envisaged a pipeline of 22 new placements (subject to funding).</p>
What qualifications if any are provided	The proposal is to train 22 solicitors in social welfare law via a pathway developed for dedicated social welfare worker. The plan is that this would create capacity to scale to a long-term ongoing pathway across social welfare law areas.
Information on costs	<p>The overall proposed cost is £200k for 22 placements.</p> <p>These costings include access to the online platform already developed as part of BARBI’s Law School offer.</p> <p>The proposers assess that there are currently at least 200 eligible candidates. Costs for all of these to go through the programme to qualification would therefore cost c. £2million.</p> <p>The proposer’s immediate priority is to identify funding of £200k-£500k to fund all currently eligible candidates for Yr1.</p>
Barriers to attending sessions	<p>The scheme is not yet funded and will require some capacity within host organisations to support trainees.</p> <p>Mapping of potential applicants and identification of target areas would help to ensure more equitable access.</p>
Where the funding comes from? Is funding ring-fenced?	£90,000 has been pledged from law firms for the scheme, against an overall projected cost of £200K for year 1 operation.



### Flex legal proposed scheme for Social Welfare Solicitors Qualification Programme

Social Welfare Solicitors Qualification and agency approach	Proposed by Flex legal.
Training provided by:	Proposed to be provided by Flex legal based on an existing pilot model
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	<p>In the proposed scheme and based on the pilot, Flex legal will employ the trainee for 2 years and second the trainee to the not for profit for 1 year minimum.</p> <p>The Not-for-profit partner will receive 2 trainees in the two-year model.</p> <p>After 2 years, the organisation can offer a role if they wish.</p> <p>To manage expectations for both parties, it will be made clear to the trainee that ongoing employment is not guaranteed.</p> <p>Flex will provide 4 weeks training for the trainee before they come into team. This is to train soft them in soft skills, for example communication, presentation, office working and some basic legal skills.</p>
Levels of training provided:	Funded scheme to support the training of social welfare solicitors over a 2-year period
Profiles of people that go through the training	To be determined. It is currently proposed that the scheme would operate in the not-for-profit sector. The scheme would be utilising an apprentice route to qualification.
What qualifications if any are provided	Trained solicitors in social welfare law area with a developed pathway for dedicated social welfare workers creating capacity to scale to an effective pathway across social welfare law areas.
Information on costs	<p>Per applicant proposed in this model (for profit):</p> <p>Annual Trainee Salary: £28,000            Cost of Employment: £32,760            Exam fees: £2,000            SQE prep courses: N/A (reimbursable through Apprenticeship Levy)            Apprenticeship Levy Training Cost: £2,730            Supervision Costs: £6,000</p> <p>Total Cost to Flex: £43,490 per annum            Annual Cost to agency providing the placement £55,000 per annum payable monthly @ £4,583</p>
Barriers to attending sessions	Scheme is not funded yet and will require some additional capacity to support within organisations and a cost benefit comparison with similar schemes.
Where the funding comes from? Is funding ring-fenced?	<p>Apprentice levy will provide access to some of the cost.</p> <p>Other funding to be identified.</p>

*Newham Anti-Poverty Alliance Community Capacity Building*

Name of project/agency	Newham Anti-Poverty Alliance Capacity Building Programme
Training provided by:	Range of partners of Newham Anti-Poverty Alliance
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	<p>Capacity building of all those working with people facing poverty related issues is the skills development focus of a borough-wide partnership of voluntary and faith sector organisations and the Local Authority, led by Public Health. Community organisation staff are mainly providing advice within a holistic context.</p> <p>The theory of change for the programme is based on clear and consistent anecdotal evidence that Newham residents need services that are local and that they trust. Community-based organisations, including those targeted towards specific cultural groups and faiths, but also increasingly food banks, are those which are trusted by local communities. They are therefore the best entry point for local people in need.</p> <p>An initial multi agency capacity building training programme has focused on basic awareness raising, knowledge and skills development in relation to identifying the issues underlying specific problems with housing, employment, money and benefits and immigration. It also includes drop-in sessions where complex cases can be worked through together for best client outcomes and mutual learning across organisations. This does not provide specific advice training but is an entry point to understanding the issues that might underlie complex problems and this enables holistic assessment and more appropriate referral. The approach is distinct from social prescribing, being focused on assisting social welfare advisers to understand the ‘back drop’ of cases more quickly (by building on community-based assessments/triage) and allow them to focus on addressing them through the advice they provide.</p> <p>The success of the approach has led to the Newham Anti-Poverty Alliance which is currently focusing on one priority for transformational change. This is to address the under claiming of welfare benefits by borough residents which is estimated currently at £20 million.</p> <p>Through the Anti-Poverty Alliance, mentoring and training is being provided to build community-based organisations capacity to be the entry point to a triage system and to provide initial holistic assessment and entry level advice. The training is delivered by four local specialist advice providers and this increases awareness of the range and focus of these providers and helps to ensure that referrals into them are balanced.</p> <p>Local Authority welfare rights advisers mentor people in community-based organisations to develop their skills to address need at the client entry point.</p> <p>Newham see the work of the alliance as being distinct from a social prescribing model. Strategically and in practice, it is precisely focused on identifying and addressing need earlier, thereby making the most effective use of specialist advice capacity for more complex cases.</p> <p>At the beginning of the programme, potential risks of incorrect advice being provided was a concern expressed by specialist advice organisations. This is being addressed in the pilot initiative that emphasises the importance of providing ‘support that does no harm’ and that referral into more specialist advice provision is better than providing incorrect advice.</p>

*Newham Anti-Poverty Alliance Community Capacity Building (continued from previous page)*

Name of project/agency	Newham Anti-Poverty Alliance Capacity Building Programme
Levels of training provided:	<p>Entry level advice knowledge and skills.</p> <p>Assessment and triage skills</p> <p>Legal knowledge that educates community organisations in when and how to refer for more specialist advice.</p> <p>No specific accreditation.</p>
Profiles of people that go through the training	Volunteers and paid staff of community organisations that have a role in identifying people who can benefit from advice before problems escalate (see above: food banks, faith groups, community-led and peer-led groups, targeted community organisations).
What qualifications if any are provided	None but this may be developed in future.
Information on costs	Non available.
Barriers to attending sessions	<p>None identified.</p> <p>The sessions have been successful in attracting a range of trainees across different organisations.</p>
Where the funding comes from? Is funding ring-fenced?	Local Authority contributes via x2 specialist Adviser time and Public Health staff time.

*Strengthening Voices, Realising Rights (SVRR)*

Name of project/agency	Special initiative by Trust for London to resource and bolster the capacity of Deaf and Disabled People's Organisations (DDPOs) to offer welfare advice
Training commissioned and provided by:	Inclusion for London, co-ordinating the programme and bringing expertise from a range of training partners (see below).
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	<p>This initiative provides for additional advice capacity for Six Deaf and Disabled People's Organisations (DDPOs), mainly those providing advice within a holistic delivery model.</p> <p>The scheme also provides capacity support and training which the Trust has commissioned Inclusion London to deliver. The training offer is mainly informed by the needs of the organisations funded by SVRR but other DDPOs can access this provision. The aim of the capacity building is to upskill staff, their managers, and volunteers in advice giving and related skills. Training is provided through specialist organisations such as Child Poverty Action Group (CPAG), Disability Law Services and others. Training is aimed at beginner, intermediate and advanced levels to meet different entry points and needs. Inclusion London also coordinates a Peer Support Network where advisers from DDPOs can meet for peer support and discuss issues confronting their clients and potential solutions.</p> <p>In addition, the offer includes 1:1 advice on the use of equality, anti-discrimination and human rights legislation. This helpline enables advisers to discuss a case and gain further advice. Inclusion London also provides in house briefing/training on a range of subjects to meet DDPOs' needs, for example: charging for social care; how to use the ombudsman; using social policy arising from casework in campaigns and a range of housing and social care related briefings. Examples of recent training/briefings include: Challenging Work Capability Assessment (WCA) decisions CPAG</p> <ul style="list-style-type: none"> <li>• Using evidence from casework to achieve change</li> <li>• Universal Credit for Disabled Claimants</li> <li>• Understanding Council Tax</li> <li>• How 'Reliability' Regulation 4 Can Save Personal Independence Payment</li> </ul> <p>Inclusion London aims to use evidence arising from casework in broader campaigns and networks as well as to influence local and national statutory bodies to ensure issues affecting Deaf and Disabled people are recognised and addressed. Quarterly peer network meetings aim to create a community of learning offer briefings on particular social welfare advice areas, such as legal briefings on issues such as rights in social care, housing and complaints procedures.</p> <p>Trust for London has also commissioned other providers to support funded DPPP's on issues such as monitoring &amp; evaluation and adapting online ways of working when the covid pandemics broke out</p>
Levels of training provided:	Diverse range as described above.
Profiles of people that go through the training	Staff from DDPO's, Managers (relating to managing advice/advice workers), trainees, and volunteers

### *Strengthening Voices, Realising Rights (continued from previous page)*

Name of project/agency	Special initiative by Trust for London to resource and bolster the capacity of Deaf and Disabled People's Organisations (DDPOs) to offer welfare advice
What qualifications if any are provided	None specifically for individual trainees.  The initiative supports DDPOs to consider the Advice Quality Standards and provides support to work towards the standards and develop in house quality manuals. Learning from the project has contributed to sector learning through, for example, development of a quality manual in association with the Advice Skills Alliance and Recognising Excellence.
Information on costs	£140,000 between 01.04.2019 and 31.03.2022, and £92,000 from 01.04.2022 to 31.03.2024
Barriers to attending sessions	None
Where the funding comes from? Is funding ring-fenced?	Initially commissioned for 3 years by Trust for London and now extended until April 2024.

### Quality assurance

Above we have noted concerns of stakeholders we consulted about lower levels of quality in parts of advice provision.

Quality advice is in itself a contested term. Stakeholders we consulted described it variously as “accurate advice”, “advice that does not set up unrealistic expectations of outcomes for the individual”, “holistic and empathetic response to need” and “supported referral rather than unsupported signposting”. Clearly the culture of organisations is reflected in these diverse interpretations of ‘quality.’

Stakeholders generally regarded the AQS standards owned and managed by the Advice Skills Alliance (ASA) as very useful. The requirements in this standard are primarily aimed at the policies, processes and procedures organisations have which allow the provision of good advice. They do not judge the legal accuracy of the advice nor assess the service culture.

As part of their proposed quality assurance process, the Advice Skills Alliance (ASA) have recently proposed fundamentals of quality advice as being based on three elements: that advice practitioners are well trained; that they are well supported and supervised, and that peer review is employed consistently to enhance their ongoing learning. This could offer opportunities for pro-bono input to deliver maximum effectiveness.

Lack of advice supervision (over and above management supervision) has been consistently highlighted as a barrier to necessary standards of advice provision, workforce motivation and wellbeing. It was noted by several stakeholders that without quality supervision, training per se will always be limited in value. There was universal agreement with our hypothesis that development of supervision as a pooled function would be beneficial. One person we spoke to highlighted the need for it to reflect the specific needs of individual organisations. We have reflected supervision provision as appropriate in our examples above in 2.4.

### *Quality in online advice*

There is a general recognition that moving more advice online is attractive to funders and is useful in facilitating access to advice for larger numbers of people. However, not all the workforce has the digital skills or hardware necessary to do this in a high-quality way. This appears to be particularly the case in more community-based organisations, where the provision of externally validated and flexible supervision would improve standards. Our consultation indicates the importance of funding

online advice in a considered way which considers the need for digital upskilling of staff and advice on suitable hardware options to ensure it is delivered well.

Some stakeholders we consulted highlighted the risk of the move to online advice compromising the more holistic nature of community-facing advice, with the corresponding risk of not meeting the needs of the most vulnerable. Overall, it is important that increased digital presence runs alongside direct (face-to-face) community presence, to avoid exacerbating digital inequalities amongst clients and to sustain the trust that direct community interaction promotes. This is an issue that is important for both sector providers and funders to consider.

Interest has been expressed by LASA and CPAG in looking to develop a digital Welfare Rights training platform to pilot a new approach.

## 2.5 Retention

### *Inconsistency across the sector*

Whilst a quantitative audit of staff training was beyond the scope of this work, it has emerged clearly from consultation that some parts of the advice sector are more stable than others, for example, employment advice.

It was highlighted by several stakeholders consulted that this could result in a lack of common ownership and consideration which reduces the sector's ability to consider coherent solutions to retention across the sector.

Overall, retention was identified as a significant challenge. As highlighted by AdviceUK and others, high staff turnover is both disruptive, time-consuming and costly. This highlights once again the importance of in house focus on staff development and wellbeing.

### *Employment conditions*

Often expressed concerns were inadequate levels of pay and generally poor terms and conditions of employment. Several stakeholders consulted noted that this was a particular problem for smaller community-based organisations.

Salaries were raised as a concern by the staff we consulted (see Barriers and Enablers 3). It was also raised by several funders, who emphasised the leadership role that funders could play if they collaborated to establish salary benchmarking and bandings and to ensure through contracts that salaries were appropriate for the role and comparable to salaries in other parts of the sector. There are challenges to this. Providers clearly need to have the flexibility to set their own salary bands in line with those in the rest of the organisation. Funders also have a role to play by enabling organisations to be confident in setting realistic salaries. Some funders already do this and are proactive in promoting realistic salaries and good employment conditions in funding applications. Trust for London, for example, have removed the upper limit for applications for the advice strand of their Connected Communities programme and actively prioritise funding under this programme to BAME-led and DDPO organisations. For more funders to follow suit would be a positive step forward. This may have implications for funders in terms of overall maximum grant and oncost allocations. An open conversation between funders themselves and between providers and funders could help to move this issue forward. As one funder pointed out, the immediate implications of such a strategy may be that less posts are funded in the short term, which makes it a difficult topic to broach. However, if low salaries are serving to make the system unsustainable then it may be the best

course of action, alongside recommendations for auditing and finding ways to increase the amount of funding overall going into the sector.

*“We need to recognise that the pie is finite, whilst also working out how we can bake more pies” (Advice Funder)*

Apart from salaries, other employment terms and conditions are important. Highlighting terms and conditions as a gender equality issue, all the female staff we consulted raised lack of realistic maternity leave and pay arrangements as a major barrier to them staying in the sector, together with wider concern from some on the level of care taken by organisations and managers for staff.

Issues of employment terms and conditions have been a relatively small part of the focus of this work. It is clear from our consultation, however, that it is a major issue that merits a further focused piece of solution-focused research, which should be undertaken within the context of wider workforce development needs.

It is worth noting here that AdviceUK membership package includes free access for organisations to Croner’s Human Resources and Employment Law Helpline) and this is seen as a valuable resource.

#### *Progression routes*

Apprenticeships (see 2.4) and changes to the SQE have offered opportunity to access training and progression in social welfare law. This can be a valuable contributor to retention of staff who have come into the sector to provide entry level advice but wish for career progression.

#### *Ongoing staff wellbeing*

High stress of advice work and resulting staff burnout was the other key issue highlighted as impacting negatively on staff retention. One person we spoke to commented that

*“The consequences of making a mistake can be severe which can cause a lot of anxiety. On top of that you are always overstretched so you don’t have time to spend as much time learning and ensuring you have considered every argument as thoroughly as you would want to. Often you only have the time to do firefighting. I had to step back from frontline advice as a result of stress.” (ex-Welfare Rights Adviser).*

One stakeholder specified that this was increased by creating roles that encompass too many responsibilities and therefore creating unsustainable stress.

There was consistency in the view that advice work involves working with people with worsening and more entrenched problems and that staff were increasingly impacted by vicarious trauma and feelings of being unable to cope with demand. This was consistently highlighted by stakeholders we consulted from across the advice sector continuum as a factor in staff looking to leave the sector. Pressures have been further exacerbated by the Covid pandemic, where advice moved largely online, and the sector experienced huge increases in demand on what is generally recognised to be already overstretched provision. A related issue raised consistently was the lack of time and sometimes skills set of some managers, which is hampering their ability to support and develop staff effectively. This may be further exacerbated by a market seen as increasingly focused on delivering a large number of cases (and output driven contracts) which is impacting on management capacity and therefore quality.

Several stakeholders expressed the view that these macro issues of the Covid pandemic, less funding in the system and increasing demand and pressures on organisations, did not negate the responsibility on organisations within the sector to do what they could to address staff wellbeing.

Several people noted that salaries might always be lower in the advice sector than in other roles (see above), but a focus on wellbeing could mitigate this.

For deaf and disabled people, access to a career in advice work is hampered by the same barriers as to employment in general and this needs to be addressed by the advice sector in order to benefit from the unique contribution they can make to a diverse workforce. Employing deaf and disabled people also enables the sector to reach other deaf and disabled people needing an advice service.

Similar issues for staff from BAME groups did not arise in our consultation but may also be worth investigating further with consideration given to sample staff satisfaction surveys to obtain a benchmark.

On a more positive note, several stakeholders in community-based organisations highlighted the close links of staff to their local communities as being a strong motivator which contributed to resilience and was therefore a potential enabler of wellbeing. One of our focus group members highlighted this from her personal experience of helping community members in the way her own parents had previously been helped:

*"I was able to offer that service to my local community, so I think that's what it was with me. That kind of stayed with me it's just that knowing that you're able to help people out there who are not able to access a lot of the service that they have to - they struggle with. And that was it for me and I've been doing it for so long and I never get bored of it because it's one of those jobs - is just so rewarding and sometimes it's the simplest thing people say to you as "thank you". Their gratitude and you know, the fact that you've made a change, and you changed someone's life and it's such a simple thing, but it has such a major significant impact in their lives" (staff member of community-based organisation).*

AdviceUK encourage their members to use a 'Whole person, whole community approach', to optimise the inclusion and induction of new team members and encourage retention through staff wellbeing. This involves developing a 'growth mindset' (<https://www.mindsethealth.com/matter/growth-vs-fixed-mindset>) in order to maximise staff ownership and service quality and productivity.

There are several useful examples of organisations increasingly focusing on wellbeing, putting it at the forefront of colleague interactions and embedding promotion of wellbeing as an organisational norm. An amalgamated example is overleaf:



*Amalgamated example of wellbeing solutions*

Organisational focus on wellbeing	Amalgamated example from a range of agencies
Description of model	<p>All providers organisations we spoke to recognised wellbeing of staff as a priority in relation to retention.</p> <p>Many organisations were offering access to Mental Health First Aid training to staff. It is a relatively inexpensive way to empower staff and promote peer support in wellbeing within organisations.</p> <p>Structured peer support opportunities are emerging across a range of networks and organisations. For example, Citizens Advice is a larger provider that has embraced a wellbeing focus through for example:</p> <ul style="list-style-type: none"> <li>Embedding an objective within their current year Business plan on acknowledging and addressing wellbeing</li> <li>Encouraging open conversations about wellbeing (or lack of wellbeing)</li> <li>Commissioning a 24/7 wellbeing service for staff</li> <li>Developing a programme of staff webinars</li> <li>Development/collation of a range of tools and resources</li> <li>Encouraging peer support across offices</li> <li>Forming a wellbeing action group to influence and act on wellbeing initiatives</li> <li>Commissioning access for staff to Mental Health First Aid training</li> </ul>
Profiles of people that are recruited	Staff and volunteers across a range of provider and membership/network organisations.
Any evidence of reaching qualification or recognised skills levels?	Not applicable
Information on costs	None available
Barriers	<p>Staff time and in some cases lack of time for effective management and pastoral care</p> <p>Limited value in the face of poor employment conditions (see above).</p>
Enablers	Staff appear to value the organisational focus on wellbeing, even when they do not access every opportunity.
Where the funding comes from. Is funding ring-fenced?	Currently tends to be absorbed within organisational budgets currently. Specific funding identified to support wellbeing initiatives within organisations would be welcomed.

**Actions for retention:**

Funders to work collaboratively to identify salary benchmarking and address salary and wider employment conditions in contracts.

Address potential of CPD after qualification to retain qualified staff.

Funders and provider sector leaders to provide opportunities for sharing of learning in relation to addressing staff wellbeing.

Funders to resource sector wide access to Mental Health First Aid training.

Funders to address wellbeing issues as part of funding specifications and budgets for project proposals.

Funders to include in funding specifications and contracts additional resourcing for organisations to make reasonable adjustments for deaf and disabled people to undertake advice roles.

## 2.6 Leadership

There was a consensus in our consultation that there is an urgent need to re-energise advice sector leadership, particularly in the not-for-profit sector.

A specific concern expressed was a lack of effective management and structural support while working with a client group with significant and ongoing complex issues involving trauma, discrimination and poverty. Managers and leaders need to have the time and skills to provide effective direction and support, harnessing motivations of staff to achieve positive social change. Leaders need to stay abreast with latest tools and solutions.

Within this is a concern over the connection between collective leadership in the sector and how managers and leaders can come together with funders to identify creative solutions.

Many stakeholders we consulted spoke about the problem of 'ageing leadership' within the sector. This does not mean that this is a problem per se in all individual cases, but it does highlight the paramount importance of nurturing and retaining existing staff, including new entrants who are the potential leaders of the future.

A concern expressed by many stakeholders we consulted was that an overall focus on outputs within contracts and the consequent time this takes can reduce the skills and focus of managers in their ability to address the leadership skills of those that could potentially follow them in their career progression.

The time and space for current leaders to be able to step back and reflect and develop a longer-term vision is hampered by short term funding and output-based contracts. This was clearly borne out in some of the comments made in our consultation with front line staff (see Barriers and Enablers 3).

Governance of organisations is crucial in supporting the development of future leaders within organisations. 'Succession' plans and processes are necessary to ensure sustainability of leadership and many stakeholders pointed out that this was a gap in many organisations. AdviceUK recommend

to their members a focus on succession planning all the way through the workforce, promoting the importance of a skills and knowledge sharing culture within teams.

#### Examples of leadership solutions

A focus on development of future leaders is implicit in some of the initiatives that are being worked on to deal with the overall skills gap that are described elsewhere in this report. For example, Justice First (described above in 2.4) sees the development of leadership capacity for the fellow as a central aspect of the programme. The work of organisations like Money A + E ([www.moneyaande.co.uk](http://www.moneyaande.co.uk)) also shows the potential of leadership in the sector and its ability to galvanise and inspire people entering the sector.

In the wider not-for-profit sector, the Association of Chief Executives of Voluntary Organisations (ACEVO) provides leadership training directly to staff (<https://www.acevo.org.uk/skills/leadership-development/>). The National Council for Voluntary Organisations (NCVO) provide a range of governance training for Board and Management Committee members of voluntary organisations (<https://booking.ncvo.org.uk/training/categories/governance-and-trustees>).

Leadership hub

Name of project/agency	Legal Aid Practitioners Group (LAPG) Certificate in Practice Management and Management & Leadership Programme
Training provided by:	<a href="http://www.lapg.co.uk">www.lapg.co.uk</a>
Models of delivery? Is it delivered through a tutor/instructor or is it delivered through online reading/answering questions (self-taught)?	The course is delivered online across ten full days of training (lecture and workshop based) and 8 half day tutorials. Materials (including video content) are provided through an online learning platform and the learners are encouraged to communicate directly with each other alongside the organised content. In addition, each learner has access to a dedicated tutor who supports them through the programme. As well as the training, the learners' organisations have access to consultancy support to help them implement change associated with the learning. All learners then become part of the MLP alumni network and are encouraged to continue supporting each other as well as having access to periodic alumni events.
Levels of training provided:	The training is introductory at some levels (on theory of change, gap analysis, SWOT and PEST analysis). It is more challenging at other levels (for instance in terms of leadership, communications and managing staff etc.) and it is high level / expert in other areas (financial management, risk management, governance etc.). It is aimed at giving those who attend the immediate skills that they need to be effective managers but also to understand where they might want to focus their future personal development.
Profiles of people that go through the training	Current CEO's, managers and future managers from across the specialist advice sector (typically organisations employing lawyers or regulated by OISC and with many being Citizens Advice, members of LCN or members of AdviceUK – or similar). Participants are from right across the UK with participants from Northern Ireland, Wales, Scotland and most regions of England.
What qualifications if any are provided	Not currently accredited due to cost and because as was not seen as of sufficient value by participant. Would review this if was seen of having value in the future.
Information on costs	<ul style="list-style-type: none"> <li>• One MLP course per year (24 participants)</li> <li>• Development and updating of an online Introduction to Management Course</li> <li>• A consultancy fund (initially 100 days per year to be allocated to specialist advice agencies - particularly those who have managers on the programme)</li> <li>• 6-7 days of time each month from the Hub Directors for development and coordination of the project</li> <li>• Employment of a project officer / assistant consultant to assist with all elements of the programme administration</li> <li>• Some miscellaneous IT and materials costs</li> <li>• A small annual evaluation budget</li> <li>• The rough cost of this total project is £250k per year. Of that, £50k covers the cost of the main training programme for 24 participants. Note 3 courses to meet existing demand would be needed at present so an additional 100k to do that. £75k is the consultancy budget. The remainder covers the other elements.</li> </ul>

*Leadership hub (continued from previous page)*

Name of project/agency	Legal Aid Practitioners Group (LAPG) Certificate in Practice Management and Management & Leadership Programme
Barriers to attending sessions	Limited number of placements. At present demand far exceeds supply to the lack of training courses for leaders in the sector. Envisaged this demand will lessen as existing latent demand is met.  Demand at present points to the need for up to 3 courses of maximum 32 places each. The cost of each would be 48-56 with the higher end allowing more flexibility to give more modules on leadership and digital support.  Demand outstrips supply at present with 90 applicants for the most recent cohort.
Where the funding comes from? Whether the funding is ring-fenced?	Current cohort of 32 places is fully funded in year one by AB and The Legal Education Foundation and part funded for year two and three.
Future development	The leadership hub team have been looking at with the course is to get apprentice funding. Similar type of programme to that offered in GP surgeries. Problem is time commitment. When we asked agencies regarding the 20 per cent commitment, they could not do it so any development of that model would need to factor that in (c.f. apprentice UCL model).

### 3. Barriers and enablers

A distinct element of our work was to consult with practitioners in selected organisations providing advice. This took the form of a focus group with relatively new entrants to advice work, interviews and meetings and online questionnaires with staff and managers. The findings in full are attached in in Appendix A. We undertook this to begin to address what we saw as a gap in the representation of organisation staff and manager voices in other recent work. We designed the questions specifically to identify enablers and barriers to entry into the advice sector and to staff retention.

Important to note here is the extent to which those we consulted emphasised the impact of personal lived experience on their motivation to get involved in advice work. All the focus group participants were female and from recently immigrant ethnic minority backgrounds. They described how they themselves, or their parents, had faced complex barriers as people newly arrived in London and how the support and advice they received had positively impacted on their lives. This had directly fed their motivation to ‘give something back’ and as a path through which they could progress in skills and knowledge and establish a long-term career pathway. They had done this by volunteering in targeted organisations that included advice provision in their offer. Most volunteering opportunities came about through their university, highlighting the potential of higher education settings as recruitment vehicles for the sector, especially amongst the young and ethnically diverse populations.

The enablers and barriers identified through this piece of consultation are summarised in Tables 2 and 3 overleaf.

**Table 2: Enablers and barriers identified through staff consultation – Recruitment and entry**

Enablers	Barriers
<p>Lived experience combined with Higher Education opportunities lead to capacity to ‘give something back’.</p>	<p>Part-time and short-term contracts link to lack of good employment rights.</p> <p>Lack of good parental leave arrangements impact on women’s progression.</p> <p>Low levels of pay compared to other employment choices.</p>
<p>Community connections – knowledge of organisations because of lived experience.</p> <p>Inter-agency connections. Managers informing about opportunities and encouraging participation.</p>	<p>Lack of knowledge in communities about organisations providing advice impacts on recruitment later.</p>
<p>Social media promotion of services and recruitment opportunities.</p>	<p>Lack of social media presence of organisations impacting on recruitment – particularly of younger people.</p>
<p>Clear information on range of routes into sector for people in Further and Higher Education.</p> <p>Include qualification requirements for different routes where appropriate.</p>	<p>Lack of information about range of routes into the sector (these could be targeted to relevant college and university settings as well as specific communities).</p>
<p>Expectation of advice work as a long-term skills development opportunity embedded within a career pathway.</p>	<p>Lack of career progression opportunities create disheartenment and doubt.</p>
<p>Accessibility of apprenticeships and graduate routes to people within specific communities. Entry schemes that offer flexibility e.g., for people facing complex barriers, people with caring responsibilities, people of different ages.</p> <p>Attractiveness of ability to ‘work as you learn’.</p>	
<p>Provision of volunteering opportunities – not restricted to advice roles but offering exposure to advice provision to create awareness of its value.</p>	

**Table 3: Enablers and barriers identified through staff consultation – Retention**

Experiencing the positive life impact of their work on others.	
Structured mentoring schemes.  Good support within organisation.	Lack of stability in funding leading to managers focusing on immediate survival goals rather than organisational and staff development.  Lack of manager time and understanding of the work, due to pressures of demand and distance from face-to face delivery.
Recognition of time spent volunteering in an accredited organisation as counting towards higher qualifications.	People in apprenticeship schemes often giving significant unpaid hours to resource their training.
Opportunities to build networks across the sector.  Opportunities to have voice heard and shape future of the sector.	Current lack of opportunities.
Shared training opportunities across the sector to improve affordability and accessibility for smaller organisations.	Lack of clearly defined pathways and how training opportunities sat within them.  Recognised qualifications or competence levels reached,  Competence recognition or qualification is partially transferable to other areas of advice, including law-based career progression.
	Atmosphere of uncertainty in sector, particularly relating to career progression.
	Short term funding negatively impacts on retaining experienced staff, planning of capacity needs and long-term organisational visioning and planning.

## 4. Opportunities for development – from recruitment to leadership

### 4.1 For recruitment and entry

The most obvious opportunity for development arising from our findings on recruitment is to explore further what ‘growing our own’ advice staff looks like in community-based organisations, membership organisations such as law centres and Citizens Advice and others. This should be with a view to identifying what learning stems from this for the sector as a whole.

This relies on the whole sector recognising, valuing and resourcing the potential role of community-based organisations in contributing to recruiting entrants to the advice sector, and accommodating their progression needs. Addressing barriers to move beyond entry level has the potential to be a powerful force in diverse recruitment into the overall sector pathway. This is an important message from the community-based parts of the sector. It links to other aspects of exploring pathways from the viewpoint of smaller, community-based or community-led organisations. The potential to align motivations for getting into the sector with better skills and opportunities to develop skills in the new workforce could be particularly powerful in addressing recruitment gaps.

The need to invest in developing more structured pathways in areas of advice that are lacking this will make the sector more attractive as a career prospect for any advice entrants including those with lived experience or from the communities they serve.

Advice sector networks and strategic co-ordinators have an opportunity to work with their membership to re-connect with the original drivers behind the establishment of the advice sector, linking it to contemporary rights-based social movements and campaigns in order to re-invigorate its existing workforce and attract a diverse range of new recruits including younger people to the sector.

#### **Actions for recruitment and entry**

Undertake a further focused piece of work on the potential benefits and barriers of a ‘grow our own’ approach. This should involve community-based organisations and their staff, identifying in more detail existing models or processes and specifying clearly what such initiatives might look like to enable decisions about funding specific ‘grow our own’ initiatives.

Advice sector network leaders to work with their membership to revitalise messaging about the core values of the sector and how this links to contemporary drivers for progressive social change.

### 4.2 For retention

#### *Salaries and employment conditions*

There is a clear need for the sector overall to tackle urgently the issue of salaries and wider employment terms and conditions. Apart from salaries, other employment terms and conditions are important. The female staff we consulted highlighted lack of good maternity leave conditions as a primary reason why they may leave the sector in the future.

Formidable barriers exist to addressing this issue as a whole sector approach. One barrier to a whole sector approach to employment conditions, for example, is the diverse range of organisations in the sector and how they are constituted. Another is the fact that the funding structures, taken as a



whole, currently promote a competitive environment that functions to drive down costs within proposals.

Funders have an opportunity to influence a change of direction in the sector by promoting good employment terms and conditions within individual funding programmes and calls. Examples are included below under actions.

Our consultation highlights that funders recognise this as a key systems issue in the advice sector as well as the charity sector overall. Some funders are already attempting to address this in their calls and contracts. A commonality across funders would build on these seeds of change and can play a key leadership and practical role in beginning to turn around the culture of employment in the sector.

There is an important opportunity for the sector to explore how CPD and NVQ opportunities can be used to improve retention. This should include a widely recognised way for people to be able to see possibilities for progression and to demonstrate their skills in the sector in order to progress to more specialist or management roles. This is a long-term challenge but specific initiatives that address this issue in part can make a positive difference and add building blocks for future development.

As described above, a common theme coming from this work is the inability of organisations to plan effectively for the longer term due to a lack of funding stability, and this impacts on retention. Although funders can help by taking a longer-term approach to funding, it is unlikely that this can ever be totally addressed within the current financial climate. However, a collaborative move by funders to longer-term contracts would do much to help retention directly in terms of staff confidence and indirectly by enabling better long-term planning by organisational leaders.

**Actions for salaries and employment conditions:**

Funders to consult with relevant providers on the details of funding call specifications.

Stronger and pro-active messaging and assessment criteria that directly address funders' recognition of adequate employment conditions as good practice.

Specific allocation of funds within proposal budgets to allow for appropriate salaries and employment conditions such as maternity entitlements (for example).

Longer term funding which allows for employment contracts that will qualify for better employment benefits.

Ensuring that funding criteria include the expectation that organisations have developed good quality management support for staff.

A piece of work on salary benchmarking would be useful to underpin this development. It is also important to recognise that, in the short term, such changes may result in fewer grants and fewer posts being funded, however important from a systems change perspective. It is essential therefore that such a move is combined with a collaborative push by funders to bring more money into the sector overall.

## Wellbeing

There appears to be much good practice in addressing wellbeing emerging across the sector, driven in particular by the pressures placed on staff by the Covid pandemic. A specifically targeted piece of work on sharing learning on wellbeing would be a beneficial initiative. This could be through a more targeted piece of research but may be more effective as a specific focus for a sector wide conference or networking.

Funders can play a key role in encouraging a focus on wellbeing. This can be done through how specifications and contracts are worded, including resource allocations aimed at wellbeing in contracts and considering the specific wellbeing needs of diverse groups of staff. This would be a useful driver for advice providers to make this part of project planning.

Funders should also consider funding sector wide access to training that promotes wellbeing (for example Mental Health First Aid training).

### Actions

Funders to work collaboratively to identify salary benchmarking and address salary and wider employment conditions in contracts.

Address potential of CPD after qualification to retain qualified staff.

Funders and provider sector leaders to provide opportunities for sharing of learning in relation to addressing staff wellbeing.

Funders to resource sector wide access to Mental Health First Aid training.

Funders to address wellbeing issues as part of funding specifications and budgets for project proposals.

Funders to include in funding specifications and contracts additional resourcing for organisations to make reasonable adjustments for deaf and disabled people to undertake advice roles.

## 4.3 For training

Feedback indicates that apprenticeship and route to qualification schemes such as those we have described in our findings appear are valuable in giving people the opportunity to both develop their own careers and improve levels of quality in organisations. Such programmes develop skills that are transferable and desirable both within and outside of the profession. Given this, we think there is potential to consider the role of an employment agency for the advice sector enabling staff to have more control over the development of their careers and at the same time enable agencies to have access to trained staff when they need them.

An opportunity to develop effective training pathways at entry points and potentially at a more specialist level is being led by the GLA and this could be explored further for sharing of learning. Our preliminary discussions indicate the potential to develop advice entry level training and support packages in Further and Higher Education as well as for volunteers and new entrants to the sector.

There is an opportunity to develop skills development pathways in housing, welfare rights and employment advice to provide a clear route to articulating and recognising skills levels. This should include a development framework and accompanying guidance. This could potentially lead to the development of wider NVQ pathways working in partnership with, for example the Greater London Authority (GLA) who have a workstream focusing on NVQ's and focus on the development of quality supervision of casework as opposed to regulated organisational frameworks.

Several stakeholders warned against pathways becoming overly rigid. AdviceUK, for example, have in recent years increasingly taken a systems-oriented approach to the advice sector and its skills gap, which includes skills development. This approach emphasises building of services from the ground up, based on the client journey. In practice, this means starting from the point of the needs of people seeking advice and working from there, through the lens of empowering people to increase their agency in solving problems rather than creating unnecessary dependence on advice services. Precise training needs are likely to be different in nuance for different organisations and consequently their staff and volunteers. This issue of pathways development should be further explored with AdviceUK and other NVQ providers, in consideration of existing training pathways.

An important aspect would be to ensure the approach is accepted across a range of providers in the sector. For example, CPAG expressed interest in the development of an accredited pathway in Welfare Rights and Rightsnet expressed interest in exploring the development of learning platforms. Some stakeholders emphasised the importance of AdviceUK being involved in this development.

It is important that there is a recognition by funders of the urgent need to enable responses to the need for good quality supervision capacity in the sector. There is an awareness amongst funders and providers that we consulted that this recognition already exists but that it needs to be acted on in a strategic way, based on collaboration between organisations to maximise standards of advice giving and availability of high-quality supervision. There appears to be strong support for a model of pooled supervision across London, utilising pro-bono input where available. In the meantime, however, it is important that funders recognise the need to resource effective 'wraparound' of direct advice supervision to promote appropriate standards across the sector. This should include a resource acknowledgement of the staff time needed for disciplinary-based supervision, reflection and peer review, as well as the direct costs of paying for supervision per se. A greater emphasis on outcomes, rather than output-based funding is also an important contributor.

As a specific example, a funded co-ordinator of the apprenticeship scheme described in 2.4 could also act as a 'supervisor'. In total there should be two funded supervisors. Many scheme participants will not need external supervision so two scheme supervisors seem a good starting point to be subject of reviewed. It is estimated that this would cost c.£100K per annum.

The development of an apprentice scheme to develop social welfare lawyers was seen by many as a great opportunity to develop a pathway for people in the profession. One way to address issues of equity and diversity, raised in this report, is to pilot an extension of such a scheme that is ringfenced to applications from targeted community-based organisations. It should address the need for accessible routes in for volunteers and staff from local communities, who may not have much formal education or training but who have assets stemming from their lived experience. In principle, this is something that Law Centres might be ideally placed to host. AdviceUK have been interested in some time in piloting apprenticeship schemes with lower entry thresholds. Any such pilot should be specified with community-based organisations involvement, directly and through AdviceUK and with legal advice providers and the Advice Sector Alliance.

Several stakeholders we consulted also wanted consideration given to how the sector represented and provided for models of career progression for those working at the earlier parts of the client advice pathway, within a context of holistic support. They felt that apprenticeship schemes should promote these skills as they were important foundations from which to develop more technical advice knowledge and enabled client need to be addressed in the most effective way.

Funding of an evaluation of initiatives such as the Newham Anti-Poverty Alliance has the potential to offer deep learning to the advice sector and how issues can be addressed at a place based collaborative approach. The GLA may be particularly interested in this, given the importance of Local Authority leadership in the Newham model.

If further funding was available to develop advice provision in DDPOs and support for them to work towards the AQS if relevant, this would maximise the contribution that DDPOs could make towards the work of the sector in meeting client need.

Models should not be one size fits all and support and coordination are required to bespoke them to individual circumstances to ensure the best fit while also ensuring best value This will require a learning and skills approach to the wider workforce and possibly the need for some more centralised systems, whilst avoiding rigidity.

**Actions for training:**

Funders to explore with the GLA how their work on developing effective training pathways can be applied to other areas of the advice sector.

Funders to resource an initiative involving AdviceUK and other interested providers to develop skills development pathways in housing, welfare rights and employment advice to provide a clear route to articulating and recognising skills levels. This should include a framework for development and accompanying guidance.

The sector to explore further the possibility of developing entry level training and support packages around advice and information at entry level NVQ with the potential to develop this within apprenticeship programmes.

Funders to consider resources of a co-ordinator/supervisor for London to develop and evaluate apprenticeship schemes.

Funders to consider the specification and resourcing of additional apprentice schemes in social welfare law, that focus on increasing diversity in the sector and 'levelling up' skills development in community-based organisations.

Funders to consider resourcing evaluation of initiatives such as the Newham Anti-Poverty Alliance which show potential to offer deep learning to the advice sector regarding how skills development in the community can contribute to an approach to addressing need through an Early Intervention lens. The GLA may be particularly interested in this, given the importance of Local Authority leadership in the Newham model. The Access to Justice Foundation is involved in work to better understand the value of Early Intervention in advice, which could be a useful contribution to this investigation.

Funders to consider resource to expand or continue development of capacity building support to DDPO providers in order to maximise their contribution to advice provision.

Funders and providers meet together to collaborate on the development of a pooled system of supervision and/or peer review.

#### 4.4 For leadership

There is an opportunity for sector leaders and funders to find creative ways to initiate and drive focused initiatives that bring together legal practitioners and community based or more generalist advice practitioners to co-produce solutions to leadership challenges.

Within the sector itself, community-led and community-targeted organisations such as those serving BAME and disabled people represent a largely untapped resource bank of potential leaders, not only for their own organisations but for the whole sector. The challenge here is to ensure this potential is understood by their organisations and the wider sector to enable them to flourish. What will be essential will be an immediate and longer-term approach of ensuring they have meaningful opportunities to engage in strategies for leadership development going forward.

Training for management committee and board members in the importance of developing staff to become future leaders, and practical ways to do this, is important. This is not an advice specific function and governance training from the wider charity sector such as that provided by NCVO would address this need.

##### **Actions for leadership**

Funders should consider more clearly the role of leadership and how it is hindered and restricted within an overly output-driven and short-term funding culture.

Contracts should include requiring funded organisations to show how they are promoting good leadership in their work and including resource allocation to enable this to take place.

Current leaders in the sector can also contribute by finding and implementing ways to increase connection and engagement by the current leaders in the sector, with potential future leaders and with each other, to think clearly about how leadership can be promoted within a collective workforce strategy.

## 5. Longer term systems change

### 5.1 General funding policy and practice

Across London Boroughs, Local Authority appears to be very inconsistent in terms of amounts of funding and which types of organisations are benefiting from the funding. Increasingly, Local Authorities are commissioning advice provision through one borough-wide contract which is typically allocated to one larger provider who manages the contract, with some of the funding devolved to smaller community organisations, including targeted organisations.

Local Authority funding of advice provision traditionally included an element of core funding. The reduction and withdrawal of Local Authority funding has impacted on core funding which disproportionately affects smaller, community-based advice providers.

Overall, there is a lack of clarity regarding allocations of funding to various parts of the sector and from which sources.

There is a need, therefore, for an audit that will quantify the levels and types of funding in the sector. This should include:

- Amounts of funding in the sector
- Proportions of funding coming from Local Authorities and independent funders
- Proportions of funding allocated to targeted organisations such as DDPO's and those serving people from specific Black and other ethnic minority communities (see 5.2)
- What a map of funding would show across the London boroughs

City Bridge Trust is a funder that is increasingly prepared to fund smaller organisations who have not yet achieved AQS recognition, on the basis that they will work towards this. Trust for London contracted with AdviceUK for them to provide bespoke support to organisations to achieve AQS. This equated to c.7k per organisation to allow for resource intensive nature of the process. Whilst the outcomes from this approach appear to be good, with eight out of ten organisations involved in the programme being successful in achieving AQS, it should be noted that resource allocation to capacity support was seen by the funder as essential. This is an approach that could be widened by funders to include more organisations, dependent on identification of precise numbers that could benefit.

Targeted organisations such as DDPO's and smaller community organisations highlighted that some people requiring advice face more complex barriers to moving forward. They may therefore require more advice sessions to achieve their goals. However, funding contracts do not always recognise this. Targeted organisations we spoke to consistently cited Trust for London and City Bridge Trust as examples of funders that built trusting relationships with them and accommodated a focus on life change for clients rather than solely outputs. It is important that all funders consider this issue, which is one of equity, both for people needing advice and for advice providers.

There was a commonly shared view expressed through our consultation that advice sector organisations need to have opportunities to articulate directly to funders what type of funding they need to create a better climate for upskilling of existing paid staff and volunteers.

Consistently cited requirements cited by advice providers were:

- Inclusion of core funding in contracts, rather than solely activity-based funding.
- Longer term contracts.

- Less emphasis on outputs (numbers of people being provided with advice) and more emphasis on outcomes (positive life changes) due to the advice.
- Direct engagement with local context and community in funding models
- Funding initiatives that broker development and resourcing of key support functions such as IT to enable organisations to focus on what they are good at.

Addressing these requirements would enable:

- Sustainability of organisations providing advice
- Better financial planning
- The ability of organisations to 'grow their own'
- The ability of organisations to pay for staff training
- Better central support in non-specialist areas.

One funder emphasised the need for effective pooling by funders of resource allocations to the advice sector. This would enable better co-ordination across funders to ensure a balance of funding across the continuum. This would be most effective if built on an audit of funding (see above).

**Actions for general policy and practice:**

Funders to commission an audit of funding across the London advice sector.

Funders to enable opportunities for advice providers to meet directly with funders regarding how funding policy can enable sustainability and skills development.

Funders to consider longer term contracts.

Funders to consider a core funding element of contracts.

All funders to consider complexity of need when setting output and outcome targets

Funders to consider pooling or better co-ordination of resources across different Local Authority areas, diverse organisations and across the continuum of advice.

Funders to consider the value of emphasis on impact of advice provision, rather than an over-emphasis on outputs.

Funders that already operate this funding policy to share learning regarding its value.

Consider funding a dedicated branding and communications initiative to develop the profile of

## 5.2 Addressing equity and diversity issues

Our consultation found several overarching issues regarding equity and diversity that funders can impact.

There are many innovative programmes funded within targeted, community-based organisations providing advice. For example, Bristol Refugee Centre has been seeking new ways to develop and

train advice workers and solicitors that give opportunity to those with lived experience while trying to develop a career pathway in social welfare law for those wishing to be solicitors. At the same time there is a recognition that there is real importance in valuing more generalist or early action approaches that look at the 'whole person'.

They have brought in supervisors to develop better accreditation of skills as they develop and are developing a Partnership project with the law centre in Bristol so that they can work across what both organisations are good at better meet people's needs in advice. Refugee Rights works with people on the areas outside of the specialism needed for the referral with a corresponding increase in understanding and skills across the pathway. Funded by Tudor trust it is an example of skills and resources being complemented and increased within the sector while keeping funding within the sector.

Despite such examples, our consultation with such organisations indicated a sense that funding is disproportionately allocated to larger organisations and those providing more 'specialist' (technical) advice. Smaller, hyper-local organisations often did not find out about funding opportunities in time to partner with others or apply themselves. We also found some instances of lack of core funding being linked to lack of capacity to develop funding proposals.

A funding audit (see above) that identifies allocations to the diverse range of organisations providing advice would provide clarity and transparency in this regard. It is worth noting here, that this would be an especially timely development as many funders increase their focus on promoting the organisational infrastructure and sustainability of BAME and disability focused organisations, wider than in the field of advice provision.

Specifications for larger pilots or other delivery contracts could include a requirement that partnerships include smaller and more diversely targeted organisations. Evidence of their meaningful involvement in developing proposals should be a criterion for funding.

To ensure that targeted and smaller organisations are funded proportionately and included in larger contracts is also an opportunity to promote a 'ground-up' renewal of energy in this part of the sector where individual staff and organisational resilience appears to be remarkably high.

The involvement of targeted and smaller organisations in sector wide discussions is important across all aspects of development. It could also influence a sector wide Equity and Diversity Strategy for both funders and providers. Such a strategy would be a useful follow on from this piece of work and, more importantly, from the BAME research project being undertaken concurrent to this work.

For equity and maximum engagement, funders should arrange for payment to smaller organisations to participate in consultations and strategic developments.

**Actions for equity and diversity issues:**

Funders to ensure that any audit of funding (see 5.1) specifically identifies allocations to targeted/smaller organisations.

Funders to ensure that they work with BAME, DDPO and other targeted and smaller organisations to ensure that they have equity of access to information about funding opportunities.

Funders to arrange for payment to smaller organisations to participate in consultations and strategic developments.



### 5.3 Ensuring inclusive opportunities for collaboration

To address the skills gap in a way that promotes sustainability of the sector, it is necessary to understand and meet the particular needs of the whole range of organisations and stakeholders in advice provision. As referred to above, community organisation representatives we spoke to described feeling ‘unheard’ in a system where power dynamics did not work in their favour. The specific solution to this that was most commonly voiced was that funders should meet directly with them to discuss how apprenticeships, training offers and resource materials could be designed to be accessible, attractive and relevant to their staff.

A notable example of the value of networks is an initiative is the Employment Legal Advice Network ([ELAN](#)). This was established, funded by Trust for London in 2014, in response to concern that employment advice in the context of social welfare law was becoming increasingly fragmented. Isolated practitioners were dealing with a highly complex area of law without adequate support and opportunities for development. ELAN is a network of over 60 organisations dedicated to ensuring that people in London have access to advice about their employment rights and entitlements and how to enforce them. Monthly online meetings provide an opportunity to discuss many different issues, from those affecting employment law advisers to any other issues which impact people living and/or working within London. As a group they share information, discuss policy and advocacy papers, and take part in discussions on specific aspects of employment legal advice. ELAN also includes training opportunities covering a range of sessions from an introduction to employment law to more focused conversations about drafting witness statements or settlement agreements. The recently established BAME advice network, co-ordinated by the ASA and funded by Trust for London is another notable example of recent developments.

Increasing opportunities for cross-sector collaboration is an area of development with high potential impact for relatively low cost. Having said this, several organisations have pointed out that smaller targeted organisations offering advice as part of a more holistic offer do not have capacity to allocate time to such initiatives without additional financial support. This resource implication needs to be considered by funders in any planning of collaboration opportunities or collaborative-based funding calls.

Several consultees highlighted the need for funding of more strategic work that could address development needs across the whole sector and to improve the sector’s ability to lobby for its aims. There is opportunity for sector and organisational leaders and funders to find creative ways to initiate and drive focused initiatives that bring together legal practitioners and those providing advice who do not have legal qualification and may be providing advice within a holistic and/or targeted setting to co-produce solutions based on mutual respect and links. This applies to ways in which to address individual client need and also any workforce development initiatives that are piloted in future.

Development of a sector wide strategy, although perhaps challenging to achieve, would be a useful framework for developing collaborative spaces. In these spaces, people from across the sector would have opportunities to hear, and deeply understand, the views of others and focus on common priorities and how they might be best addressed.

#### **Actions for inclusive opportunities for collaboration:**

Funders to initiate a way of facilitating meaningful dialogue between strategic leads and funders and smaller community organisations to identify needs together and co-produce realistic solutions. What this means in practice is that funders work more specifically in a placed based way to develop a skills gap solution that involves the local community-based organisations, also drawing in the views of larger organisations and those providing specialisms.

Funders to drive and resource project-based opportunities for legal practitioners and community-based organisations providing advice as part of a holistic service to collaborate on solutions that address client journeys and related skills needs and to develop mutual understanding of perspectives.

Funders to consider resourcing the development of a sector wide strategy based on inclusive collaboration.

#### 5.4 Data sharing

We were asked to explore whether data sharing regarding training provision and access across advice providers was a realistic option. Our conclusion indicates that it is not a current priority for advice providers and some networks or representative bodies.

As a greater sense of ‘possibility’ for the revitalisation of the sector builds, data sharing could be revisited as an opportunity to promote the sector’s longer-term health. This would need clear agreement on the purpose of any such developments. Specifically, this should include how it contributes to direct learning about client pathways and resulting needs for skills development and wider issues. However, there are specific actions that funders should consider in relation to the use of data highlighted below.

##### **Actions for data sharing:**

Funders should ensure that sufficient resources are allocated within contracts for organisations to disseminate learning from their projects.

Funders should fund regular networking or conference opportunities that provide a forum for sharing of learning, based on pilot specific data.

## 6. Conclusions

This solution-focused research project has been commissioned to build on previous work that has identified a systemic advice skills gap in the advice sector and some of the key challenges that are contributing to this problem.

The advice sector is wide ranging in its types of provision and it is unsurprising therefore that stakeholders we consulted from different parts of the sector held different views. We have tried to reflect these in our findings. However, it is important to acknowledge that the number of stakeholders we consulted cannot represent the whole of the advice workforce or system.

The immediate and longer-term issues facing the advice sector in terms of delivery are exacerbated by growing levels of demand at a time when the supply of good quality services is fragmented.

In a broader sense than just the need for more training provision, the skills gap also covers challenges in recruitment, retention and leadership that require action over and above training provision.

Our consultation found that issues of diversity are important to address. Many organisations targeted to specific communities tend to be smaller and locally based. This impacts on their ability to attract funding that recognises their need for core funding and longer-term funding in a funding environment that often privileges larger organisations. This situation makes planning for staff progression through skills development more challenging.

A recognition of what community-led organisations can contribute to the system is an important thread running through the findings. Community-based and led organisations act as community anchors and have a lot of expertise to share within the system. However, the community organisations we spoke to felt that their value to the system was often overlooked and there was insufficient opportunity for them to put their case to funders directly. They need support and encouragement from funders in order to reach their potential and to maximise their voice within the whole sector.

Our work has included identifying and investigating examples of practice and opportunity that might usefully be replicated to address some of the challenges identified, by ourselves and others.

Apprenticeship schemes appear to be a useful contribution to the challenge of recruitment and early skills development at certain points, but they need continued evaluation and monitoring for positive outcomes from a whole sector perspective. There is clear opportunity and engagement from certain parts of the legal sector in London to help in the development of career escalators in social welfare law and the levy and changes to the SQE give a real opportunity to further develop this. However, unless there is focused strategic vision and co-ordination there is a danger that the potential of these initiatives for the sector is lost.

Recruitment is a challenge across the sector, but community-based organisations appear to be successfully adopting a 'grow our own' approach. This is perhaps because community organisations are prepared to recruit non trained staff and upskill them in the workplace. Law Centres also appear to take this approach. This is resource intensive and will be limited in value unless it is recognised as a funding priority in its own right and unless clear progression pathways are developed alongside. The sector needs to explore how best to match the full potential of community-based organisations providing advice as part of holistic support provision by unlocking the specialist knowledge in the sector to support skills development in these often-smaller organisations.

At the same time the sector needs to develop its language about behaviours and practice to give equal space to the wider vocational aspects of community advice work, addressing issues of power imbalance. This requires more investigation through an asset-based lens of the diverse range of community-led organisations offering advice but is a clear opportunity to reinvigorate the wider more community action or early intervention aspect of advice work.

Retention issues have been identified through desk-based review of existing reports and our own work and findings point to what has been called 'a failed eco system'. Solutions put forward include strong messages on salary levels and structures, career sustainability and wider employment rights access (which are impacted by stability of funding and therefore length of contracts) and wider staff and volunteer well-being issues.

We have included consultation with new (or relatively new) people in the advice delivery part of the sector (apprentices, volunteers and recently recruited staff) to provide their perspective on what they need from the system to enable retention and progression. We found that people are passionate about the work and value its ability to get positive change for society, but the sector

needs to look after and develop the workforce better; helping people to focus together on improving quality and required systems change. Some organisations we spoke to clearly had this in mind and were developing their own packages of support and development for the workforce.

There is a strong consensus that required skills for advice encompass knowledge-based training and delivery skills training. This is important for all parts of the sector. Community-based organisations are naturally placed to be comfortable with the holistic and relational aspects of advice giving and legal providers are naturally placed to be comfortable with knowledge-based approaches and procedural skills. All practitioners require both knowledge and skills to provide good advice. Training is clearly a key element of an effective pathway, and it is important that it meets needs across the whole continuum of advice services. Our consultation found differences in stakeholder views about the need for more training. Some stakeholders reported that training provision was inadequate at all parts of the sector. Others felt that, whilst there could be more training across the sector, overall, it was not as urgent a priority as the development of pathways for skills development and recognition and of career development.

Formal training is not the only response necessary to meet learning and development needs across the pathway. Good supervision is much more than a quality tool or checking of acceptability of advice but at its best should be a tool for supported ongoing learning. Learning from peers and leaders is also hugely important and an effective pathway needs to provide meaningful opportunities for this across the whole continuum of advice provision and not just at the points where infrastructure is better resourced and where existing privilege enables quality learning opportunities.

There is also clearly a need for a more systematic approach to developing a training pathway in all areas of social welfare law. Immigration and money advice were frequently cited as areas where the structure of regulation helps at least in some areas to frame a journey. However, a question that came up a number of times was *“when is a Welfare Rights worker a welfare rights worker and at what level?”* There was clearly a push to look at this across the range of social welfare law which would also help to democratise the sector. Some stakeholders emphasised the importance of AdviceUK being involved in this initiative.

Issues of leadership are apparent in consultations. This is potentially a very ‘soft’ issue to address in concrete and specific ways. However, linking it to skills development and to the potential benefit to leadership within the sector that is offered by an increased focus on diversity and community ownership. There are clearly concerns that the sector is not unlocking the talents in communities and staff teams and developing leadership is a central aspect of that.

We became aware early on in this project of the diverse range of perspectives and priorities across funders and those involved in strategic co-ordination and delivery as well as across the wide continuum of what constitutes ‘the advice sector.’

There is clearly a need for the voices of people new in the sector and those on the front line to be brought more to the fore in conversations on how to address the skills gap and co-produce solutions. It is clear that existing approaches have not worked and the sector needs to tap into the energy and creativity of its staff more effectively. We feel that the voices of younger, more diverse and new recruits are key to this going forward.

Finally, it is important to acknowledge that this piece of work can only be the start of investigating and addressing the skills gap. The actions for further work identified in this report will contribute to further learning.

## Appendix A: Findings from additional consultation with workforce

Patrick Nyikavaranda

### Key

F1...= Focus Group Participant

LT1 = Long-term staff in sector

2TI = Second-tier staff, including managers

A focus group was held with three female ethnic minority staff members working in the capacity of advisors in law, housing, and benefits in London. They were all recent recruits to the sector. To supplement this, an interview was held with an advice manager. We met with a group of established advice staff, some of whom went on to complete an online questionnaire. We also did an online survey with a sample of welfare rights advisors. In total this represents additional consultation with 17 advice apprentices, staff and managers.

The key messages coming from this distinct piece of work are presented below.

### Reasons for getting involved in advice work

People described clear motivations for joining the sector and the issue is when people become disheartened, they consider leaving the sector. There is a clear need to maintain the enthusiasm and ensure there is a clear career progression and adequate support for staff within the advice sector.

Personal experiences played a big part in deciding to join the advice sector. One stated *“English is a second language to both me and my parents, so my parents had a lot of challenges, and they often could not read documents”*. The spark of interest came up when their primary teacher set up support sessions for parents from ethnic backgrounds. Through the support, she witnessed her parents getting in letter reading and writing she embarked on a journey to offer advice to others who may have been in a similar position of not being able to speak English: *“there’s a lot of challenges and barriers that the local community face because English is their second language, and I was affected by that because my parents were in that category and that group.”* [F1]

For another advisor new to the sector, the motivation to start advice work was based on personal experiences of moving to the United Kingdom and finding challenges in knowing their rights in the workplace, renting and in health and social care, *“I found it quite challenging at the beginning because I didn’t know or understand how I go about renting, what rights I have at work, my rights for holiday pay, how many hours I can work what rights I have in accessing healthcare”*. [F2]

Though circumstances may have differed as to the motivation to get into the sector, all the recently employed staff in the focus group stated they started by volunteering and saw the importance of this in terms of gaining skills, experiences and as a portal to information and opportunities to get into the advice sector which they felt otherwise would have been near impossible for them to obtain. Most of the volunteering opportunities came about through the university, which highlights the importance of higher education settings as potential targeted recruitment grounds for the sector, especially amongst the young and ethnically diverse populations.

Participants spoke of the opportunities that lay in different support provision being under one roof. In one social and healthcare setting, there was a GP practice, advice agency, employment team, social prescribing, and social care, which they saw as being holistic. Most of the clients that came for specific support needs could then easily be referred to other forms of support as teams worked closely together. Provision of ESOL as an added support structure was highly recommended by the

participants *"a lot of our clients have English as a second language, so we have that ESOL department there where they can learn English"*. A lot of the advisors highlighted that there had been an increase in people with mental health needs seeking advice from them which had meant they needed to increase their knowledge of mental health support services as well as developing support skills to better support those clients with severe and enduring mental health illnesses. This was seen as a way *"we empower our clients how we can support them on a wider sort of level rather than just one area"* [F1]. The participants stated that seeing a smile or sign of appreciation from someone they had helped with advice was sometimes the biggest reward for them. This is echoed by the long-term staff member and second-tier staff.

### **Suggestions for attracting and retaining staff**

**Information.** There was a lack of information on routes into the sector other than the traditional routes. One of the routes mentioned which discouraged people from getting into the sector was that *"free legal advice from a charity, there might just be one or two opportunities there and there might not be a way to get a training contract or going through the apprentice route"* [F2]. The apprentices acknowledged the importance of connections, both personal and professional. Some opportunities have been offered through developing close working relationships with a line manager and when they heard of an opportunity through their networks, they would then pass on the information to them. If clients did not know where to go to get advice within local areas, it would be tougher to recruit for positions, so advertisement of services was seen as crucial in attracting potential workers to the sector.

**Graduate Scheme/Apprentice Route.** Participants stated they had *"never heard about the graduate entry apprenticeship until last year"* and for some, it was only through speaking to the director of legal services for a charity that came to work with them was when they discovered about the graduate scheme. They felt the apprenticeship scheme was a really good idea, especially with the uncertainty of going down the usual routes of employment into the sector. The scheme offered flexibility especially for those that had added responsibilities of childcare or were older. *"The flexibility and, that it is paid for, you know and you're doing it while you're studying and working was so appealing and I wanted to set myself for a challenge, and one of the things I realise is that you're never too old to study so this opportunity good for those that want a new challenge as well"* [F3]. A further attraction to the scheme is that of being able to work as you learn as opposed to choosing either of two options but not both.

**Volunteering** was seen to get young people or people with lived experience of getting advice into the sector. As alluded by some of the participants, this was a way they got into the sector. *"A lot of staff started off volunteering. Sometimes the clients start doing volunteer work and sometimes graduate or university students come in to do volunteer work and that's how they become aware that there's sort of services and departments that they can get involved in so again it is probably the whole factor of being aware"* [F3]. All three participants agreed on volunteering. They believed strongly that investing in relationship building with clients who come for advice may stoke up interest in volunteering. Once individuals begin volunteering, they suggested encouraging them to apply for paid roles within the teams and for supervisors to provide information on external paid opportunities once they come through their networks. These volunteering opportunities were not tied down to one service offering but encouraging people who attended other forms of support such as gardening and art to explore what was an attractive offer for them within the advice sector. This is echoed by the long-term employee in the sector who says for her getting into the sector started with volunteering, *"I started in outreach work and then moved on to youth work and volunteered at school. I must say I enjoyed the volunteering work"*.

**Education settings.** Within education settings, the participants highlighted the importance of starting to encourage young people to consider the advice sector as a potential career path. *“I think advising students at that time... that there are different apprenticeship routes and how to go about them... would be helpful because sometimes you're not sure what to do if things don't work out and I don't get the grades I want - at least there is an option”* [F2]. Participants were very keen to state that may be a way to attract potential recruits who may not necessarily understand the UK education system but may have strengths lying elsewhere, for example, connections to their communities. Participants mentioned that they spent a lot of their time doing extra work which was neither paid nor accredited. One second-tier member of staff had a solution that may be considered, *“As part of progress towards a professional qualification (barrister, solicitor) subject to appropriate monitoring & fulfilment of training criteria, time spent working as an adviser in an accredited advice agency should count towards the qualification”*.

**Marketing and broadening networks.** As the aim is to recruit younger people into the sector, it was suggested to use the power of social media as a recruitment tool. Most advice centres, they observed, did not have an active social media presence and they felt this was an opportunity lost for the sector as younger people tended to find out information about career opportunities through social media. *“Every day we crawl through Instagram, LinkedIn, and Facebook, I see that our company has only Twitter, but I think it would be pretty good and better to conduct good recruitment, let's say we have a current issue affecting the masses, why not post something on Instagram with the comment with information about the law?”* [F1]. The new to the sector, long term in the sector and second-tier staff believed in the importance of building networks across the sector and strengthening the voices through regular information exchanges, advocating for the sector and shared training to cut the costs. Active engagement with potential recruits through social media and events whilst showing the benefits of being in the sector was seen as a strategy that could work in recruitment drives: *“It is about engaging those that have the interest, so you must have a good advertising and marketing strategies to draw people into the sector. You must ask yourself what are the incentives for people to join the sector? Learning opportunities can be one of them”* [LT1].

**Continued personal development.** Whilst the participants were happy with their current career choices, they were concerned about the uncertainty in the sector, particularly around career progression and upskilling. They suggested a clear training path for the sector, standardised and transferrable qualifications for advisors and creation of opportunities to progress. *“I think having regular training has helped me build my portfolio, skills, and confidence. Someone needs to feel they are valued and that the effort they make in helping others is also recognised.* [LT1]. The sector, they believed, was too fragmented but could take lessons from other sectors that offer a qualification that may be transferable within different settings of the advice sector. This may make it attractive to younger people seeking to develop a career in the sector. This is echoed by one individual who has been in the sector for years, *“Developing a well-recognised accreditation scheme coupled with ongoing continuous development training. Better publicity of work done & how satisfying it is. For those seeking a professional qualification, the advantage of getting sharp-end experience at such an early stage, which those joining city firms will not get”* [2T1].

There was an emphasis on the need to have mentoring schemes at an early career stage to help equip new staff to the sector. These suggestions are supported by the individuals who have been in the sector for years, *“Support from the mentoring scheme has been absolutely invaluable for progression with my skills”*. For some, the continued opportunities to still engage with clients whilst

in steady employment would be welcome as an attraction to stay in the sector. Managerial positions were seen as far removed from the realities of daily client interaction due to a lack of capacity in workloads. Participants suggested lessening workloads for managers so they may have opportunities to experience both service and client delivery. *“ I’ve been saying you can’t do service delivery, while you’re managing a project or a team because eventually, it becomes inevitable there’s too much work that you have to kind of carry which is separate from service delivery so eventually my manager when she first started that she was doing a small percentage of service delivery and client delivery and eventually she just had to concentrate on management because there wasn’t a capacity to continue the client interactions and I think that just takes it away and it’s having that direct face to face contact and back to your level of work, working with clients, is what keeps me wanting to do the job I’m doing”* [F3].

**Attracting Funding to the Sector.** All persons interviewed and in the focus group decried the lack of stability in the sector, with managers thinking of meeting immediate goals rather than sustainability and developing their staff. However, what came out strongly from the interviews was the lack of funding to maintain staffing levels, workloads, and long-term visions. Part-time and short-term contracts were seen as barriers to progression. Higher pay and stability in the form of long-term contracts would attract interest and keep people within the sector. Addressing the need for funding would ensure there was a higher quality of support to enable staff to do their jobs.

### **Summary**

The advice can attract young and enthusiastic individuals. However, in the long term many become disillusioned and move on to more attractive sectors. Those that are new to the sector and those that have been in the sector longer both see the need to make the sector more attractive to stay in by ensuring there are adequate training and qualifications, effective and supportive management that motivate the workforce. Attracting funding into organisations, including core funding for staff development and stability, will bring more stability to the sector.



## Appendix B: Stakeholders consulted

(Listed in order of consultation)

Nezahat Cihan, London Legal Services Trust

Matt Howgate, Independent Consultant

Lindsey Poole, Advice Sector Alliance

Chilli Reid, AdviceUK

Julie Bishop, Law Centres Network

Nathan Fitzpatrick, Law Centres Network

Eddie Coppinger, University House Legal Advice Centre

Matt Dronfield, Debt Free London - Toynbee Hall

Carolina Albuerne, Refugee Action

Esther McConnell, East European Network

Terry Stokes, LASA

Nick MacAndrews and Daniel Drillsma-Milgrom, GLA

New entrants to the sector: Apprentices focus group

Colin Yeo, Garden Court

LX Legal and Apprentices, Kickstart participants focus group

Alison Lamb, Citizens Advice RCJ

Jerry During, Money A + E

Muna Yassin, Fair Money Advice

Mosrath Jahan, BBBC

Sarah Suavat, Island Advice Centre

Paula Twigg and Patricia Ng, Mary Ward Centre

James Kenrick, Independent Consultant

Andrew Seager, Citizens Advice

Liz Mercer and Tracey Lazard, Inclusion for London

Taylan Sahbaz, Day Mer Community Centre

Stuart Butler and David Jenkins, Merton Centre for Independent Living

Anne Bowyers, Public Health Newham

Michael Paul, Disability Rights UK

Terry Boyce, London Youth

John Mahoney, Community Links Newham

Phil Veasey, Newham Public Health

Liz Carboni, AdviceUK

James Sandbach, Citizens Advice

Sue James, Legal Action Group

Sandra Jones, City of London

Clare Carter, Access to Justice Foundation

## Appendix C: Potential for learning from another sector

The advice sector does not stand alone in having been disrupted by a systematic ‘de-valuing’ of the sector by central government along with severe reductions in statutory funding at national and local level. There is, therefore, potential learning from how other sectors have tried to address consequent skills gaps. For example, consultation with a representative from London Youth indicates a mirroring at least to some extent between the experience of the youth sector and the advice sector. The youth work sector has been wide ranging and has encompassed volunteer and community-led initiatives alongside larger and more formalised work. Levels of skills and qualification varied widely, from informal and locally based training through to university Graduate and Masters qualification. Whilst this has not essentially changed, the target driven bureaucratisation of youth work that happened in the mid to late 1990’s through to the early 21<sup>st</sup> century and the following drastic loss of funding arising from the period of austerity from 2010 onwards, impacted on the collective identity of youth work, recruitment and skills development pathways. There is therefore the potential for learning from the youth sector (as one example) in how they are seeking to address these issues on a London-wide level. Examples of initiatives to address organisational stability and access to progressive career pathways include:

- An in-depth investigation into capacity of youth organisations to apply for funding and their success rate (London Youth with City Bridge Trust) which is showing funding allocations to inner London boroughs at the expense of outer London boroughs despite displacement of whole communities due to gentrification in traditionally deprived areas of London. A response being piloted in Redbridge is to build fundraising capacity for recently established community organisations and facilitating their joint working to strengthen their chances of being successfully funded and their financial sustainability.
- A portal on the London Youth website for recruitment across its membership<sup>6</sup> enables organisations to reach potential applicants across London.
- A move to centralise access to, and provision of, training across London through increased collaboration between London Youth and Partnership for Young London (two of the largest providers of youth work training in the city). This involves development of one portal through which youth workers can access training.
- An active awareness and drive to find ways to make skills development and accreditation accessible to people coming from the communities they are working with. Many may not have a background in academic qualifications or study and often lack confidence, prior education or resources to undertake a youth work qualification. However, they can offer immense contributions to the youth sector, utilising their own lived experience for effective working with local young people and in raising the profile of those young people’s issues and concerns at a wider policy level. London Youth are involved in responding to this through two main initiatives.
  - RISE UP (funded by the London Violence Reduction Unit<sup>7</sup>) is a partnership that provides training for people that fit these criteria<sup>8</sup>. It encompasses practice development training and professional development in organisational management with parallel access to mentoring. This is with a view to them having opportunities to enhance their impact in work with young people, contribute to the development and sustainability of their own organisations and have access to career progression opportunities. A long-term aim is to enable

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<sup>6</sup> <https://londonyouth.org/member-news/member-vacancies/>

<sup>7</sup> <https://www.london.gov.uk/content/londons-violence-reduction-unit>

<sup>8</sup> <https://londonyouth.org/what-we-do/rise-up-youth-practitioners-leadership-programme/>

the development of a cohort of future leaders who better represent the communities they serve.

- London Youth also pro-actively facilitate access of unqualified youth workers to the training provided by St Giles Trust (including IAG training accredited to Level 3) which specifically addressed the gap between cultural competence and lived experience value and access to disciplinary skills development.
- An increased focus by London Youth on staff wellbeing. Akin to the advice sector, youth workers are subject to huge amounts of vicarious trauma, witnessing violent incidents is commonplace as well as many other traumatic episodes and lower level but sustained trauma over time. London Youth are in the process of developing a pooled resource to promote good mental health and resilience for staff in their member organisations.

## Appendix D: Response by ASA – Defining Social Welfare Law and Meaning of the Term Advice

### **Defining social welfare law**

The broad term ‘social welfare law’ is not a discrete class of law but rather refers to the areas of civil and administrative law which outline the rights, entitlements and protection offered to all members of a society in order to meet their basic needs. This area of law includes the means and mechanisms to challenge decisions made in meeting these (often by government or civil organisations). These rights are most commonly accessed by people with limited means and the issues presented frequently overlap between different areas of law. The areas of law generally included in this classification are:

- Welfare benefits: eligibility and entitlement, assessment and access to welfare benefits, income maximisation (which focuses on promoting the uptake of welfare benefits)
- Debt: advice and guidance on how to avoid debt and how to deal with it when it becomes a problem.
- Employment: rights at work, for example, around unfair dismissal, unfair treatment, withheld pay
- Housing: access to social housing, advice on housing rights and eviction, including around the management and condition of accommodation, access to assistance when facing or experiencing homelessness
- Immigration: the provision of advice on immigration issues, which is subject to its own regulatory framework: It is a criminal offence for a person to provide immigration advice or services in the UK unless their organisation is regulated by the Office of the Immigration Services Commissioner (OISC).
- Education: parents with grievances against local authorities/school governing bodies; issues relating to accessing special educational needs; support to study; free school meals, etc.
- Community care: social care, community support and services

Given that people experiencing problems in this area are likely to have very low incomes and that there is very limited access to legal aid in all but a few areas (eviction for example), the vast majority of advice in these areas are delivered by voluntary, third sector organisations or by civic services (such as Local authority welfare rights advisers). Collectively, these organisations have been known as the ‘advice sector’. More recently the term ‘access to justice sector’ has been used to encompass the voluntary advice services, the legal pro bono services and student law clinics.

The sector also distinguishes between services which are part of the ‘formal’ advice sector and those which fall outside this and are ‘informal’. The distinction for the formal sector is those organisations who identify as providing an advice service, who seek and receive funding to provide this service, and who carry indemnity insurance as protection for clients against wrong advice. Many of these services will hold membership of one of the advice networks (Law Centres Network, Citizens Advice, AdviceUK etc) and may also hold recognised quality assurance standards (Lexcel, Matrix or Advice Quality Standard). Those within the ‘informal sector’ will be providing advice as a small part of other services so therefore may not identify as an advice service. They may not seek or receive funding for this service or simply maybe unaware of the activity falling within the definition of advice. They are less likely to hold a quality mark and may not hold indemnity insurance. Such services are frequently small and community based.

The majority of staff delivering advice within both the formal and informal sectors are unpaid volunteers. Whilst there are many paid posts, the sector could not deliver the volume of advice without the support of the volunteers.

### **Meaning of the term ‘advice’**

Most people with legal issues falling within the definition of social welfare law (referred to by advice service as ‘clients’) would not necessarily recognise that their problem has a legal component. When seeking advice in these areas of law to resolve an issue, clients themselves are most likely to understand this as ‘looking for help with a problem’ (see Legal Needs Surveys definitions).

The term ‘advice’ in this context is used to refer to legal advice given in the areas of law referred to above as ‘social welfare law’. There is a distinction between information and guidance (i.e., giving a client a leaflet or signposting to further help) and advice; **the process of identifying the legal component of a client’s problem and applying the law to the client’s particular situation with a view to its resolution.** Whilst this practice is legal advice, most advice services are delivered by lay people with skills, knowledge and experience in social welfare law, although some services, such as law centres do employ trained and registered lawyers.

Within the advice sector, the terms ‘generalist’ and ‘specialist’ advice are used to indicate the breadth and depth of knowledge an advice service may offer. ‘Generalist’ advice refers to initial advice on a wide range of issues, delivered by well-trained lay people; specialist advice is in-depth legal advice in specified areas of law, often given by legally qualified advisers.

In broad terms, generalist advice services can identify legal issues and give clients the knowledge and guidance to resolve these and occasionally may take responsibility for moving the issue forward (case work); specialist advice organisations can undertake on going case work, as well as advocacy and representation. ‘Specialist advice services’ may also indicate services delivering advice to a specified client group with a particular combination and/or complexity of legal needs (for example, women, people with disabilities, students, migrant communities etc).

### **Regulation and Advice Services**

As most advice agencies employ lay people, the services will fall outside of most regulation. The exceptions are:

- those employing lawyers working in a legal capacity (covered by the Legal Services Board)
- those giving advice on immigration and asylum (must be registered with the Office of Immigration Services Commission)
- those giving financial advice in relation to advising on managing debts or money advice (must be registered with the Financial Conduct Authority)

There is no statutory basis for the provision of local advice centres. There are, however, two areas of law where local authorities are required to provide access to advice for their local populations:

- The Care Act 2014
- The Homelessness Reduction Act 2018

Local authorities discharge this duty in different ways and some to fund local advice providers which helps meet these requirements. Local authority funding still provides the backbone of support for advice services with other funding sought from a variety of sources including central government, trusts and foundations, The National Lottery Community Fund and the Legal Aid Agency.

**Providers of free social welfare legal advice**

<b>Advice Provider</b>	<b>Level of Social Welfare Legal Expertise</b>
Law Centres and Legal Aid Law Firms	HIGH
Pro Bono Sector	HIGH
Specialist (area of law) advice centres	HIGH
General advice centres (client group specific and general public)	MEDIUM
MP's surgeries	MEDIUM
Student legal clinics	MEDIUM
Other Not for Profit Organisations	LOW
Friends, relations and trusted helpers	LOW

**Lindsey Poole**

**26<sup>th</sup> January 2022**

## Appendix E: A community context to definition of advice

We have provided these reflections as a broader context definition of the contexts and principles underpinning advice. They reflect a pathways approach to meeting the skills gaps in the advice sector, by seeking to articulate the need for a common approach to recognised standards whilst acknowledging a broader encompassing of advice work skills and approaches

Advice seeks to ensure people are able to exercise their rights by managing and/or resolving their problems. It is particularly important for those individuals and communities that face the greatest disadvantages.

The following principles are presented as underpinning the widest discipline of advice provision:

1. Advice has at its core a social justice approach. It is concerned with the environment or the context within which legal work takes place, seeking to ensure that social issues are addressed effectively and in an appropriate way.
2. Advice services are accountable to the people they seek to serve and responsive to the needs of communities.
3. Advice provision is creative and strategic in the way it seeks solutions.

Within the context of these principles, the defence and assertion of the rights of individuals and communities is inherent in advice. So is the legal education and empowerment of individuals to self-advocate for their rights and develop their own agency. It is essential that accurate and holistically based advice provision is accessible at the earliest possible point in an individual's journey. This enables the best outcomes to be achieved and contributes to alleviating unnecessary demands on the more specialist part of the advice sector continuum. It recognises the need to develop clear pathways and a bridge between advice delivered as part of wider holistic approaches and a well-funded specialist legal advice community. Only a sector that is strong in both can effectively address disadvantage and inequality.

Advice on rights and the law is an essential part (but only a part) of a holistic approach to supporting people to combat inequality and disadvantage. It is not to be viewed as a standalone service, but essential provision in the context of wider health and social issues affecting communities.