

Advice Workforce Development Fund Programme

Learning from the first year, July 2024

Introduction

This paper summarises the learning from the first year of operation of initiatives designed to address workforce challenges for London’s social welfare advice sector. Advice Services Alliance was appointed Learning Partner for the collaborative Programme and has worked with the [eight funded partnerships](#), the [Programme steering group](#), [task and finish groups](#) and programme participants to gather and understand the learning.

Programme activity commenced in April 2023, though most partnerships really got going in autumn and winter 2023.

Partnership lead organisation(s)	Project commencement
Inclusion Barnet	April 2023
AdviceUK	July 2023
Citizens Advice Wandsworth/London Citizens Advice	
IRMO	
Law Centres Network	
Legal Advice Centre (University House)	September 2023
Money A+E / Rooted Finance	
Disability Law Service	November 2023

The learning reported here therefore covers the first 7-15 months of Programme activities. It is therefore *emerging* learning – it is too early to reach conclusions about many of the questions, outcomes and impacts that the Programme aims to address. Setting up the programmes took considerable time and effort for partnerships, so it may take longer than anticipated to get it right, and to set up the necessary support and training, for example.

The Programme involves almost 500 beneficiaries of training provision and development activity. The existing staff trained figure includes 275 people who may attend online training offered by Legal Advice Centre.

Apprentice Solicitors (SQE)	Trainee Solicitors (LPC training route)	New trainee advisers	Existing staff trained
18	3	46	397

A set of case studies – available [here](#) - telling the individual stories of programme participants has been assembled. These are instructive: they provide snapshot of people’s journeys into and through the advice sector workforce.

It is hoped that the learning will be of use to the wider advice sector, not only in London, but throughout the UK.

Programme Aims, Questions and Theory of Change

The Programme was designed to address workforce challenges that were identified in [Advising Londoners \(2020\)](#) and [Addressing the Skills Gap Within Advice Services \(2022\)](#). It aims to address three key questions:

- **What are the most effective ways to recruit and retain staff?**
- **What are the main factors contributing to staff development and progression?**
- **How can the lessons learnt from this work contribute to developing further solutions?**

A **Theory of Change** was constructed by the Learning Partner to provide a framework for learning – accessible via the programme’s website [here](#). This identified the **desired outcomes** of the programme to be:

- New opportunities to enter and progress within the sector.
- Enhanced diversity, representation and lived experience in the workforce.
- Equity-led and focused advice agencies able to recruit people with skills and experience needed.
- Equity-led agencies have increased influence on workforce systems.
- Tested approaches to advice traineeships and apprenticeships.
- Tested models and resources for good practice, accessible, inclusive recruitment, and retention.
- Tried and tested development and progression pathways.
- Enhanced capacity and capability within beneficiary organisations.
- Enhanced capability of individual participants.
- Enhanced knowledge of retention issues.
- Sustainable collaborations between advice agencies and community agencies.
- A body of learning and resources on advice workforce.

The **desired impacts** were assessed to be:

- Replicable and scalable workforce provisions that will be invested in, funded, and sustained.
- Improved supply, diversity, and quality of advice for Londoners.
- Improved reach of advice services.
- Systemic changes are made to support advice agencies to overcome workforce challenges.
- Resources and evidence to support further workforce initiatives.

Emerging Learning

What are we learning from the programme about effective ways to recruit and retain people and help them develop and progress? What does this tell us about the solutions being tested and further solutions that may be introduced?

A preface to this note is that when we talk about the advice sector workforce, we must be careful not to concentrate solely on adviser, caseworker, solicitor, and supervisor roles. Management, leadership, administrative and technical support roles are also an important part of the advice workforce. However, much of the programme activity is focused on client focused advice roles. We hope to learn, as the programme progresses, about issues relating to other roles – and management/leadership roles in particular.

More public and centralised information and marketing is needed about the advice sector, training, entry, and development opportunities.

The feedback from trainee and apprentice [interviews](#) and from Partnerships is that new workforce members are often not aware of the advice sector, what it does and the training opportunities and pathways it offers. Even those who have been in the advice sector workforce for some time may be unaware of training and development opportunities and pathways within the sector.

There is a lack of proactive work being done to attract people to the advice sector as employees or volunteers, outside of individual job or volunteering advertisements and the localised collaborations under this Programme. We have learned from speaking to new advice sector entrants about what they value about the sector: the opportunity to change lives, the more family-friendly working hours, the routes to qualification. These can compensate for lower pay levels, but the benefits are not being sold very well.

There is equally a deficit of action to make the existing advice sector workforce aware of opportunities to develop and progress, without leaving the sector. The risk that people might leave the sector is particularly acute in mid-career, when staff have reached a point where they are at the top of their grade and are looking for higher pay, new challenges, and more responsibility. A space where options for development and progression were set out may help to keep people within the sector (even if not in the agency they are currently working at).

There is no centralised location and marketing strategy that tells people about the advice sector, the type of jobs and volunteering opportunities it offers, what skills and experience is needed to get into it, where to start and how to progress. Sites like [Advice Jobs](#) lists positions available and information about AdviceUK training and qualification offers. [Rights Net](#), [Citizens Advice](#) and [Law Centres Network](#) websites also list advice sector job and volunteering opportunities. The [Institute of Money Advisers](#) and [National Association of Welfare Rights Advisers](#) provide great resources, training, qualifications, and peer networks for advice staff. But none of these spaces explain in accessible terms what the sector is about, the routes into it and how to progress within it.

Inter-agency collaboration aids understanding of workforce needs and best practice.

Collaborative work by agencies under the project has led to a good deal of sharing of good practice and different approaches to recruitment.

There are two partnerships within the Programme that are led by Deaf and Disabled People's Organisations (DDPOs) (Inclusion Barnet and Disability Law Service). These user led agencies have considerable expertise to share regarding the attraction, recruitment and retention of disabled people to advice sector roles. Disability Rights UK has produced a set of [useful recruitment and retention resources for \(D\)DPOs](#). DDPOs have found that advertising roles as suitable for people with long-term health conditions is important – not all people identify as disabled.

The DDPO resources and knowledge are useful for the whole advice sector. Many disabled people have lived experience of the welfare, housing, employment, and other systems that advice services deal with daily. Greater efforts to attract and accommodate disabled people by advice organisations could be beneficial for workforce growth and development, but also service delivery (knowledge, experience, empathy) and reach.

The IRMO led partnership has enabled ethnically diverse advice agencies to share practice around recruitment and learn from each other. However, aligning the recruitment systems of two or more agencies has been resource intensive. Joint recruitment can be beneficial, but the time needed to manage the process should not be under-estimated.

Community agency partnerships and community engagement can help to improve workforce diversity and representation of people with lived experience of advice issues.

We have also learnt from the programme that building a trusting relationship with a community partner (a community anchor organisation, faith agency etc.) is a real key to recruiting a diverse workforce with lived experience. There are good examples in the Programme of relationships that have enabled advice providers to improve diversity and lived experience within the workforce, like a Local Citizens Advice partnering with a carers' organisation to target carers and understand their employment needs.

Creating less formalised ways to get involved in advice can generate interest in the sector. Organisations that are embedded in local communities can get community members engaged with their work in ways that do not require extensive training (i.e., non-advice roles): creating ways to get people in communities involved who may not have thought about advice as a job option. Spending time in communities to engage, get to where people are in community settings, and talk about advice can be a good way of attracting new people with lived experience to the advice sector.

Generally, the feedback from partnerships is that they have achieved their objective of enhancing diversity, representation and lived experience in the advice workforce because of the collaborative approach.

The importance of flexibility, accessibility, and reasonable adjustments.

Partnerships have observed that flexibility in terms of training offers and working/attendance hours is very important to attract people with lived experience, caring responsibilities and disabled people. Making reasonable adjustments and ensuring [Access to Work](#) support is available is vital.

To make training accessible for a range of people in different circumstances, training provision needs to be flexible: for example, short, bite-sized sessions at flexible times to fit around childcare and caring responsibilities. Long courses, with self-study requirements can be challenging for some participants. Less intensive, entry-level training with longer lead-in times may increase accessibility.

The Money A+E/Rooted Finance Partnership wanted to use this Programme to train people with lived experience and work with trusted community intermediaries to build their capacity and capability. What it has learnt is that to do that, flexibility and an iterative approach is needed. It was acknowledged early on that the funding made available under the Programme for community agencies would not cover salaries, so the participants in the training are all volunteers. To enable them to participate, the pace and timing of the training had to be adjusted. It is rare to have the ability to take a relaxed approach to training timescales. The organisations normally have contractual/funding commitments to hit and need people to be trained and up to speed quickly. But being able to tailor programmes to the needs of volunteers helps to address structural barriers, and this helps to bring people with lived experience into advice. Volunteers come with varied experience and different circumstances, which need to be accommodated.

Existing training course content may not be relevant for all communities. Advisers who will be working in some settings, for example, may need more knowledge of benefits rules for people subject to immigration control, or discrimination law related to disability, than advisers in other settings.

AdviceUK has found that making its Learning to Advise course suitable for some disabled people is requiring a lot of adjustments – it has liaised extensively with Inclusion London about this. All training providers need to build in access and communication support into their programmes to make them accessible for disabled people and people from diverse communities.

In interviewees with staff employed under the programme, the subject of reasonable adjustments for disabled people, and Access to Work support came up. The experiences reported were varied - some had great support from Access to Work, others were 'shocked' at the difficulties in applying, and delays etc. There is an opportunity for more sharing between the Partnerships on how to best approach Access to Work applications and the duty to make reasonable adjustments for both employers and service providers.

A further issue with Access to Work is that volunteers do not benefit from the rights in the Employment Rights Act or the Equality Act. Volunteers cannot get Access to Work funding

for reasonable adjustments. It would be helpful to consider the creation of a fund to cover some of the costs of reasonable adjustments for disabled volunteers in the advice sector.

Some training participants want certification: something to show for undertaking the course. It is also important that training provides participants with transferrable skills and knowledge – to work in other advice sector positions or even outside the advice sector.

Purchasing courses for in-house delivery has enabled partnerships to offer places to staff and volunteers who have not been engaged under the AWDF programme – adding value to the programme.

Peer support networks are useful to build an advice sector community.

The Programme includes the creation of peer support cohorts for trainees and apprentices. These are proving to be successful. The [Justice First Fellowship programme](#) has used this networking approach successfully for several years. Under the advice workforce Programme, Law Centres Network has created a peer support group that enables apprentices to share experiences and insights. They are important they are for newly promoted or newly recruited casework supervisors and indeed caseworkers in general. They are especially important for small advice providers where there is limited support in-house. The groups convey a sense of being part of an advice sector community across agencies and are an essential way for advice workers to feel supported and learn together.

Some interesting questions are emerging. How similar do the 'peers' need to be for them all to get maximum value and support from this model? On the other hand, are there advantages in having a range of skills and levels of experience amongst the 'peers'?

Sustainability is in question.

A major issue is how the trainee posts can turn into sustainable advice posts. The Programme has funded several traineeships and apprenticeships that are time limited. There are unanswered questions about what happens when the training is completed and/or the funding ends. Retaining people in the advice sector obviously requires follow-on positions to be available. For example, funders may need to look at a minimum funding of trainee posts for two years followed by increased funding to allow people to develop into casework roles.

Importance of infrastructure and centralised resources for workforce initiatives.

The Programme has enabled the provision of centralised coordination of workforce initiatives. For example, Law Centres Network is coordinating the provision of seven apprenticeships for five Law Centres and University House Legal Advice Centres is supporting apprenticeships for two local community agencies. Coordinating agencies can liaise with law firms to donate some of their apprenticeship levy and with law schools to provide courses and improve course content and arrangements.

Advice UK is providing its Learning to Advise course for several Partnerships. And local networks like Tower Hamlets Community Advice Network, are making it possible for local agencies to share opportunities for recruitment and training of staff and volunteers.

Without this infrastructure, individual advice providers may have struggled to create and to manage/sustain the training and apprenticeship offers.

AdviceUK has also noted the need for a pool of trainers and supervisors – people with necessary experience and skills – to run the training programmes, coordinate and provide the peer support etc. The development of such a pool could provide opportunities for more experienced advice sector staff to develop and progress - possibly alongside every-day advice work – on a part-time or freelance basis.

IRMO has identified a need for a standardised needs assessment for developing and curating an advice training programme. This could be another resource that could be developed to support the sector's workforce development.

Collaboration and organisational capacity building.

The Programme has placed an emphasis on collaboration:

- Between organisations that have come together to form partnerships.
- Between the partnerships and community organisations. These include community anchors, foodbanks, faith agencies, mental health and sports groups and women's organisations.
- Between the partnerships, funders, and stakeholders collectively: events are being hosted to bring people together to share learning: a steering group and learning events.

Partnerships play a crucial role in the success of the programme. Collaboration between agencies and sectors should allow for the sharing of resources, expertise, and best practices, ultimately benefiting both staff and service recipients.

The Programme includes work with community-based/anchor organisations to increase workforce diversity. Some Partnerships are seeking to train staff/volunteers that will be based in the community organisations to provide an advice service. Other Partnerships are simply working with community agencies to target members of the communities they serve.

Partnerships have faced significant challenges around the organisational capacity and stability of the smaller, community advice organisations. Many are not able to take on and support new advice staff without capacity building support from the Partnership. They may lack quality assurance systems, supervision experience/capacity and case management systems. AdviceUK has found that many organisations working in this space are facing significant capacity challenges, like changes to their leadership. Advice UK noted that 6 CEOs have left the 11 organisations it is working with under its Cornerstone Fund project.

Some community organisations being worked with under the Programme are not set up as advice providers but are regularly called on to signpost members of their community/service users to advice services or provide welfare information. The relationship that the Programme is building with them is opening options for the agencies to ensure advice is available for their community/users and encouraging members of their communities to learn more about social welfare advice. The Money A+E/Rooted Finance Partnership, for

example, is working with the Thai Boxing Fighters Academy. The organisation provides health and wellbeing support for local people. An Academy volunteer is one of the most enthusiastic and committed members of Money A+E's training programme.

Advice organisations with less developed links with community partners need time to develop a platform of trust, whereon opportunities to train staff and volunteers can be built. Some partnerships have been surprised at the barriers to collaborative working with other agencies that arise from different workplace cultures, methods of working and skill sets.

The Programme's organisational capacity building task and finish group is looking at this issue.

Funding length and levels

Partnerships have found that the short-term nature of the Programme funding and the fact that most of them had to scale back their proposed activity has hampered their effectiveness. Ironically, under a programme that is testing approaches to workforce issues, when we know that short-term funding is a factor in recruitment and retention, the partnerships are facing that very problem. Some partnerships are already fearing the loss of new personnel unless funding is extended soon.

Partnerships have also found that rising costs are not being covered by Programme grants. The 10% rise in the London Living Wage, announced in autumn 2023, has squeezed some Partnership budgets.

Early recommendations

The programme should prioritise the funding and development of a 'Work in Advice' website and/or social media channels as part of an advice sector marketing strategy. This could provide central information about the advice sector and what it does, why you might want to work in advice, the jobs, and roles you can do, the skills and experience you'll need and the routes in – training you can do, volunteering, apprenticeships, where jobs are advertised etc. It could also be for people who are already in the sector but who wish to develop/progress. The site/resources/social, media activity should be in a neutral location – not part of or promoting any one advice sector brand. The Programme steering group should consider how to take this forward at the earliest opportunity. Ideally, it should be co-produced with the advice sector's workforce, including Programme beneficiaries.

The programme should bring participants (trainees, apprentices) together. A learning event is being planned for October 2024 that will involve participants – hearing about their experience directly and providing an opportunity to share the opportunities that existing across the programme.

Recruitment best practice tips and resources should be made available on the programme website and shared at Programme learning events. These should include guidance on recruiting disabled people and carers, for example.

Programme funding: funders should make early decisions regarding Programme funding extensions and should consider uplifts to current funding levels to cover increased costs.