

## **Afternoon panel discussion: Recruitment, Retention, and Advice Workforce Development**

**Chair: Raj Kapoor** (CEO, Brent Citizens Advice)

**Panellists: Eddie Coppinger** (CEO, University House), **Emma Triggs** (Projects & Partnerships Manager, Rooted Finance), **Tracey Lazard** (CEO, Inclusion London) **Julie Bishop** (Director, Law Centres Network)

### **Session Reflections, key takeaways:**

- Eddie Coppinger: Taken by the passion in the room. An advice strategy needs to reach out and connect with all sectors of London, especially the wellbeing and health sector.
- Julie Bishop: Key takeaway was about the similarity of our challenges in Pay & Conditions. We are all trying individually to solve common problems, conferences like this are a good opportunity to use hive thinking to come up with practical solutions.
- Emma Triggs: The importance of community-based advice providers and their contribution to the sector. Propel funding programme invests in the sector, and training and development programmes provide a chance to bring in new people and more diverse voices to the sector, rooted in the communities we support.
- Tracey Lazard: Jo Hickman's comments about trust, and the importance of belonging and achieving goals is a great summary of what user-led community organisations can bring. Propel has given a chance to unpack and explore this and develop further.

### **Q1: Grow Your Own Talent**

***How are 'grow your own' initiatives—like the ones we've seen through this programme—helping to transform the advice sector? Why does this matter for its future sustainability?***

- Emma: bringing more diversity into the sector actively cultivates more advisors. Bringing in individuals with lived experience helps with cultural understanding which helps break down barriers. Clients value this and it highlights the potential the community has. People have a lot of potential and empathy to bring to the sector. Retention in the advice sector is a challenge but GYO gives a chance to improve things. Mentoring and clear training pathways all give a commitment from the sector.
- Tracey: 6 trainee roles under Propel, all have now gone on to be caseworkers. We also supported 5 caseworkers to become supervisors. This approach works. It makes business sense as recruitment is difficult, but this also allowed us to flip the power dynamic; disabled people becoming advisors using their own experience rather than

passive recipients of advice. We need Propel style resources as a standard funding type.

- Julie: GYO is not just about attracting younger people to the sector, but thinking about staff feeling valued and belonging, supporting people in their careers to develop further. A new generation of people into the sector is positive as they bring challenge, enthusiasm, and new ideas. As a sector we cannot get too comfortable with how long we have been here or what we have tried before, but what is coming over the next 50 years.

## ***Q2: Supervision and Staff Development***

***What role do effective supervision mechanisms—whether technical, managerial, or even clinical—play in retaining and developing staff? What has worked well in your experience, and what barriers have you faced?***

- Eddie: access to appropriate supervision is a key barrier to developing the welfare advisors of tomorrow. Sustainability of workforce also impacts your advice offer and what you are able to bid for. An example of conversations with a local Citizens Advice that was hemorrhaging bright law student volunteers. Nowadays, you need to provide a clear supervision structure to support people, as law students are aware of things like qualifying work experience and want to accrue this as it has real world value. As a sector, we need to put mechanisms in place in order to appropriately recognise volunteering time. This needs to be signed off by a qualified supervisor – this removes a barrier to further progression.
- Julie: Supervision is a key piece of work, it will take a number of years for GYOs to grow and move into supervising roles. This middle supervision area is what we struggle with, so we need to develop supervisor capacity too. Greater use of AI means supervision is more critical than ever, it is not just about the quality of work but also accuracy.

## ***Q3: Pay, Conditions & Cultural Change***

***In your view, how might the current work on pay and conditions contribute not just to a London-wide advice strategy, but also to broader cultural change within the sector?***

- Julie: How can you have a strategy without a workforce? It is critical to strategy implementation. We have assumed the key question is that we do not pay enough, but Ben Hickman & Jo Hickman's work shows this is more complex. One finding was that 89% of people like their job and are happy, but there are things and stressors alongside pay that make people stay or leave. While people are happy in jobs, almost half are unhappy about pay, or stressed about workload, lack of time to take training or annual leave. Understanding the combination and intersection of those things is what enables us to build and develop our workforce. This work around P&C gives us a tool to help try and ground a strategy in what is achievable.

- We need to let people know this is a great sector to work in. The more people know about that, the more people who will want to work in the sector. This is something that can reside within a London-wide advice strategy.

**Audience Q:** *One of the things we find a challenge is supervision. We have committed to GYO (including resources), but there are challenges to training people who learn in a different way to how we learnt. How do we supervise adequately, especially where our traditional methods do not appear to be working?*

- Eddie: There is a cultural problem in the sector with supervision. Colleagues may not want more responsibility of supervision, but it can be seen as an opportunity. University House does a lot of supervision, including remotely in Devon and Cornwall. There is great enjoyment in supporting people to develop and progress. In trade unions, the organising culture means you need to bring people on board and develop them appropriately. The advice sector needs to properly embrace supervision.
- Julie: Is your question really that one of the challenges of GYO is supervision, particularly in Law Centres, is that previously a trainee may be arriving with some skill from a law degree or LPC conversion, and now training routes mean people can arrive with much lower skill set understanding of law?

**Audience:** *Yes, we have trainees who are students coming from courses we do not know anything about. They are far more prepared to challenge things. In this sector, you have to learn hands on and learn from mistakes, but this cohort is very different and may not be as equipped at taking criticism or reflections on improvement opportunities.*

#### **Q4: Workforce Priorities in Strategy**

**Looking ahead, how prominent should workforce issues be within any future pan-London strategy for advice services? What risks do we face if they're not prioritised?**

- Tracey: Everything shared today needs to be non-negotiable core funded practice. Peer support for example, offered properly to give reflection and an open trusted space, is critical alongside training, decent pay, funded capacity.
- There is huge importance of advice providers reflecting the communities they serve. The sector needs support to remove barriers and become more inclusive as an employer. They are all important; reflecting on 30 years in the sector thinking of DDPOs with part time solo advice workers in a potentially damaging, dangerous setup. As a sector we need to set minimum standards and non-negotiables, and tell funders that we need them to fund it.

#### **Q5: Role of Funders and Commissioners**

**What responsibility do funders and commissioners have in enabling a well-supported, properly resourced advice workforce? What more could they be doing?**

- Emma: Workforce development under AWDF is at risk without long term funding. A sustainable workforce is crucial for the development of the sector. Opening up a project like Propel does not work if it is going to stop; this removes access to support for the communities who have grown to expect it.
- Eddie: Benchmarking is needed, certain roles cost certain amounts and we need to be clear about what the realistic cost of roles is.
- Julie: Funders can include conditions in their funding contract about London Living Wage to nudge people (although funders should not be policing the sector, this would just be a reminder for organisations). For years we have talked about full cost recovery (FCR), but in reality if you put more than 5% in a funding application then it is not accepted. LCN's true FCR is 30%, so how do you fundraise for your own work as well as the basic delivery? FCR is at minimum 20% on top of salary. Funding FCR would provide accountability for funders, this would allow them to achieve outcomes in a way that is possible for the sector to healthily contribute to. Maybe it means funding fewer organisations, but funding them well.

**Audience comment:** *What about the government? We should be campaigning, looking to them for funding and change, not just asking funders.*

**Audience comment:** *What about law firms? Can they share resources and support for our sector? E.g. Bindmans setting up a 10% fund is great, can others be encouraged to do the same? Pay and Conditions is not new as an issue in the sector, so what can we do so in 10 years' time we look back and see we did something tangible, for example around benchmarking.*

- Tracey: funders can be explicit about what they think is an acceptable wage, and should challenge where roles look like they are not funded correctly. It is critical to explore this.

**Audience comment:** *We have an aging advice sector, who is going to come and be the next generation of advisors? There are very few people in the sector under 30. What can we do to encourage the next generation of advisors, legal roles, and others? How do we bring the next generation in?*

- Eddie: It all comes back to supervision; putting together appropriate structures so we can engage with law students. They are the social welfare lawyers of tomorrow and are currently an underused resource
- Tracey: Research undertaken showed us that disabled people were interested in being advisors, but felt put off or excluded based on their previous experiences. Targeted recruitment adverts clearly stating that organisations are actively seeking disabled people to apply, and that training and support would be provided is needed. Feeling part of the social movement too is really attractive, we need to show as a sector how we use casework for influencing policy and wider change.

- Emma: The advice sector would benefit from a promotional campaign so people know what roles are available in the sector and where they could go. There is an evolution of different roles, people may be interested to come into the sector or move within it. A specific campaign or advertising movement is needed.

***Audience comment:*** Social justice advocates e.g students from sociology, history, and other fields, have a strong moral connection with advice. We should consider engaging more with them too. Law students may be more likely to compare opportunities to city firms, but other disciplines may have a strong connection with social justice and advice and want to be in the sector.