Advice Workforce Development Programme: One year in

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Authorship and acknowledgements

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Contents

Introduction

The Advice Workforce Development Programme (AWDP) was launched in 2023. This was after Propel funders, including London Legal Support Trust, City Bridge Foundation, Trust for London and the National Lottery Community Fund, had come together with sector experts aiming to respond to advice workforce challenges in London, as outlined in two key pieces of research, Advising Londoners (ASA, 2020), and Addressing Skills Gap (LLST, 2022).

The AWDP supports training and development initiatives to attract new people into the advice sector and for existing staff to have clear progression pathways. This is funded through the Propel initiative.

In addition, three task and finish groups, made up of funders and sector leaders, were set up to explore particular advice workforce challenges more deeply:
- Pay & Conditions
- Building Organisational Capacity
- Developing a Pan-London Strategy[1]

A steering group oversees the strategic direction of the AWDP, made up of 20 organisations representing a variety of stakeholders including delivery organisations, funders membership bodies and local government.

The ambition for the AWDP is that it will lead to stronger, more sustainable advice services in London, through a combination of direct grants and creating a new infrastructure to support cross-sector working (the steering group and task and finish groups). The Institute for Voluntary Action Research (IVAR) has been asked to focus on the latter[2] (learning around creating a new infrastructure) and explore the extent to which the AWDP model is contributing to outcomes such as: better decision making; better quality of solution; greater understanding of different actors in the system; and opportunities for wider, more diverse participation in design and decision-making.

This report summarises insights from interviews with 12 people, 6 members of the three task and finish groups and 6 members of the steering group about their experiences of the AWDP to date, one year into this work. Task and finish group members and steering group members are referred to collectively as 'members' unless otherwise stated.

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[1] There is also a group looking at the apprenticeship levy. This was not included as part of this work.
[2] The impact of the Propel funded work (Robust Safety Net grants) is being evaluated separately by the Advice Services Alliance.

How it's going

Overall, the work of the steering group and task and finish groups was felt to be going well and had developed at the right pace. It was felt the funders involved in the AWDP were beginning to appreciate the difficulty of advice services and the complexity of individual organisations as a result of their involvement. Members were happy and excited to see where the work goes. All but one of the respondents felt being involved was a good use of their time:

> *Like all programs, partnerships and collaborations, it takes time to do this. It takes time to develop relationships.*

> *The task-focussed nature … has helped to break down a very large problem into more bitesized chunks that are easier to address.*

> *This project is unique and feels like the only space in the sector that involves so many voices and is so solutions focussed.*

The greater focus to date, as might be expected in year one, has been on establishing the structures and working practices of the AWDP. Particular attention has been paid to creating inclusive and safe spaces that help to build and strengthen cross-sector relationships.

Whilst it is potentially too early to tell the extent to which the AWDP is progressing towards intended aims such as 'better decision making', some members did feel they had a greater understanding of different actors in the system and could see the potential that the AWDP offers to create more opportunities for co-designing solutions.

Cross-sector expertise

The steering group and task and finish groups are made up of funders and advice sector leaders (some of whom are also Propel grantees). All are recompensed for their time: task and finish group members for their individual time to attend, and steering group members get an organisation-level fee.

Overall, the cross-sector nature of these groups was welcomed by both parties. It was felt that the spaces created allow for honest and transparent conversations about the challenges of working in the sector:

> *As funders, this is not always something they are privy to, and it has been extremely helpful for them to sit back and listen to experts.*

> *Funders might not have fully appreciated the assumptions and complexity of doing advice workforce development.*

At the same time, a desire was expressed by sector leaders for more two-way conversations, feeling that sometimes funders only listened. Whilst this might be a

deliberate act in some cases, with funders wanting to preference the voice and experiences of sector leaders, it could end up having the opposite effect:

We feel like we're subject to a yearlong interview.

Some voices are never heard - some funders have good intentions but never say anything - they sit and listen. It's weird if people are just there and not contributing.

For some funded organisations this can present a real risk, if their funders are in the room, or they are worried about jeopardising future opportunities: *'I am exposing practices that may be judged by the funders'.* This could result in members feeling that they can't openly raise important issues.

Where sector leads asked to have conversations about funding challenges, there was a frustration that these didn't feel constructive, *'[Funders] just explain to us why they can't'.* There was a request, particularly by steering group members, that funders should be more open about how they see things and the rationale behind their thinking.

Strengthening funders' insight into the advice sector and giving advice sector leads greater insight into funding challenges and opportunities is not the end goal of the AWDP. However, it is an essential foundation for the conversations that need to follow. As is the case with any work happening in collaboration, it is only through understanding each other's contexts and motivations and being able to stand in each other's shoes that it becomes possible to identify the common ground.

Creating inclusive spaces

In general, it was felt the steering group and task and finish groups were inclusive and representative of the sector. All but one of the respondents felt their expertise was being valued and the meetings were a good use of their time: *'If we achieve what we have set out to do, then definitely'.*

There was a good mix of voices in the room that represent various aspects of the advice sector, ranging from the service delivery to funders. Words used to describe the experience were:
- Valued
- Listen to
- Respected
- Everyone contributes
- Collaborative
- Brave

The sessions were well-run and supported inclusion. Examples given included:
- **Chairing of discussions:** *'Everyone is strong in having an opinion and the Chairs work hard to make sure everyone has something to say'.*
- **A range of meeting and discussion options are provided:** For example, meetings are always run as hybrid; smaller group discussions within larger meetings; members have the opportunity to give feedback/share their views outside of larger group meetings if they wish to do so in confidence.

- **Lack of hierarchy:** A couple of members explicitly noted how non-hierarchical the groups they were involved in felt. *'It doesn't feel like there's a hierarchy … The space feels ego-less'*.
- **Brave spaces:** *'People can say what they think, people can disagree with each other. People around the table are very reflective and opinions change'*.

The fact that a range of different stakeholders are involved – funders, local authorities, public bodies, infrastructure bodies, large and small advice agencies – was also seen as a sign of inclusion.

London Legal Support Trust were unanimously praised for their role in supporting the smooth-running of all meetings, as good listeners and *'good at pointing people in the right direction'*.

Whilst the majority felt able to participate fully and openly, one member noted that they had felt alienated due to being *'one of the only community organisations, surrounded by multi-million trusts, organisations, individuals'*, many of whom already knew each other. This made them feel their presence was *'tokenistic'* and that their input as a leader of a grassroots, ethnicity-specific organisation was not valued or listened to, despite bringing decades of experience of the advice sector.

Although there was awareness of potential power dynamics within the steering group in particular, half of the steering group members we spoke to felt that at the moment the power still lay with the funders and larger national organisations. This was in part to do with some of the steering group's ways of working. For example, funders chose who should be on the steering group and there was no open recruitment.

Several of the people interviewed also recognised that there were specific challenges faced by advice sector leaders (and small charities in general) which can hamper their ability to engage. This included the volume of work this approach created (including outside of formal meetings). They recognised that this time was not fully accounted for and that the issue of capacity is ongoing especially for smaller advice services:

> *Inevitably there is a structure and lots of meetings. LLST pay for my time, but it is still a structure that involves a lot of investment of time from Advice Service Managers who are also trying to run advice services when they have operational challenges left, right and centre.*

It was recognised that smaller organisations with less capacity might struggle to engage and feel even more isolated in this space. Or if there were able to give up time it was, to some degree, at the cost of their own organisation's development:

> *They are time consuming events, 6 hours … it's a lot of my time that does not benefit my organisation.*

> *Paying for involvement only deals with superficial costs.*

Building and strengthening networks

Whilst members felt that their involvement in the AWDP hadn't *yet* had a tangible influence on decisions and practices within their organisations, they could see the potential for it to do so going forwards and some could see how connections they or others had built were the first step towards this. For example:

- Bringing insights from their involvement in AWDP back into their organisation. *'I have taken back the things I have heard to my team so we can work on things internally'*.
- Connecting with groups they hoped to work with in the future.
- Supporting the London Advice Network to become its own consortium and new charity for London Citizens Advice Bureaux (CAB).
- One infrastructure organisation explained how the work has *'strengthened relationships with our members'* and supported them with *'reaching new communities'*.

The model

In general, the steering groups and task and finish groups are working well at this current stage. The work is exciting and the way of working modelled by these groups could really influence practice in the sector.

Aspects highlighted as good were:
- There is a *'clear delegation of authority'*.
- Having three categories helps to streamline the work as there is a lot to tackle.
- Having a Chair and a Terms of Reference provides a clear framework.
- The coordination and administrative role played by LLST.
- Payment for people's time and expertise.
- Co-production/inclusive environment.

The main aspects of the model that members are keen to keep under review are the frequency and nature of discussions, and communications and preparatory work in between meetings. The general feedback was to be extremely considered about what members are being asked to give their time to, and transparent about the amount of time tasks will take. Most felt that a good balance would be to meet for 1.5-2 hours every quarter, with these meetings and other interactions kept under regular review. For example, if the agenda warrants a deeper discussion on an item, then extending the meeting to three hours occasionally would be ok.

Members were keen to retain the hybrid option for meetings. One suggestion was to hold in-person meetings in community organisation venues. For online meetings, one participant requested the use of Zoom over Teams because the former is more accessible to disabled people.

Ambitions for the future

Long-term, members felt this work had the potential to transform and create a more resilient advice sector in London (and beyond) by:

- Supporting systems change, where the advice sector is functioning better, and advice is given in a much more holistic way. *'Make the sector more fit for purpose'.*
- Influencing how the advice sector is building its workforce capacity.
- Supporting a *'genuine change in conditions'* – *'You can change the way you treat your staff. You can do something about the attitude of managers'.*
- Informing the work of other structures (such as Integrated Care Boards).

Influencing funders and funding practices

In its first year, it seems that the majority of detailed conversations about future ambitions have been focused on influencing funding and funder practices. This is perhaps not surprising given the unique make-up of the task and finish groups and steering groups; and the fact that there is not enough funding for advice services, in respect to demand in the current funding landscape. Members spoke about the following in relation to funders and funding:

Educate funders about the importance of advice

Creating a better understanding of what a healthy, sustainable and good quality advice sector needs. A need for funders to understand that *'advice is a gateway to accessing services'* and as a result often *'goes under the radar, not as sexy as other areas'*. Included in this is helping funders (including public bodies) see the benefits to themof a strong advice sector, e.g. cost saved down the line. This aligns with wider narratives and evidence around prevention (especially in health) and cost savings.

The importance of full cost recovery if we are serious about tackling pay and conditions

Several members talked about their experience ofstruggling to recover full costs for the delivery of a service or activity, and the impact of this on staff retention and/or wider organisational sustainability. For example, the salary of a post might be covered but no on-costs such as training, sick pay, admin support, IT, policy and comms, management of service, etc. It was estimated a full-time worker currently costs £55k, funders are paying around £45k leaving a £10k shortfall.

One person noted that while their organisation has more income than ever before – because of high costs and complex needs they were at risk of closing for the first time in their history: *'I've been in the service for 30 years and it's the worst time for it'*.

Reduce administrative burden

For example, encouraging collaboration amongst funders to help reduce situations such as multiple variations of the same grant report:

> *'We need to collaborate if we are to ensure we are funding effectively and not working in silos e.g. the way we do core funding or monitoring, easing the burden of this on smaller groups.'*
> *– Funder*

Better align funding practices with delivery timelines

It takes time to recruit and train good quality advisors: *'We are taking on people as paid staff that a few years ago we would not have. People are having to learn on the job'*. The lack of access to skilled, experienced staff means it takes longer to deal with clients with complex issues – so organisations can't meet funder expectations if they set unrealistic targets of how many clients we should see a day.

Get more support to smaller, grassroots organisations

There was an ambition to improve funding into the advice sector generally so that it is more strategic and aligned. However, getting more support to smaller grassroots organisations is especially important: *'More strategic advice interventions that are more about grassroots organisations'*.

To do this, funding systems need to be reviewed. For example, ensuring they are not unintentionally favouring larger organisations who have fundraising functions or roles and know how to *'play the game'*.

Whilst the intention exists within the AWDP to prioritise smaller organisations, one member felt that there is currently a lack of understanding of the role of small, specialist advice organisations within the steering group:

> *There are lots of excellent people, experienced people, but I am struggling to see how it [AWDP] applies to community organisations who are very small and very specific to particular ethnic groups, groups who are just about managing.*

Another member felt confident that this work will support *'general advice clientele'* but felt more time was needed to see if it would impact people seeking advice who also experience various forms of marginalisation.

Ideas for improvement

Going forwards, members talked about how they thought the AWDP model of collaborative working could be strengthened.

Give everyone a better overview of the work

A few members doubt whether everyone in the steering group really understands all the different strands of this work:

> *I am unsure if everyone can connect the dots between the task and finish groups and is aware of just how much work is taking place.*
>
> *It (the structure) is still quite confusing. People are still struggling to get their head around it. There are always a few people who don't quite understand it.*

In this context, gaining a stronger understanding of the wider picture and how all of the various groups connect would be beneficial. One person noted they had requested a diagram and map to better understand how all the work fits in together. *'It is working but it is very complex.'* Other suggestions included having a project management tool with an overview of the project; or having an annual gathering of everyone to explore the connections between the different groups and work they are progressing (to ensure complementarity and avoid duplication).

Have regular mission moments

As well as good induction, there would be benefit in having regular mission moments at the top of each meeting (or every other meeting) where someone reminds the people in the room why this work is so important. This would help to avoid mission drift, keep the conversation at a strategic level, and help to enable grassroots voices to be more present.

Involve more voices

It was noted that the '*voice of users'* was not well represented, and members should find ways to bring this in more directly. Likewise greater, meaningful input from grassroots organisations would enable the work to be more reflective of the reality being faced on the ground: *'They are the life blood of the sector and we need to give them a bigger space to hear their issues'*.

Members were keen to involve the wider advice sector to give the work more gravitas. A suggestion was to run some seminars or roundtables. It was noted that faith and women's organisations are not currently represented. Another suggestion was to do a mapping exercise to help current AWDP members get a better understanding of *'the ecosystem of advice'* and use this to help identify the voices that are missing.

Certain key voices were felt to be missing within specific task and finish groups as well, for example, not having someone from CAB in the Pay and Conditions group.

Be more creative in the way we harness people's expertise

To gather more nuanced insights from members on the topics they want to discuss, members thought a more dynamic approach should be considered. For example, providing training on certain research methods to each of the groups, that could help them apply the right approach to addressing the questions they have.

With smaller organisations – where the structure and volume of work in and outside of meeting can, in effect, exclude – suggestions made were:

- Meet small organisations where they are, instead of expecting them to come to us.
- Trial a breakfast/lunch meeting to see if that supports engagement.
- Hold more meetings in community venues.
- Provide space for smaller organisations to meet each other (without the larger, better-funded organisations) so they can share their experiences more openly.
- More facilitated conversations to ensure people are more comfortable in the large group space.
- Ask for contributions in writing. *'My involvement has been modest, but if there was need or an invitation to put something in writing, I would be happy to do so'*.

One person felt the steering group function could be more accurately reflected in the Terms of Reference. They felt the steering group was not yet steering activities and was more of space to hear from everyone/share information.They wondered if there was a better way to feedback from the task and finish groups to the steering group.

Don't spread yourself too thinly

While it was noted, *'maybe it's growing pains'*, there was a feeling by one person that perhaps the groups were taking on too much and *'spreading ourselves too thinly'*, resulting in their impact being diluted. For example, conversations about workforce capacity were shifting into conversations about general capacity. This was something to guard against.

Determine who is the primary audience for this work

A couple of people noted that it was as yet unclear who the audience is for this work. There needs to be common agreement on who is the primary audience of this work – who are we seeking to influence, e.g. health/local authorities etc. This was quite important to help keep the focus.

Keep power dynamics in check

As noted above, people are mindful of power dynamics but more could still be done to create a more equal space:

- Acknowledge the power held by the funders and larger more wealthy organisations and the imbalance that exists. Proactively think about how this can be used to

benefit grassroots organisations. *'Many of the steering group members are funders and they could make real concrete steps to improving the conditions for grassroots organisations.'*

- Think about how small, specialist organisations are being brought into this space.
- Ensure the agenda does not prioritise the needs of larger organisations over grassroots ones, addressing the inequality that exists rather than perpetuating it. *'Don't mistake open consultation with co-production'*.
- Rethink how to recompense those sector leaders contributing as individuals.
- Hold more of the meetings in community venues.
- Name racism as an issue that impacts on funding advice work and tackle this head on.

Issues of power felt more present in the steering group than the task and finish groups.

Recruit openly

Given the observation by one funder that the sector leaders involved in this work were chosen by the funders, we recommend that all future roles are openly recruited and have clear job descriptions and time commitment required – what the work will cover and what it will not cover; so people fully understand what they are committing to.

Create a portal or website on advice work

One person felt there should be a fourth task and finish group whose role would be to establish an advice workforce website or landing page – for people to find out about the advice sector, how to get into it, vacancies, training, etc.

Concluding remarks and next steps

The first year of the Advice Workforce Development Programme (AWDP) has been spent getting the set-up right. This includes establishing the structures, getting to know one another and determining scope.

The way that both the steering group and task and finish groups have been constructed, made up of funders and a range of sector experts, is recognised as a unique opportunity to co-produce an approach. The different priorities, perspectives and work cultures around the table has meant that a lot of the first year has been spent unpacking assumptions and coming to a better understanding of each other's sectors and organisations. However, the majority of those involved have felt heard and a clearer understanding of the collective motivations, insight and experience within these groups has been established. Some members have also begun to build new and strengthened relationships either within or across sectors through their involvement in the AWDP.

Most members have found these spaces to be inclusive, enabling them to be themselves, to say what they think and surface contradictory experiences:

> *The experiences shared in the group are hard to listen to and the problems that are being identified are uncomfortable, but necessary to address.*

Having clear terms of reference, good chairing and centralised administrative support has enabled these spaces to be constructive and supported them to move iteratively, meeting by meeting, to a clearer focus.

While most members are keen to continue their engagement into year two and are excited by the possibility of what could be achieved, some members encountered barriers to being able to fully contribute. For example, advice sector leads feeling like they were being *'interviewed'* at times and that conversations with funders were not always two-way. The power dynamics present within some groups had also led to some members not feeling comfortable to speak freely and openly. This was felt to be most prevalent within the steering group, maybe because of the number of funders represented within this group, the combination of large and small organisations, and the fact that a proportion of the group had strong pre-established relationships. Members fed back how they thought group structures and processes can be improved. This included creating strategic alignment between the different strands and supporting an even greater diversity of voices. For example, involving smaller grassroots advice providers and those with lived experience.

The first year has enabled the groups to go wide and explore the range of issues members think are important, as well as yielding insights into potential adaptations to funder practices that could contribute to a stronger advice sector. The success of year two may now be determined by each task and finish group's ability to focus broad discussions

towards a 'common cause' and move beyond funder practices. Not determining a focus for change may run the risk of turning what are hopeful spaces into *'talking shops.'*

The findings of the report have been fed back to the steering group, who will consider what tweaks need to be made to the collaboration as it moves into year two. IVAR will be conducting a similar review from June to September next year to support on-going reflection and improvement of the ADWP.

Appendix One: Advice Workforce Development Fund structures

Through IVAR's conversations with members, they shared their articulation of what each group was seeking to do. We have included these below as a potential resource to help inform conversations about the purpose and focus of these groups going forwards.

Steering group

For the first year the ambition was to:
- Understand the underlying assumptions that different funders have regarding workforce development.
- Ensure initiatives that have begun are sustainable in the longer term.
  The work has to identify some workforce issues in the advice sector.

  Listen to the evidence and identify what can be taken forward in a way that is sustainable.

For one funder it was helping them make the internal case of why advice should continue to be a priority area for funding.

Pay and conditions task and finish group

Problem: Sector is not able to recruit and retain a workforce
Solution: Fix the issue of pay and conditions
Approach: (1) research that will inform (2) actions/strategy.

Impact to date:
- Better tender for research. Research been commissioned that has supported the development of pay scales.
- Have managed to unpack the issues facing the sector and address the gaps in research.
- Ensured work is embedded in sector experience.

Next step: Develop a set of pay and conditions for the advice sector in London – produce models and ideas of where salaries should be benchmarked & understand what conditions are likely to attract people into the sector.

Audience to influence:
- Influence people already in the sector to improve the conditions of staff, especially those in senior management positions.
- Influence the way the advice sector is funded and improve the knowledge that funders have on what a healthy, sustainable and good quality advice sector

needs. *'By demonstrating the cost of a quality advice service and what is needed to keep staff, we hope to improve the funding and the way people fund.'*

- Longer term: Influence the national advice sector.

Strategy task and finish group

Problem: Disjointed advice sector

Solution: Co-produced pan-London strategy (funders and sector) and pan-London advice partnership that can withstand some of the peaks and troughs of funding and build some resilience in the London network; provide practical steps to improve the sector and building *'models that can better align with current social needs.'*

Approach: *'Following on from previous reports and research to develop a much more cohesive and coherent vision and framework for how advice services work, develop and interact, and how they're resourced, to better meet the needs of Londoners and to ensure the skills and capacity are there to help meet those needs.'*

Impact to date:

- Too early for impact yet. *'It is still in its formation in terms of its focus and purpose'* but has made people think about advice and the necessity of advice services.

- Funders realising the true nature of what advice services need to function and how current models create or reinforce gaps in the system. *'It is making Local Authorities and the VCS think about how to address gaps in advice provision and how to resource advice services.'*

- *'Helped advice sectors realise they can be resourced by health partners, like ICBs.'*

- *'For second tier advice organisations, it is becoming a period of renewing their understanding of the sector they are supposed to be representing after a period of change because of pandemic, cost of living, lack of resources, etc.'*

Audience: Similar organisations, funders and key players in the sector.

Organisational capacity task and finish group

Problem: Inadequate resourcing and capacity makes it more of a challenge to work in advice, whether as a frontline adviser or a supervisor/manager.

Solution: Sustainable advice sector which includes supporting people with lived experience expertise to deliver this work and building the capacity or organisations, in particular of smaller organisations, including those for whom advice work is not their core activity.

Approach: To be determined.

Impact to date: Have narrowed down to five possible areas of focus with the intention to focus on a single issue that is common ground among large and small stakeholders.

Audience: To be determined.