

## **Supporting the Implementation of NOS in the Legal Advice Sector and associated Toolkit**

### **Report and Case Studies**

#### **1. Introduction**

The objective of this project was to provide information, support and guidance to Legal Advice agencies to enable them to implement the new National Occupational Standards (NOS) for Legal Advice across a range of HR processes, and to make to best use of the new Legal Advice Services (LAS) National Occupational Standards (NOS) Toolkit publication.

The scope of this work covered a wide range of agencies and companies that provide legal advice to the public, including solicitors, not for profit organisations and specialist agencies advising people of immigration or benefits/welfare issues and local authority staff.

The National Occupational Standards (NOS) for Legal Advice were developed by practitioners from a wide range of advice provision that reflects the diversity of the Legal Advice sector, and were involved at each stage of the development. A steering group of the key legal advice agencies and networks initiated and led the standards development process. The NOS were formally submitted to the UK Coordinating Group for approval by Skills for Justice, the Standards Setting Body for the Justice sector.

The NOS were developed as part of a programme of work to create a more coherent career development pathway for advisors and to improve the quality and consistency of legal advice to the general public. There was also a need to raise the profile of Legal Advice generally and encourage new entrants into the sector.

These standards were developed following a three-year process of consultation with all key stakeholders in the field of independent legal advice, including Citizens Advice, the Law Society, and a range of advice agencies and practitioners. The NOS for legal advice cover England and Wales, and deal with both advice delivery itself and associated managerial and support functions.

The NOS are composed of generic standards describing elements that cut across all fields of advice delivery, such as diagnostic and interview skills, and knowledge units specifying the knowledge needed to provide advice either in particular subject areas, e.g. debt, or to particular client groups, such as students.

To support organisations looking to make use of the National Occupational Standards, Skills for Justice developed a “Legal Advice NOS Toolkit”. The Toolkit was designed to offer practical guidance on the uses of National Occupational Standards and to provide potential solutions to workforce development and HR issues at managerial, organisational and individual level.

The Toolkit was used by the Skills for Justice Team delivering this project in order to support the activity that took place within the agencies.

## **2. Methodology**

As the Legal Advice sector is not yet part of the Skills for Justice footprint the project team assigned to carry out this work, were given a one day briefing session by representatives of the project team that led the development of the NOS. The briefing outlined the background to the project to develop NOS, the structure of the advice sector, the type and range of work delivered by the legal advice sector and the employment and operating environment.

Legal advice services were approached to take part in this pilot and were selected to reflect the diverse nature of this sector in order to trial the use of standards in different environments. Ten agencies were selected including Citizens Advice Bureaux, Community Law Centre, DIAL, SHARE, Project 2041 Navigator, Money Advice Trust, a city council, Somali and Community Centre, and Advice UK.

Each of the 10 agencies were consulted on the workforce development and HR issues they were experiencing to identify the most appropriate use of NOS and to select and agree what support they might need.

Once this was clear the pilot sites were contacted by the Skills for Justice Workforce Development Advisors (WDA) in order to further scope the requirements and explore the outcomes required from the sites. Each site was allocated between 1-4 days consultancy dependant on size and need to advise and guide the agency on the most appropriate way to use the NOS to achieve desired outcomes. The Workforce Development Advisors (WDA) who are experts in this area offered a combination of solutions and were flexible in their approach. In some cases agencies were looking for guidance on how to navigate through the Toolkit, focusing in on priority areas for clarity and discussion on how to implement effectively. Others were keen to be shown the practicalities of starting from the beginning in terms of creating new job descriptions using NOS and revising their appraisal systems. In the agencies that provide training the main priority was to see how NOS mapped to their programmes and what gaps were highlighted in order to build additional sections of the course based on the NOS. These are just a few examples of the activity that took place; each case study in this report refers to this in more detail.

Following on from the site visits the WDAs were tasked to work with the agencies involved to produce case studies to further develop the Toolkit in order to offer other agencies wishing to use the Toolkit real life experience of using the NOS and practical examples.

Twenty two days were spent directly working with the legal advice agencies with two days allocated to writing this final report and the attached case studies.

## **3. Pilot Sites**

### 3.1.CAB Morecambe and Heysham

The brief:

Reception and admin staff are the first point of call for many clients and they need to know how to make decisions on level of support needed and referral. A new intake of admin volunteer workers have recently been recruited, and although there is a clear development route for advice volunteers this is not the case for admin volunteers. This agency is keen to use NOS to underpin the job descriptions of reception and admin staff in order for them to be clear about the expectation and performance required for the job role and to identify potential learning outcomes for the development of training.

Days spent working with agency – 2.5

<b>Skills for Justice Workforce Development Advisor</b>	Helen Brinton
<b>Subject area</b>	Mapping of job descriptions for reception and admin staff (volunteers) to NOS. Identify potential learning outcomes for development routes and/or development of training.
<b>Case study contact details</b>	
Name	Neil Parkin
Job title	Admin Supervisor
Organisation	Morecambe and Heysham CAB
Email address	post@morecambecab.cabnet.org.uk
Telephone number	01524 400404
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	Morecambe and Heysham CAB offer all kinds of advice to the local community, for example debt, housing, and benefits. The town has one of the highest percentages of households with limiting long-term illness and unemployment rates in Lancashire. The main employers are retail, services and low paid temporary work. There is a scarcity of affordable privately rented property and also a shortage of Local Authority properties in the local area. Only 31% of clients own their own home, the remaining 69% rent of otherwise live in accommodation with low security of tenure. The bureau is in one of the most deprived wards of the district. The largest ethnic minority groups in the area are Asian or Asian British Indian, Black or Black British African and Chinese. 2% of the population are from black and ethnic minority groups but there is an increasing local population for whom English is a second language.

<p><b>Overview</b></p>	<p>Reception staff and admin staff are the first point of call for many clients and they need to know how to make decisions on the level of support needed, referral etc. Morecambe CAB has recently recruited quite a few reception/admin volunteers. Advice volunteers have a clear development route, whereas reception / admin volunteers' development is more ad hoc in terms of their interaction with clients and the types of roles they undertake. There is no structured training programme in place at the moment.</p> <p>A mapping exercise has been carried out with the job descriptions and admin trainee programme to relevant NOS, some from LAS NOS and others from IAG, Customer Service and Business Administration. Learning outcomes based on the relevant NOS were identified and incorporated into a training programme. The NOS mapped to the job description were mapped onto a matrix to produce a development plan which will form the basis of work place assessment for new volunteers.</p>
<p><b>Background</b></p>	<p>Morecambe CAB was invited by Citizen's Advice nationally to take part in this pilot. This invitation came at the right time and provided an ideal opportunity to develop a structured training and development plan for Admin volunteers, as currently their training and development is very ad hoc.</p>
<p><b>Outcome</b></p>	<p>Neil Parkin now has some excellent ideas for training and development for administration staff. He is planning to re-write some of the training modules that admin volunteers currently undertake, using the matrix that SfJ helped him develop. He will also be developing a competency based assessment process for administration staff and volunteers. This will be used to identify any gaps for development and provide relevant training. A reception training module is also under development using standards from relevant NOS in legal advice, business administration, IT and customer service that will form the framework for the on the job training.</p> <p>In hindsight, if Neil had a clearer understanding of NOS and what they could be used for prior to the first Skills for Justice visit to the Bureau he could have made better use of the time allocated to him.</p>
<p><b>Next Steps</b></p>	<p>Neil has a number of new admin volunteers starting at the Bureau soon and he intends to apply the outcomes of this project to the induction, assessment and training and development of these new volunteers. The training programme will then be developed further following feedback of their experiences.</p>

	It is expected that the assessment and development plans will be a key part of helping volunteers recognise their achievements and also provide a structured basis for moving into paid employment for those looking for work. A clear development route will also be used to increase the range of tasks and responsibilities undertaken by volunteers and paid staff, leading to more rewarding job roles.
--	--

### 3.2.CAB Bedworth & District

The brief:

This agency is keen to role profile existing and new staff and has recently recruited a number of new volunteers who will need developing and training. They would also like to explore how NOS can be used to improve the existing appraisal system.

Days spent working with the agency - 2

<b>Skills for Justice Workforce Development Advisor</b>	Marc Hannis
<b>Subject area</b>	The Legal Advice pilot – delivering the Toolkit and mapping role profiles and performance management systems to NOS
<b>Case study contact details</b>	
Name	Denise Wilson
Job title	Deputy Manager
Organisation	Bedworth and Nuneaton CAB
Email address	denise.wilson@nabcab.org.uk]
Telephone number	02476643206
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>Citizens Advice Bureau Service in Nuneaton &amp; Bedworth is the largest provider of quality assured advice and information in the Borough and delivers an essential community service.</p> <p>Established in 1939 they have helped many thousands of people to resolve their problems. The Bureau's generalist advice service is funded by Nuneaton &amp; Bedworth Borough Council and Warwickshire County Council. The bureau's casework services are funded by the Legal Services Commission.</p>

<p><b>Overview</b></p>	<p>The objectives of this project were to demonstrate the practical uses of NOS by mapping the Legal Advice NOS to role profiles and the performance management processes for Generalist Advisors at the CAB.</p> <p>Denise Wilson, Bureau Manager, wanted to gain a thorough understanding of these processes so that she could then go away and replicate these tasks for other roles within the organisation.</p> <p>Skills for Justice did as described by taking an existing role profile for the Generalist Adviser role, and mapping into it relevant National Occupational Standards. During this process it became clear that in using the Standards as the basis for the role profile, the role profile was much more clearly defined and enabled staff to be very clear on what was expected of them to perform competently at their role.</p>
<p><b>Background</b></p>	<p>Denise had some experience of working with National Occupational Standards from previous roles and was keen to explore how she might be able to build upon the good work already in place in terms of staff development and performance management at Bedworth and Nuneaton CAB by incorporating the Standards into daily work practices, if appropriate. By doing this, Denise was sure that Advisers would be more confident in their roles, as a result perform better and ultimately provide a better service to the clients.</p>
<p><b>Outcome</b></p>	<p>The project has helped the CAB focus more on the role of the Generalist Advisers, acknowledging the extent of the work they actually do. Previously, role profiles were not specific enough and did not capture some of tasks and duties they should have done. Denise has also been able to re-design, with the help of Skills for Justice, the annual appraisal process for Generalist Advisers. This now incorporates the Legal Advice NOS and is a much more comprehensive mechanism for managing performance than had been in existence previously.</p> <p>Denise was very happy with the outcomes of the sessions with Skills for Justice and felt that there was a real advantage to getting involved in the pilot and embracing National Occupational Standards.</p>
<p><b>Next Steps</b></p>	<p>Denise is now looking to apply the principles she has learnt from the sessions that concentrated on the Generalist Advisers to other areas within the organisation.</p>

### 3.3. Greenwich Community Law Centre

The brief:

To map the roles of existing staff against NOS and identify learning and development needs. There are some lawyers and non legally qualified staff/volunteers employed at the centre.

Days spent working with the agency - 2

<b>Skills for Justice Workforce Development Advisor</b>	David Cadogan
<b>Subject area</b>	NOS for Legal Advisers
<b>Case study contact details</b>	
Name	Sabelo Siwela
Job title	Director
Organisation	Greenwich Community Law Centre (GCLC)
Email address	sabelo@gclc.co.uk
Telephone number	020 8858 7397
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>Providing free legal advice and representation both to individuals and to community organisations, Greenwich Law Centre plays an important role in developing the rights of communities and effecting changes in policy and legislation. Housing, employment immigration and nationality, discrimination, welfare rights, education and community care are some of the areas of law that Greenwich Law Centre and other Law Centres have been at the forefront of developing.</p> <p>Employing qualified and experienced staff, including solicitors and others, they are able to take action in the pursuit of legal remedies at every level.</p>

<p><b>Overview</b> A short summary of the case study,</p>	<p>In initial scoping discussions with the GCLC, Skills for Justice was requested to provide a briefing to staff based on the LAS Toolkit.</p> <p>The toolkit was introduced to the GCLC staff at a presentation in January 2007, focusing on practical uses of National Occupational Standards, and the specific issues of:</p> <ul style="list-style-type: none"> <li>• Managing change</li> <li>• Managing people</li> <li>• Promoting human rights</li> <li>• Working in partnership</li> <li>• Delivering performance and quality</li> <li>• Developing professionalism</li> <li>• Building public confidence</li> </ul> <p>Additionally, a 1:1 meeting was held with the Director to discuss ways forward for the use of NOS within the GCLC, and it was suggested that a starting point would be to develop NOS-based role profiles to replace job descriptions acknowledged as being out-dated. Skills for Justice offered to assist GCLC with this process however the Director wished to discuss this with his Governing Board before committing to the work.</p>
<p><b>Background</b></p>	<p>The key drivers for GCLC's involvement in the project to develop NOS for legal advice are a number of general incentives across the sectors concerned. These include:</p> <ul style="list-style-type: none"> <li>• A commitment to ensure that people receive an effective service that helps to reduce distress and pre-empt future problems</li> <li>• An interest, shared by all sectors, in developing a framework that will provide reassurance to consumers seeking help that they will receive high-quality advice that will meet their needs</li> <li>• For NfP agencies, a requirement to demonstrate to funders (commercial, statutory or charitable) that grants and contract payments are supporting well-run services whose quality of advice is subject to appropriate levels of scrutiny</li> <li>• A desire by the GCLC to support the development of recognised skills and/or qualifications for the non-practitioner staff members in particular.</li> </ul>
<p><b>Outcome</b></p>	<p>Individuals within the organisation benefited by receiving</p>

	<p>an increased knowledge of NOS and how they might be applied. As an organisation, GCLC has as yet been unable to create NOS based job descriptions until the matter has been negotiated with staff and presented to the Governing Board by the Director. Skills for Justice offered to present to the Board.</p> <p>Other reported outcomes from the work done by Skills for Justice include:</p> <ul style="list-style-type: none"> <li>• NOS are increasingly brought into discussions in respect to work by staff, and</li> <li>• There is a tangible change in atmosphere towards self-development by staff, with more staff looking to spend time on their personal development.</li> </ul>
<p><b>Next Steps</b></p>	<p>The development of the Greenwich Community Law Centre as a NOS-based organisation is dependant upon a number of things, including the role of the Director. In turn, the Director's ability to drive this forward is shaped by the relationship and support provided by his Governing Board and the staff.</p> <p>Skills for Justice await further contact from the Director in respect to how discussions with the staff representatives and the Board have gone.</p> <p>It might assist the process if the Legal Advice sector collaborates to develop a set of core role profiles. This may help Law Centres identify and implement role profiles which are fit for purpose.</p> <p>As training programmes become more explicitly linked to specific NOS in the future, the need for staff role profiles to be mapped to Standards will be increasingly apparent. Organisations will be clearer on the need to identify NOS relevant to staff role and organisation functions.</p> <p>Having had this introduction there is a determination that the organisation will continue with this work into the future. There is also a realistic acknowledgement that this will all take time.</p>

### 3.4. DIAL Chester

The brief:

To map existing staff and volunteer roles to NOS. To benchmark individuals skills, knowledge and understating against the NOS and to improve the quality of the advice service that is offered. In addition to identify ways that the organisation can evaluate the impact of NOS in the longer term.

Days spent with the agency - 3

<b>Skills for Justice Workforce Development Advisor</b>	Helen Brinton
<b>Subject area</b>	Mapping of job descriptions for volunteer reception staff and both volunteer and paid advisers to NOS, in conjunction with the LAS toolkit. Identify ways that DIAL can evaluate the impact of NOS in the longer term.
<b>Case study contact details</b>	
Name	Keith Roper
Job title	General Manager
Organisation	DIAL House, Chester
Email address	kroper@dialhousechester.org.uk
Telephone number	01244 345655
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>DIAL House provides a free, confidential and independent advice and information service. An integrated approach is taken to provide specialist advice work covering disability rights and welfare benefits. We provide help to individuals with disabilities to seek their rights under the Disability Discrimination Act. Equally important is the provision of information and advice to employers and the wider community about rights and responsibilities. Casework is undertaken on disability rights and welfare benefits from claims, through to advocacy at tribunals and making representations to Commissioners. DIAL also provides an extensive generalist information service answering enquires relating to equipment, access, transport, employment, education, sports and leisure and health. DIAL operate an appointment service for detailed enquiries and completion of welfare benefit claim forms as well as a Duty Adviser (on a drop in basis).</p> <p>The DIAL House Community Café plays an important part in providing a social environment for the local community, and in making clients feel welcome at the centre whilst waiting to see an adviser.</p>

<b>Overview</b>	<p>DIAL House wanted to map existing paid and volunteer roles to NOS and benchmark individuals' skills, knowledge and understanding against the NOS. They would like to improve the quality of the advice service that they offer by assessing and developing the competence of the staff which will lead to improved quality of service.</p> <p>Skills for Justice (SfJ) with the agency mapped job descriptions to NOS for volunteer reception staff, volunteer advisers and paid advisers using the most appropriate NOS. SfJ then produced role profiles for each role. Staff development packs were produced for the 3 roles which included copies of all of the NOS identified in the role profile. Development and progression areas were identified for volunteer advisers based on the Legal Advice NOS.</p>
<b>Background</b>	<p>DIAL House got involved in this project to strengthen their staff development procedures and in recognition that development and training can underpin quality of service. They wanted to improve staff development partly to improve the quality of service and partly due to demand from volunteers who wanted to see more structured staff development and training.</p>
<b>Outcome</b>	<p>The agency now has a greater understanding of NOS and their uses, and how they can be applied to all roles. The General Manager said 'I would not have been able to put the staff development packs together without assistance of SfJ. I am pleased that a tangible tool has been developed during this process that I can now implement for all staff. I now know where to find other standards when I need them. I am delighted that this project has given DIAL House such a wonderful opportunity to develop the competence of staff and, in turn, improve the quality of our services'.</p> <p>Given more time it would have been beneficial to have covered more staff roles, and raise awareness among staff of the benefits and uses of NOS at an earlier stage.</p>
<b>Next Steps</b>	<p>Existing volunteers (receptionists and advisers) will be introduced, and asked to sign up, to the new staff development packs. New volunteers will be given a pack as part of their induction and it will form part of their personal development programme.</p>

### 3.5. SHARE, Cornwall Youth Services.

The brief:

The agency would like to review job descriptions and create roles profiles. SHARE currently operate and assess the NVQ in Advice and Guidance and run a training course in support of the qualification. Interested in developing the course in line with the new NOS.

Days spent with agency – 1

<b>Skills for Justice Workforce Development Advisor</b>	Tina Parker
<b>Subject area</b>	-The general application of NOS and the LAS toolkit -Specific utilisation of NOS within learning programmes delivered by SHARE
<b>Case study contact details</b>	
Name	Mel Carne
Job title	Youth Work coordinator
Organisation	Camborne SHARE
Email address	mcarne@cornwall.gov.uk
Telephone number	01872 260411
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	SHARE offer information, advice and support to young people aged 13 -25 on a range of issues, including housing law and advice, benefits law and advice, sexual health (use of Gillick competencies, employment rights. With offices in Camborne, Penzance, St Austell and Bodmin and outreach in Liskeard and Newquay. The nature of work involves providing a high level of advice on housing and benefits legislation.

<b>Overview</b>	<p>SHARE wanted to look at how the occupational standards could be linked to current training and how the agency could start to become familiar with the NOS. SHARE also was keen to have some ideas of how NOS could be used throughout other parts of the organisation.</p> <p>SHARE felt that Skills for Justice gave a comprehensive overview of the occupational standards and developed their familiarity with them. Mel Carne said 'the facilitator was extremely flexible to the needs of the group, linked the NOS to our training and also looked at other ways we could usefully use the standards'.</p>
<b>Background</b>	<p>SHARE were involved in the development of the occupational standards in terms of welfare rights for young people and were interested in the project in order to find a way to measure the content of advice given by workers to young people, rather than just the process. All their volunteers work towards a Level 3 NVQ in Advice and Guidance.</p>
<b>Outcome</b>	<p>The visit has given the agency an idea of different standards that can be used to measure competency and minimum standards.</p>
<b>Next Steps</b>	<p>SHARE will start to look at using NOS as part of the recruitment process, JD's, training and other QA tools.</p>

### 3.6. Project 2041, Navigator

The brief:

This agency is in the process of merging with a larger Midlands-based charity and would like support around expanding services and partnership working. They wish to use NOS to benchmark practice between staff from two organisations, to map current staff job descriptions and any new job descriptions to NOS and identify skills gaps.

Days spent with agency – 3

<b>Skills for Justice Workforce Development Advisor</b>	Pamela Padden
<b>Subject area</b>	Legal Advice NOS Pilot – uses of NOS on benchmarking skills and mapping and creating new job descriptions
<b>Case study contact details</b>	
Name	Alison Beasley

Job title	Advice Services Co-ordinator
Organisation	Project 2041 Navigator
Email address	<a href="mailto:AlisonBeasley@project2041.org.uk">AlisonBeasley@project2041.org.uk</a>
Telephone number	0208 581 1055
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>Project 2041 Navigator is a National award winning charity based in Hillingdon, west London, Their work is best defined by their mission statement;  “Changing lives, by empowering young people at risk of homelessness, with the support and opportunities necessary to enable them to lead independent and self-sufficient lifestyles.”</p> <p>The project has been operating since 1984 and has expanded beyond managing supported housing schemes to include advice centres, training units and support services for young people between the ages of 16 and 25.</p> <p>At the end of 2006 Project 2041 Navigator merged with P3. P3 are a Midlands-based charity whose client group include young people with mental health problems. They offer supported housing, mental health services, link worker schemes, outreach and prison in-reach and have been in existence for 30 years. The merged organisations seek to offer “one of the most effective organisations in the UK tackling social exclusion.”</p>

<b>Overview</b>	An initial meeting with Alison Beasley, Advice Services Co-ordinator was set up to look at using the Toolkit. We discussed the process of mapping the units within the new Legal Advice National Occupational Standards (NOS) to existing job descriptions (JDs) to align similar roles and responsibilities, using the common language of the standards. Some of the sample JDs in the toolkit fitted closely with those in the organisation, others were a mix of several. It was agreed that Skills for Justice would map a selection of JDs to the standards to illustrate how they might look.
<b>Background</b>	Project 2041 Navigator became involved with the Legal Advice pilot project because they wanted to look at how the new National Occupational Standards might assist the process of merging 2 different organisational cultures and backgrounds to form one organisation with a shared identity and vision.
<b>Outcome</b>	Following the meeting and upon receipt of the mapped JDs, Alison said she felt she had a good enough grasp of NOS and how to use the toolkit to enable her to take this work forward. Alison says the project provided them with a baseline to start to work with NOS.
<b>Next Steps</b>	The guidance has helped them to get started with looking at how their roles fit into the standards the process of ensuring that all new JDs are based on the new NOS.

### 3.7. Advice UK

The brief:

Advice UK provide training to members and other advice agencies, they are an NVQ centre for Advice and Guidance, Learning and Development, A1, V1 and Management awards. They aim to map the new NOS to the 'Learn to Advise' programme, introduce NOS to their trainers and subject experts in order for them to understand how to use them effectively when developing and revising training programmes.

Days spent with agency – 4

<b>Skills for Justice Workforce Development Advisor</b>	Pamela Padden
<b>Subject area</b>	Legal Advice pilot – to map NOS to current training programme and coach staff within the agency on uses of NOS

<b>Case study contact details</b>	
Name	Liz Carboni
Job title	Training & Assessment Manager & Co-director
Organisation	AdviceUK
Email address	Liz.Carboni@adviceuk.org.uk
Telephone number	0207 407 6611
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>AdviceUK was formed in 1979 as the Federation of Independent Advice Centres (FIAC) and is the UK's largest support network for free, independent advice centres. AdviceUK has a regional structure which mirrors the Government Office regions of the UK. AdviceUK London is the most developed region, with teams of development and training staff. 1/3 of the membership is located in Greater London.</p> <p>In addition to delivering Learning and Development and Advice Management training, the London office operates as an NVQ assessment centre for Advice and Guidance and registers approximately 400 candidates per year.</p> <p>AdviceUK deliver the 'Learning to Advise' course to candidates who either work or volunteer as Advisors. Learning to Advise is a 7 module, 13-day advice work training modular programme, designed to meet the needs of new advice workers and those who undertake advice work alongside other roles. It provides both the essential skills and knowledge framework that an advice worker will need to perform effectively in their job.</p>

<b>Overview</b>	<p>Following an introductory meeting with Liz Carboni, it was agreed that Skills for Justice could assist by looking at the existing Advice and Guidance NVQ and help with map it to the new Legal Advice units. The Learning to Advise programme aims to provide the underpinning knowledge for the Advice and Guidance NVQ. The mapping process was undertaken in order to ensure that the Legal Advice NOS were represented fully in the training programme and to identify any gaps in the program resulting from the changes in the units. The content and learning outcomes of the Learning to Advise course were examined and advice given on where the content may need to be adapted or extended to ensure that all Underpinning Knowledge for the new units, was covered. A meeting was subsequently held in London with those involved in delivering the programme and assessing the NVQ to address any queries arising from this exercise. The meeting was well attended and received positive comments.</p>
<b>Background</b>	<p>AdviceUK has been involved with the development of the NOS for Advice from the beginning. The training teams have wanted to offer something related specifically to NOS for advice rather than Advice and Guidance which is not always the best fit for their members. They are keen to be involved in new initiatives &amp; welcome anything that will impact on their members &amp; the wider not-for-profit advice sector</p>
<b>Outcome</b>	<p>AdviceUK say the project has helped them use the new NOS to show that they offer training for advisers which is clearly mapped. It will help raise their profile and add value as trainees will receive training that is aligned with the standards. Liz Carboni said "Working with SfJ has been a good and positive experience. Staff are also more aware of the value of NOS. Mapping the NOS against the existing NVQ in A &amp; G has also been extremely useful".</p>
<b>Next Steps</b>	<p>Having had their main training programme, Learning to Advise, mapped against the new Legal Advice NOS, they will be mapping other related training against these (and other NOS where relevant) They aim to keep "in the loop" with Skills for Justice and the employers group so influence any potential qualification development for the benefit of their members &amp; the wider Not-for-Profit advice sector in the future.</p>

### 3.8. Money Advice Trust

The brief:

This agency is keen to explore how they can revise their current training programme to bring in line with NOS. Would like to map the training programme to the new standards in order to identify any gaps in current provision against the agreed learning outcomes in the NOS. Provide initial support to help trainers to review and revise learning and development programmes in line with NOS.

Days spent with agency – 3

<b>Skills for Justice Workforce Development Advisor</b>	<b>David Cadogan</b>
<b>Subject area</b>	Legal Advice Pilot – review training programmes against NOS and coach staff to use effectively.
<b>Case study contact details</b>	
Name	Nick Garrod
Job title	Head of Training
Organisation	Money Advice Trust
Email address	nick@moneyadvicetrust.org
Telephone number	020 7653 9731

<b><u>Brief biography of case study agency and / or person</u></b>	<p>The Money Advice Trust (MAT) is a charity formed in 1991 to increase the quality and availability of free, independent money advice in the UK.</p> <p>MAT works with government, the private sector and the UK's leading money advice agencies to:</p> <ul style="list-style-type: none"> <li>• increase the availability of money advice</li> <li>• improve its quality; and</li> <li>• improve the efficiency and effectiveness of its delivery.</li> </ul> <p>As well as planning a national strategy for money advice services, the Money Advice Trust offers debt advice to the public and provides high-quality training for money advisers.</p> <p>MAT also raises money from funders to provide secure, long term funding for quality money advice services.</p> <p>MAT's key activities are:</p> <p>Support to the debt advice sector through:</p> <ul style="list-style-type: none"> <li>• Training</li> </ul>
--	---

	<ul style="list-style-type: none"> <li>• Second tier support</li> <li>• Quality assurance developments, e.g. accreditation</li> <li>• Policy, research and evaluation</li> <li>• Fundraising, facilitation and strategy development</li> </ul> <p>Direct service provision (National Debtline and Business Debtline) (Source: MAT website, 2007)</p>
<p><b><u>Overview</u></b></p>	<p>The toolkit was introduced to the Money Advice Trust and representatives of a number of partner organisations, such as the Institute of Money Advisers and Citizens Advice, and other individuals such as wiser adviser trainers, at a presentation in January 2007 focusing on practical uses of National Occupational Standards, and the specific issues of:</p> <ul style="list-style-type: none"> <li>• Managing change</li> <li>• Managing people</li> <li>• Promoting human rights</li> <li>• Working in partnership</li> <li>• Delivering performance and quality</li> <li>• Developing professionalism</li> <li>• Building public confidence</li> </ul> <p>Further meetings were held (a) with the Head of Training to map of the MAT training programmes to the National Occupational Standards. It became clear that this process required the input of programme specialists having knowledge of programme content beyond that of the Head of Training, (a) to be able to link programme outcomes and underpinning knowledge to elements within the relevant NOS, and (b) with the Head of Research and Policy to consider the issue of how NOS-mapped to ‘wiser adviser’ training courses would fit with the MAT-facilitated Money Advice Quality Model (MAQM). This course aims to explore both the introduction/passporting to relevant organisational standards and individual training, assessment and qualification routes to strengthen the quality of money advice provided by the sector.</p>
<p><b><u>Background</u></b></p>	<p>The momentum for becoming involved in the development of National Occupational Standards for money advice has been driven by a number of general incentives across the sectors concerned. These include:</p> <ul style="list-style-type: none"> <li>• A commitment to ensure that people in debt receive an effective service that helps to reduce distress and</li> </ul>

	<p>pre-empt future problems</p> <ul style="list-style-type: none"> <li>• A desire to reduce levels of unpaid debt and thereby increase profits to creditors via the provision of accurate and appropriate advice</li> <li>• An interest, shared by all sectors, in developing a framework that will provide reassurance to consumers seeking help that they will receive high-quality advice that will meet their needs</li> <li>• For NfP agencies, a requirement to demonstrate to funders (commercial, statutory or charitable) that grants and contract payments are supporting well-run services whose quality of advice is subject to appropriate levels of scrutiny</li> <li>• For commercial organisations, a parallel need to demonstrate quality of advice and reliability of service to shareholders and product regulators, and a realisation of the possible competitive and promotional edge that accredited companies might have over non-accredited ones</li> </ul> <p>Specific developments in the debt solution products field include:</p> <ul style="list-style-type: none"> <li>• The increase in the number of people entering into individual voluntary arrangements (IVAs) or filing for bankruptcy, which has acted as an incentive for insolvency practitioners to evidence the quality of their work</li> <li>• The proposed introduction of Simple Individual Voluntary Arrangements (SIVAs)</li> <li>• Discussions about the development of Debt Relief Orders (DROs) and the appropriateness of authorising intermediaries to administer them via an accreditation scheme</li> <li>• The likely introduction of regulated Debt Management Schemes and Debt Repayment Plans</li> </ul> <p>(Source: MAT discussion paper (2006) "Accreditation for Money Advice" 2006)</p>
<p><b><u>Outcome</u></b></p>	<p>The project has helped Money Advice Trust and its partners in three ways:</p> <p>1. Money Advice Quality Model The Money Advice Trust (MAT) is involved in the Money Advice Quality Model (MAQM) development project, which aims to develop a quality assurance scheme for money advice providers.</p> <p>MAT has been working on this initiative with a number of</p>

	<p>organisations representing the three sub-sectors (Not-for-Profit, public and commercial sectors). for several months. Having consulted with a wide range of agencies across the money advice sector on a draft quality model, which has been drawn up with the support of ADP Consultancy, the work Skills for Justice has done with MAT and with ADP will contribute to the outcome of this initiative in terms of matching training/NOS mapping outputs with workplace/NOS mapping outputs.</p> <p><b>2. Mapping training to NOS</b>  The Money Advice Trust provide training programmes for money advisers at Generalist, Case worker and Specialist level – many in the form of e-learning through “wiseradviser” online. In order to inform staff whose job descriptions have been linked to NOS as to what training is key to their role, it is necessary to map the training programmes to NOS and for that the linked NOS to be stated within the programme guidance.</p> <p>In discussion with MAT, broad links were made between programmes and relevant NOS, however this work needs to be taken further.</p> <p><b>3. Mapping Role Profiles to NOS</b>  The initial Skills for Justice presentation was made to representatives of partner organisations, as detailed above. These organisations provide advice directly to clients. Staff providing advice and staff supporting the service need to have their roles mapped to NOS. This will ensure that they and their membership organisations are able more clearly to link their roles with training opportunities.</p>
<p><b><u>Next steps</u></b></p>	<p>Current and future MAT training programmes need to be mapped to NOS. Given the large numbers of programmes provided by MAT, this task will best be completed by programme specialists and coordinated by the MAT Head of Training.</p> <p>Further work will need to be taken forward by the Head of Research and Policy in collaboration with partner organisations to develop quality assurance and professional development systems appropriate to the sector. This will provide a mechanism for linking individual training, assessment and qualification routes to the NOS recognised and agreed by the sector.</p> <p>The MAT-facilitated MAQM project is intending to run a number of consultation events in the coming months, with the aim of enabling the money advice sector to agree a</p>

	core of NOS based role profiles. The scope of this work maybe extended beyond legal advice to embrace other NOS as appropriate – e.g. generic NOS such as the management of IT, and other technical suites such as the generic Financial Advice NOS. This will allow providers to target training appropriate to specific roles and for role holders and their line managers / employing organisations to identify appropriate training opportunities.
--	--

### 3.9. Bury City Council

The brief:

To work with a front line worker in order to scope out the possibility of mapping job description to NOS and to identify any learning and development needs from this process.

Tine spent with agency – 1 day

<b>Skills for Justice</b> Workforce Development Advisor	Marc Hannis
<b>Subject area</b>	The Legal Advice pilot – delivering the Toolkit and mapping role profiles and performance management systems to NOS
<b>Case study contact details</b>	
Name	Sholeh Dehghan
Job title	Asylum Seeker Link Worker
Organisation	Bury City Council
Email address	s.dehghan@bury.gov.uk
Telephone number	0161 253 6423
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>Working across the whole of Bury and funded by the local authority, Sholeh as an Asylum Seeker Link Worker is responsible for:</p> <ul style="list-style-type: none"> <li>• carrying out audit of family and child need</li> <li>• carrying out audit of school and community provision.</li> <li>• ensuring that provision responds positively and sensitively to asylum seeker families.</li> <li>• ensuring that service providers are able to communicate effectively with asylum seeker children and families.</li> <li>• visiting the homes of refugees and asylum seekers with an interpreter to collect information to inform pastoral</li> </ul>

<p><b>Overview</b></p>	<p>The objectives of this project were to demonstrate the practical uses of NOS by mapping the Legal Advice NOS to Sholeh's role as an Asylum Seeker Link Worker. This role is critical in connecting Asylum Seeking families with all the important services and benefits they are entitled to, including schooling and health provision. Sholeh was the only person in this role in the organisation which made this quite a unique pilot.</p> <p>She recognised that she could, with agreement from her line manager, begin to work with NOS through her role description and begin to adopt NOS principles into how she is appraised etc, but she would be the only one in the organisation working to these standards.</p> <p>Skills for Justice spent time mapping the NOS to Sholeh's role profile and explained in detail the principles behind this process. As we began to go through this process it became clear that in order to get the most out of using the NOS, Sholeh would have to adopt NOS into all of her work behaviors and activities. This was not something that had been fully anticipated and to this end, Sholeh expressed some doubts as to whether she would be able to do this.</p> <p>Sholeh understood the principles behind mapping NOS but was a little unsure as to how in practice she could be supported by her line manager/employers to work to and be appraised against these standards.</p>
<p><b>Background</b></p>	<p>Nominated by the NOS project Steering Group.</p>
<p><b>Outcome</b></p>	<p>It is difficult to say if the project has helped. Sholeh expressed some concern that despite receiving this learning it would be difficult to implement it as she was the only person in her organisation that these Standards really applied to. She insisted that her line manager was on board with this and in hindsight it may have been more beneficial if both Sholeh and her line manager had been involved in the presentation and mapping work that was delivered.</p>
<p><b>Next Steps</b></p>	<p>Sholeh is committed to adopting the Standards in her working practices, but in follow up to our meeting she expressed concern that pressures on her workload were making this somewhat difficult. As a result, she had not been able to map fully her role profile to the Standards. By using the standards, she had, however, been able to identify some training needs she had.</p>

### 3.10. Somali and Community Centre

The brief:

Interested in using NOS to develop role profiles and to explore the wider standards applications across HR processes in particular.

Days spent with agency - 1

<b>Skills for Justice Workforce Development Advisor</b>	Marc Hannis
<b>Subject area</b>	The Legal Advice pilot – delivering the Toolkit and mapping role profiles and performance management systems to NOS
<b>Case study contact details</b>	
Name	Rebecca Carter
Job title	Community Development Manager
Organisation	Somalil and Community Centre
Email address	somalilandcc@hotmail.co.uk
Telephone number	0161 636 7543
<b>Case study content details</b>	
<b>Brief biography of case study agency and or person</b>	<p>Based in the Moss side area of Manchester, the Somaliland Community Centre has been established to reach out to the local Somali population and provide advice services (how to access financial entitlements, registrations for doctors, schools etc) and support in relation to regeneration initiatives in the area as well as the running of the Community Centre</p> <p>Although official figures are much lower, it is estimated that there are about 10,000 Somalis in Manchester and as such, much work for the Centre to do.</p>

<p><b>Overview</b></p>	<p>The objectives of this project were to demonstrate the practical uses of NOS by mapping role profiles within the organisation to the example profile of Refugee Advice Support Worker's as found in the Legal Advice NOS Toolkit and begin to explore the wider application of NOS to other HR processes such as performance management.</p> <p>Rebecca Carter, Community Development Manager, wanted to gain a thorough understanding of how the NOS could be mapped to these role profiles, what that would do in terms of enhancing their role profile, the time and effort it takes to do this and some sense of the impact this might have on other roles within her organisation. Familiarity with the methodology behind this would mean that Rebecca could consider mapping NOS across other HR related functions.</p> <p>Skills for Justice spent time mapping the Refugee Advice Support Worker's role profile to Somali Refugee Centre's front line Refugee Advisers' profiles and explained in detail the principles behind this process. We also had a discussion about how applying the same principles to mapping standards to other role profiles and performance review documents could benefit the organisation by providing clarity on roles, improving performance and ultimately ensuring that clients enjoy a better service from the Centre.</p>
<p><b>Background</b></p>	<p>Nominated by the NOS project Steering Group.</p>
<p><b>Outcome</b> How has the project helped? How has the agency/person benefited? Could anything have worked or been done better?</p>	<p>The NOS role profiles have been used to rework staff job descriptions so that they meet the 'Refugee Advice Support Worker' profile. This has enabled them to work with each individual Support Worker to identify training and support needs, which has benefited the staff members and the clients in terms of ensuring that staff have the training and support to deliver the best service possible.</p>
<p><b>Next Steps</b> How will the agency/person take this learning forward?</p>	<p>The NOS standards will be used to inform future recruitment and selection processes and to act as a quality standard by which they will develop advice work.</p>

#### **4. Summary of main outcomes**

Within the participating agencies that deliver learning and development programmes to staff and volunteers there was a keenness to map the NOS to the offered provision. This was deemed a real positive as they were really able to see the added value this would give trainees and also a method of clarifying that the package was 'fit for purpose' for the sector. In one of the providers the briefing process was far more about exploring the options and then considering how planning and implementation would need to be managed and arranged on an organisational level.

In the other agencies it was deemed a priority to look at reception and admin staff to develop a competency based assessment process to identify gaps in development and provide relevant training using the standards. Using NOS they also developed role profiles that would ensure that staff had a clear, comprehensive understanding of their job role and function. The standards will also be used to develop an effective induction process for new paid staff and volunteers.

All of the agencies were interested in understanding how to either build job descriptions or review current job description to the standards. They all saw the benefits in starting this process at the beginning in order to assist with recruiting and training the right people with the right skills into posts and then using the NOS process from this to develop role profiles and use in the appraisal system. In one case it would have been interesting to see how the NOS could have been used to analyse and build on the skills of two merging organisations and although the agency involved was very keen to embrace the idea and worked really well with the WDA the pressures of the merger itself and the issues that were being experienced at the time may have clouded the potential benefits.

In the case of smaller agencies it was not always a easy to see the immediate advantages, however, all of the individuals involved were able to appreciate the benefits of mapping their job roles to NOS and identifying learning and development requirements that they could take forward to their line manager to improve practice or service.

The feedback from one or two sites from the lead person in the agencies stated that they felt that could have benefited from a briefing on NOS prior to the visits from the WDA in order to really maximise the consultancy time given.

#### **5. Next steps - planned uses of NOS in pilot agencies**

In one agency a Development Pack for all new and existing staff was to be introduced in order to create a culture of personal development and to form the basis of the induction process based on NOS. Another agency intends to run a number of consultation events in order to agree a core of NOS based role profiles and will also look to use other suites of standards to cater to other requirements such as IT, Financial Advice and other technical NOS. This will allow providers to target training appropriate to specific roles, and for role holders and their line managers to identify training opportunities.

At one site the NOS role profiles developed in partnership by the agency and the WDA will be used to rework staff job descriptions so that they meet the required 'Refugee Advice Support Workers' profile. This will enable each individual to identify training and

support needs to deliver the best service possible. The NOS will also be used to inform future recruitment and selection processes and form the basis of a quality standard in which to develop future advice work.

The standards will also be used to assist volunteers, recognise their achievements and provide a mechanism for moving into paid employment and will inform a development route that looks to increase the range of tasks undertaken in order to achieve enhanced job satisfaction.

Sally McManus  
March 07