

Transferable Skills

A competency framework for the Advice Skills Academy



European Union
European
Social Fund

Acknowledgements

This competence framework has been produced for use *within* the Advice Skills Academy and should not be shared or adapted for wider use.

The framework draws on the Skills for Business Employability Skills Toolkit, the Employability Skills Matrix for the Health Sector and the Get Digital basic digital skills framework.

Transferable Skills

Transferable skills are the crucial functional and employability skills that enable individuals and organisations to work, learn and develop together effectively.

They include the ability to:

- use information and communicate effectively
- problem-solve, work with others, self-manage and act responsibly

These are the skills that underpin both capability and confidence.

Individuals need these skills to find and keep employment and to progress in their career.

Organisations need these skills to function effectively.

Transferable skills are just that – they are generic skills that apply in, and can be transferred to, any job role and employment context.

Here are just a few examples of activities within a local Citizens Advice service that demand transferable skills:

- Communicating effectively with clients.
- Completing induction and the adviser learning programme.
- Time management.
- Understanding and following principles, policies and procedures.
- Keeping accurate case records.
- Monitoring organisational budgets.
- Going online to find information.

Transferable skills enable staff to:

- work safely and meet quality standards
- work flexibly and adapt to change
- communicate effectively with clients, colleagues and external organisation
- access and participate in learning and gain qualifications
- take on additional responsibilities and progress in their career

Transferable skills enable local Citizens Advice services to:

- deliver high-quality advice that is free, confidential, impartial and independent
- help people overcome their problems and act as a voice on the issues that affect them
- operate flexibly and efficiently
- develop their services
- adopt new technology and new working practices

The transferable skills that are typically expected of *all staff* working in local Citizens Advice services.

Summary of transferable skills required

- Communicate effectively with people in the workplace
- Respond constructively to queries and complaints, taking full part in formal and informal discussions, ensuring contributions meet the needs of the audience
- Analyse a range of texts, produce effective emails, write client case records, presenting information in a manner suitable for the audience
- Select and compare information from lists, tables, diagrams and charts and use appropriate mathematical methods to solve identified problems
- Use IT as directed, maintaining confidentiality
- Work with others towards achieving shared goals, learning from mistakes and being open to the opinions of others including clients and colleagues, receiving and giving constructive feedback
- Demonstrate honesty and integrity when dealing with others
- Deal with a range of problems and people with honesty and integrity, showing interest in your work and seeking and valuing the contributions of others
- Suggest alternative ways to get the job done without compromising the principles and policies of the service
- Pro-actively raise concerns about the provision of services to clients with supervisor and managers
- Understand your rights and responsibilities in the workplace including promoting equality of opportunity, valuing diversity, complying with health and safety and data protection policies and maintaining client confidentiality
- Make best use of resources including time, to achieve agreed goals for service delivery, taking responsibility for own actions and self-development
- Be open and respond constructively to change, coping with uncertainty and taking the lead in supporting others in the team as appropriate

Skills in communication, mathematics and use of information technology (IT)

Indicative qualifications for these skills are

- English & mathematics O-level, CSE grade 1, GCSE A*-C or 4-9, Functional Skills level 2
- digital skills level 2, IT end-user level 2 or Functional Skills ICT level 2

Communication and customer care

- Communicate effectively with others in a variety of work settings
- Listen to, understand and follow lengthy or multi-step instructions and narratives
- Consider a range of information and give a relevant, cogent response
- Respond constructively to queries and complaints
- Pro-actively raise concerns about the provision of services to clients with supervisor and managers
- Speak clearly and confidently in formal and informal discussions, adapting contributions to suit audience, purpose and situation
- Read and understand a range of texts
- Write effective emails, short reports and client case records

Mathematics

- Read and understand straightforward symbols, diagrams and charts in different contexts and for different purposes
- Extract, select and compare relevant information from lists, tables, diagrams and charts
- Identify the situation or problem and choose the appropriate mathematical method to solve them, including performing better-off calculations, simple audits or surveys and assisting with campaigns or research projects
- Observe and record discrete and continuous data using numerical, graphical and written formats appropriate to purpose, findings and audience
- Follow strict organisational guidelines in relation to financial responsibilities

Use of IT

- Select, interact with and use technology independently to meet given needs and trouble shoot straightforward problems
- Store information following agreed procedures for the safety and security of data

Teamwork: team working skills and attributes needed for the provision of high quality advice services

Working with others

- Work with others towards achieving shared goals
- Respect and be open to the thoughts, opinions and contributions of others, including colleagues and clients
- Recognise and respect people's diversity, individual differences and perspectives
- Learn from your mistakes and accept and give feedback in a constructive and considerate manner
- Contribute to the work of the team by sharing information and expertise

Solving problems

- Assess situations and identify potential problems
- Seek different points of view, including the views of clients, and evaluate them on the basis of facts
- Readily use theoretical and practical knowledge to think, gain and share information, solve problems and make decisions
- Implement solutions in ways that enhance the experience of clients, colleagues and others

Personal: personal skills, qualities, values and behaviours that contribute to the provision of high quality advice services

Demonstrate positive attitudes, values and behaviours

- Undertake work including problem solving with honesty and integrity
- Recognise, and reflect on your own good efforts and value the contributions of others
- Engage and show interest in your work, taking care of your personal health and wellbeing, including resilience, hygiene and appearance
- Identify and suggest alternative ways to get the job done whilst maintaining the principles and policies of the service

Be responsible

- Meet timekeeping and attendance requirements
- Adhere to health and safety practices and policies to promote wellbeing
- Understand your rights and responsibilities in the workplace including your responsibility to identify and raise any issues relating to service provision with more senior staff
- Adhere to best practice in terms of equality of opportunity and valuing diversity when working with colleagues, clients and others
- Understand and respect the principles and policies of the service including client confidentiality and data protection
- Manage the balance of your work and personal life
- Plan and manage time and resources to achieve goals, asking for help when needed
- Take responsibility and be accountable for your own actions including taking the lead in supporting others in the team when appropriate

Be adaptable

- Be open and respond constructively to change
- Cope with uncertainty seeking help when necessary

Learn continuously

- Take responsibility for your own learning and be willing to continuously learn and grow, setting your own learning goals
- Assess personal strengths and areas for development
- Access and make use of relevant learning resources and opportunities
- Plan for and work towards the achievement of your learning goals

Examples of the higher level transferable skills that *may* be required for more senior, specialist, management or leadership roles within local Citizens Advice services.

Summary of transferable skills required

- Listen to, understand and communicate complex information from a range of sources, adopting effective questioning techniques to elicit and appreciate a range of views
- Respond constructively and confidently to queries and complaints, negotiating with others in a way that suits the situation, demonstrating a high level of theoretical and practical knowledge
- Evaluate and interpret a range of texts and write effectively for a range of contexts and situations, maintaining honesty, integrity and transparency of information
- Select and compare and discuss mathematical information from a range of sources and use appropriate mathematical methods and tools to solve identified problems and assist with bids, audits, evaluations, campaigns or research projects as required
- Be responsible for the efficient and cost-effective management of a budget for one or more services
- Use IT to meet identified needs and plan and evaluate the work of the team effectively
- Work with others towards achieving shared goals, ensuring the team's goals are clear and achievable
- Learn from own mistakes, accepting and giving constructive feedback
- Demonstrate honesty, integrity and transparency when dealing with others, taking the lead on implementing principles, policies and procedures
- Assess the root cause of problems in complex and unpredictable environments
- Seek and evaluate different points of view and use theoretical and practical knowledge to inform solutions and make decisions
- Show interest in your work, developing, with the team, a clear purpose and work objectives
- Seek and value the contributions of others, managing and resolving conflict when appropriate
- Suggest alternative ways to get the job done without compromising the principles and policies of the service
- Lead, support, value and motivate other members of the team, sharing information as appropriate to achieve high performance
- Understand your rights and responsibilities in the workplace including promoting equality of opportunity and upholding the principles and policies of the service, identifying and raising concerns about service provision with more senior staff or trustees
- Make best use of resources including time, to achieve agreed goals for service delivery
- Make strategic decisions and be responsible for own actions and the actions of your team, reflecting on own practice and encouraging others to reflect on theirs
- Be responsible for the direct delivery of a service, assessing and managing risk

Skills in communication, mathematics and use of information technology (IT)

Communication and customer care

- Listen to and understand complex information, both implicit and explicit from a range of sources
- Use effective questioning techniques to gather and appreciate the complexity of a range of views
- Respond constructively and appropriately to queries and complaints
- Negotiate confidently in a manner that suits the situation
- Show sensitivity and use appropriate language for the situation, leading by example and influencing others effectively
- Communicate and debate professional issues and findings from own service area with experts and non-experts in the area of work
- Write effectively for a range of situations and contexts, ensuring the honesty, transparency and integrity of information conveyed

Mathematics

- Extract, select, compare and discuss relevant mathematical information from a range of sources
- Decide what needs to be calculated and use appropriate calculations, checking for accuracy
- Observe and record data using appropriate methods, tools and technology for complex audits, bids, research campaigns, evaluations or projects
- Present and explain results clearly and accurately using the most appropriate numerical, graphical or written format for the purpose
- Evaluate the design and operation of services with the aim of improving efficiency and effectiveness
- Undertake financial transactions working within organisational processes and policies
- Where relevant manage a work area budget and the cost-effective purchase and maintenance of assets

Use of IT

- Use technology to plan work effectively and to evaluate the effectiveness of the system used
- Troubleshoot straightforward problems

Teamwork: team working skills and attributes needed for the provision of high quality advice services

Working with others

- Work with others towards achieving shared goals, ensuring that a team's purpose and objectives are clear and achievable
- Respect and be open to the thoughts, opinions and contributions of others, including clients, colleagues, and partner organisations
- Recognise and respect people's diversity, individual differences and perspectives
- Learn from your mistakes and accept and give feedback in a constructive and considerate manner
- Contribute to, lead and manage a team by sharing information and expertise
- Manage and resolve conflict when appropriate and understand the role of conflict in a group to reach solutions
- Lead and/or support others when appropriate, motivating and developing others to achieve high performance
- Review the operational impact/outcome of the work or team and evaluate the impact on quality and return on investment

Solving problems

- Demonstrate innovation, advanced problem solving and mastery of methods and approaches in complex and specialised areas of work
- Assess situations and identify the root cause of a complex problem in environments that are unfamiliar, complex and unpredictable and have many interrelated factors
- Seek different points of view, including the views of clients, colleagues and partner organisations, and evaluate them on the basis of facts and evidence
- Readily use theoretical and practical knowledge to think, gain and share information, solve problems and make decisions
- Be creative and innovative in exploring and implementing solutions to enhance the quality and effectiveness of service provision
- Develop new skills in response to emerging knowledge and techniques to make recommendations or decisions
- Evaluate solutions to make recommendations or inform decisions for improvement

Personal: personal skills, qualities, values and behaviours that contribute to the provision of high quality advice services

Demonstrate positive attitudes, values and behaviours

- Undertake the work with honesty, integrity and transparency
- Recognise, and reflect on your own and other people's good efforts
- Engage and show interest in your work, taking care of your personal health and wellbeing, including resilience, hygiene and appearance
- Identify and suggest alternative ways to get the job done whilst maintaining the principles and policies of the service

Be responsible

- Meet timekeeping and attendance requirements whilst managing the balance of your work and personal life
- Lead on health and safety practices and policies to promote wellbeing
- Understand your rights and responsibilities in the workplace, including your responsibility to identify and raise any issues relating to service provision with more senior staff or trustees
- Lead on implementing best practice in terms of equality of opportunity and valuing diversity in the workplace
- Understand and respect the principles and policies of the service including client confidentiality and data protection
- Consistently evaluate your own practice, plan and manage time, money and other resources to achieve goals
- Take responsibility for own work area, striving to provide a high quality and effective service
- Assess, weigh and take steps to minimise and manage risk and be accountable for your own actions and the actions of your team, through effective leadership

Be adaptable

- Carry out multiple tasks or projects, be open and respond constructively to change and cope with uncertainty

Learn continuously

- Take responsibility for your own learning and be willing to continuously learn and grow, reflecting on own practice and encouraging others to plan for their own learning, development and progression
- Assess personal strengths and areas for development, identify own learning goals
- Identify, access and make use of relevant learning resources and opportunities, plan and achieve your learning goals

Appendix 1 - The Employability Matrix

The Employability Matrix was developed in 2007 as part of the *Skills for Business Network Employability Guide - A Skills Toolkit for Employers*.

It was created in response to series of research based focus groups and employer engagement work across several sectors in the UK. Employers were asked to report what skills they expected from their employees. This information provides a useful tool for employers, employees and anyone involved in making sure people have the skills they need to get work and stay in work.

The matrix can be used in a number of ways:

Employers can use the matrix as a checklist to see which of the skills they need for staff to be effective in their job roles. This information can help produce job descriptions, inform recruitment and selection practices and assist you to identify training needs among existing staff.

Employees can use the matrix to help them understand employer expectations and as a prompt for CVs, job applications and identifying areas for self-development.

Training providers and education institutions can use the matrix to inform the development of their course and programme materials or target specific skills to offer bespoke training for employers.

The matrix is deliberately generic so it can apply to a greater number of users. The statements can be put in context to make more sense for your operating environment.

A Fundamental Skills: the skills needed as a base for further development

A 1 Communication

A 1.1 Read and understand information shown in a variety of ways (eg, words, graphs, charts and pictures)

A 1.2 Write and speak so others pay attention and understand

A 1.3 Listen and ask questions to understand and value other people's points of view

A 1.4 Share information using ICT such as email and telephones

A 1.5 Use science, IT and maths skills to explain ideas and make them clear

A 2 Use numbers

A 2.1 Decide what needs to be measured or added up

A 2.2 Watch and write down data in the correct way using the right tools

A 2.3 Make estimates and check calculations

A3 Manage information

A 3.1 Find, gather and organise information using IT and IT systems

A 3.2 Access, analyse and apply knowledge and skills from a number of areas (eg, the arts, languages, science, technology, maths, social sciences)

B Personal Management Skills: the personal skills, qualities, attributes, attitudes and behaviours that drive one's potential for growth

B 1 Demonstrate positive attitudes and behaviours

B 1.1 Feel good about yourself and be confident

B 1.2 Display positive body language

B 1.3 Deal with people, problems and situations in an honest, true and decent way

B 1.4 Be aware of your own and other people's good efforts

B 1.5 Take care of your own health and hygiene

B 1.6 Show interest, initiative and effort

- B 1.7 Make sure that the way you look and the way you dress suits the place you work
- B 1.8 Be able to travel to work on their own (if necessary)
- B 1.9 Turn up to work on time (or let employer know why you will not be there on time)

B 2 Be responsible

- B 2.1 Set goals in order of when they should be done
- B 2.2 Make sure home and work life are balanced
- B 2.3 Manage your own personal finances
- B 2.4 Plan and manage time, money and other resources to achieve goals
- B 2.5 Assess, weigh and manage risk
- B 2.6 Be answerable for your actions and the actions of your group
- B 2.7 Be socially responsible and contribute to your community
- B 2.8 Act responsibly with alcohol and medications
- B 2.9 Be aware of law on the misuse of substances

B 3 Be adaptable

- B 3.1 Work on your own or as part of a team
- B 3.2 Carry out multiple tasks or projects
- B 3.3 Find and suggest new ways to achieve goals and get the job done and achieve goals
- B 3.4 Be open and respond well to change
- B 3.5 Learn from your mistakes and accept feedback
- B 3.6 Cope with uncertainty

B 4 Learn continuously

- B 4.1 Be willing to keep on learning and find ways to improve yourself
- B 4.2 Look at what you are good at and what you need to improve
- B 4.3 Set your own learning goals
- B 4.4 Identify and access learning sources and opportunities
- B 4.5 Plan for and achieve your learning goals

B 5 Work safely

- B 5.1 Be aware of own and group health and safety rules and act in line with these

C Teamwork Skills: the skills and attributes needed to contribute effectively

C1 Work with others

- C 1.1 Understand the roles people play in a group and how you can best work with them
- C 1.2 Ensure that a team's purpose and objectives are clear
- C 1.3 Be flexible: give respect, be open to and supportive of other people's thoughts, opinions and contributions
- C 1.4 Accept and respect that people are different and may have different views and ways of working
- C 1.5 Accept and provide feedback in a positive way
- C 1.6 Help a team by sharing information and skills you are good at
- C 1.7 Lead or support and motivate a team to achieve high standards
- C 1.8 Understand the role of conflict in a group to reach solutions
- C.1.9 Manage and resolve conflict

C 2 Think and solve problems

- C 2.1 Tell a person in charge if there is a problem
- C 2.2 Assess situations and identify problems
- C 2.3 Ask for other points of view and assess them based on facts
- C 2.4 Be aware of how a problem can be down to different reasons such as people making mistakes, PCs not working how they should, people not speaking or listening well enough
- C 2.5 Find the cause of a problem
- C 2.6 Find new and creative ways to solve a problem
- C 2.7 Be happy to use science, IT and maths as ways to think, gain and share knowledge, solve problems and decide what to do
- C 2.8 Evaluate solutions to help give advice or recommendations
- C 2.9 Implement solutions
- C 2.10 Continuously monitor the success of a project or task and identify ways to improve

C 3 Participate in projects and tasks

- C 3.1 Carry out a project or task from start to finish with well laid out aims and outcomes
- C 3.2 Plan or design a project or task from start to finish with well laid out aims and outcomes
- C 3.3 Develop a plan, ask for feedback, test, change plan if needed and put into action
- C 3.4 Work to agreed quality standards and plans
- C 3.5 Use the correct tools and machines for a task or project

C 3.6 Adapt to changing requirements and information

C.3.7 Always check how well a project or task was carried out and find ways to make it better

C 4 Customer care

C 4.1 Talk and listen well to customers

C 4.2 Help customers and deal with their questions and problems

C 4.3 Develop productive relationships with customers

C 4.4 Build customer confidence in the level of service

Appendix 2 – The Get Digital Basic Digital Skills Framework

Get Digital is the Tech Partnership's campaign to give everyone access to the basic level of digital skills they need for life and work in an increasingly digital world. Through a range of resources, Get Digital supports people to develop digital capabilities, including as the first step on the ladder to learning more advanced and specialist tech skills.

According to the Tech Partnership

21% of adults and 49% of charities lack basic digital skills

See the following websites for an overview of the framework and a self-assessment tool

https://www.thetechpartnership.com/globalassets/pdfs/basic-digital-skills-standards/basic_digital_skills_framework.pdf

<https://www.thetechpartnership.com/globalassets/pdfs/basic-digital-skills-standards/basic-digital-skills-assessment-questions.pdf>