



Guide to identifying your own learning and development needs

Guide 2

For caseworkers, specialist advisers, casework
supervisors and advice session supervisors

Advice Skills Academy – creating a new learning culture

The Advice Skills Academy is an ESF-funded project designed to develop higher level skills and enhance the career prospects of employed beneficiaries across the Liverpool City Region.

The project is being delivered by a partnership of 7 local Citizens Advice services and the Women's Organisation.

It will co-ordinate the provision of learning and development, focusing on a wide range of workplace opportunities as well as the more traditional classroom based courses.

In turn, this will lead to an increased take-up of more cost-effective learning and development opportunities.

More importantly, it will create a new, positive learning culture, where individual staff take the lead in managing their own learning and development and where project partners learn and develop at both organisational and city region level.

How people learn – 70:20:10

70:20:10 is a model which suggests that 70% of learning takes place through experience (trying things out; learning by doing; practising) - 20% through others (social, discussion, mentoring, observation) – and 10% through formal structured learning (such as classroom courses and qualifications.)

If the majority of learning and development comes through experiential and social learning in the workplace (the '70' and '20') rather than through formal classes and courses (the '10'), organisations may benefit from increasing their support for less formal workplace learning, rather than continuing to invest almost all of their resources on traditional classroom based courses and qualifications.

The Advice Skills Academy will encourage an increased focus on '70' and '20' types of learning by commissioning, developing and promoting activities such as coaching, mentoring and reflective practice.

Who is responsible for your learning and development?

Your employer is responsible for making sure that you are able to do your job competently and should help you to become competent and keep your knowledge and skills up to date by offering suitable learning and development opportunities.

But ultimately, you are responsible for your own learning and development.

Even when you attend a mandatory training course, it is up to you how much you learn and how you apply that learning in the workplace.

The ability to take responsibility for your own learning and development is an essential skill for everyone, regardless of where they work or what job role they have. For more on this see *Transferrable Skills – a competency framework for the Advice Skills Academy*.

Being responsible for your own learning and development also means being in control. Follow this step by step guide to get the learning and development that's right for you.

How to identify your own learning and development needs:

Step 1 – find out if there is anything you need to do as part of your *organisation's* learning and development plan

Talk to your line manager or training officer to find out about the learning and development that is planned for the organisation as a whole.

This may include some mandatory training for some or all staff such as GDPR compliance, or first aid. It may also include other types of learning and development activity that you need to add to your own plan.

Step 2 – review the competencies required for your current job role

A bank of competencies for different job roles is available on the Advice Skills Academy website. These include frameworks and sets of competencies developed by Citizens Advice, representative bodies for specific sectors or professions, membership organisations and the Advice Skills Academy project team.

The competencies required for casework, specialist and advice/casework supervision roles are:

- Transferrable Skills – a competency framework for the Advice Skills Academy
- Citizens Advice competencies for advice roles:
 - Adviser learning programme
 - Email
 - Outreach
 - Mental health
- Citizens Advice competencies for casework and specialist roles (where applicable):
 - Debt casework
 - Specialist debt advisers
 - Benefits casework
 - Housing casework
 - Employment casework
 - Consumer casework
 - Immigration casework
 - Immigration specialist adviser
 - Casework supervision

- Citizens Advice competencies for non-advice roles (where applicable):
 - Financial capability trainer
- Citizens Advice competencies for support roles (where applicable):
 - Core
 - Quality assurance
 - Advice session consultancy
 - Supervision/appraisals
 - Contact centre supervision

Please note that if your job includes other responsibilities in addition to casework, specialist advice or supervision, for example developing or delivering training, you will need to look at other guides in this series to find out which additional competencies are required for your particular job role.

It's up to you to decide how detailed a review you want to do. If you wish, you could do a structured, formal review, giving examples that demonstrate how you meet each competency in your day to day work, and describing in detail any improvements that you wish to make.

At the very least, you should browse through all of the competencies listed above to identify any key areas to focus your learning and development on within the next few months.

Step 3 – review the competencies required for any new tasks or changes to your current job role that you expect within the next 12 months

Once you have reviewed the competencies for your current role, think about any new tasks or responsibilities that you are going to take on within the next year, or any changes to your job role that you expect.

If you think there are going to be any changes, look at other guides in this series to find out which competencies are required for the new roles or responsibilities that you will have.

As in step 2, identify any learning and development needs that you have in relation to the competence requirements for the new or changed role.

Step 4 – reflect on your own personal learning and development needs, including anything that would support your health and wellbeing

As well as specific competencies for your current and future job role, you may have other skills or knowledge you would like to develop that would help you in work or in other aspects of your life. For example

Do you need to become more confident or assertive?

Do you need to manage stress or anxiety better, or develop greater personal resilience?

Would you like to brush up on your English or maths so you can help your children with their homework?

Would you like to learn a new language or a creative skill or craft?

Would you like to learn about nutrition and healthy cooking or get involved with a local community activity or group?

Step 5 – think about any longer-term career development ideas or aspirations that you might have

Think about what you might like to be doing 2, 5 or 10 years from now and what learning and development might help you to get there. For example

Would you like to be earning more and/or working more hours?

Would you like to be working fewer hours or taking retirement?

Would you like to continue with exactly what you're doing now?

Would you like to take on more responsibility or get promoted?

Do you want to stay with your current employer or in the same sector?

Are you thinking about self-employment or a change of direction?

Step 6 – download and complete **ASA Learning and Development planning Template 2**

Use the template to note down a brief summary of all the ideas you have come up with.

When suggesting ways to meet your learning and development needs, remember to include '70' and '20' options as well as traditional courses and qualifications.

Though you don't need to write precise learning objectives at this stage, be clear what success looks like, or how you will know when your learning and development needs have been met.

Also consider the types of learning and development that you prefer and the times that you are available and at your most receptive for learning.

Once you have noted everything down, you are ready to meet with your line manager or training officer to turn your ideas into an action plan.

Planning to meet your identified needs

The next stage is to meet with your line manager or training officer to discuss options for meeting your learning and development needs.

They will want to help you find ways of meeting all of your learning and development needs but may need to prioritise some above others, especially if there is a cost to the organisation in terms of finance or time (yours and/or other people's.)

Remember that you are responsible for your own learning and development and that you are in control. If your employer is unable to allocate budget or time to the learning and development needs you have identified, there are probably other ways you can achieve your goals. Have a look at the Advice Skills Academy website for ideas on how to meet your learning and development needs.

Reviewing your progress and keeping on track

When you create your learning and development plan, you will agree how and when any progress will be monitored.

Regardless of how this is done, you will need to establish a habit of regular self-reflective practice, setting time aside to make sure this is unrushed and useful to you.

Self-reflection means stepping back from your work to consider:

- How you think you are performing
- What you think you have learned from your experience
- What you might do differently in the future.

You could think about something you've done well or something you could have done better.

Note down your thoughts on **ASA Learning and Development planning Template 4**.

This can then be used to help with progress monitoring and to feed into future versions of your individual learning and development needs/plans.