

## TRAINING SESSIONS

AdviceUK is funded through London Councils to provide FREE training sessions to members and other organisations within your borough.

The training sessions give a practical introduction to key advice specific areas aimed at social welfare law advice giving organisations. Below is a list of the training sessions on offer which are mostly half-day sessions. If you are interested in offering any of these training sessions in your borough please contact AdviceUK: on Telephone: 0300 777 0107 or e-mail: [wesley.harcourt@adviceuk.org.uk](mailto:wesley.harcourt@adviceuk.org.uk) to book a training session

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### Business Planning for Advice

Appreciate why planning is useful and necessary.

Participants will have an overall picture of the planning process and practical experience of some tools for creating a business plan. Understand how the plan should link to the local advice strategy and meet the requirements of advice related quality assurance systems.

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### Case Recording and File Management

Recognise why case records need to be maintained and be aware of the specific information that needs to be recorded in any particular case.

Participants will recognise the advantages and disadvantages of different methods of case recording, plus file management and collecting statistics; recognising the advantages and disadvantages of different filing systems, and be aware of what should be kept on a file.

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### Complaints & User Feedback

Appreciate why a complaints procedure and user feedback systems are necessary.

Participants will understand how to use complaints and user feedback as a tool for service development; identify a complaint and recognise a Professional Indemnity claim. Understand how a complaints procedure should operate and be aware of the different methods of user feedback

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### Confidentiality & Conflicts of Interest

To raise awareness of the principle of Confidentiality within advice centres and how it operates in different situations.

Participants will understand the importance of confidentiality in an advice centre; have knowledge of the legal framework; understand how confidentiality works in practice and who it relates to; recognise those situations when confidentiality may need to be breached and what a conflict of interest is; and provide the means to develop an appropriate confidentiality policy for your agency.

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## **Fundraising**

The following three sessions each cover a different aspect of fundraising. They can be delivered as stand-alone sessions, as a course of three sessions or as a mixture tailored to the needs of your advice centre.

### **1. Fundraising for your Advice Service**

As more services are either commissioned or put out to tender so this session looks at the differences in terminology used and how putting together a tender differs from writing a funding application.

Participants will effectively plan a project to achieve successful fundraising, accurately cost your project, avoid common funding pitfalls, identify potential funders for your projects and increase your confidence and ability to complete funding applications.

**This session is offered as a full-day session only.**

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### **2. Developing a fundraising strategy**

Participants will recognise the link between strategic planning and successful fundraising, identify the key elements of a fundraising strategy, Utilise tools for developing a fundraising strategy.

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### **3. Full Cost Recovery for Advice**

Participants will understand the concept of full cost recovery, be able to start analysing the costs within their organisation, understand the link between full cost recovery and the longer term sustainability of their organisation and be able to prepare a budget on a full cost recovery basis

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### **Monitoring and evaluating your advice service**

Participants will be able to distinguish between monitoring and evaluation, will understand the need for monitoring and evaluation, will gain practical experience of aspects of a monitoring and evaluation process and have an overview of constructing and drafting an evaluation report or plan.

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### **Outcomes for Advice**

Unpack the terminology associated with outcomes such as milestones, targets and indicators, share the benefits of an outcomes approach, give tips on how to measure and present your outcomes, link outcomes to your organisation's aims, look at examples of outcomes from funders including London Councils, The Big Lottery Fund and Trust for London.

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### **Making accurate Referrals**

Participants will understand what signposting, referral and use of experts are. Identify when it is best for the client to be referred elsewhere for advice and assistance. Understand the barriers to referral and how to overcome them, understand how to make a referral and what needs to be included in a referrals procedure.

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### **Setting up an Advice Service**

Participants will have the ability to identify if an advice service is the best way for an organisation to meet the needs of its clients, an appreciation of the need to define the new advice services accurately, an understanding of how an advice centre can structure its advice sessions and knowledge of the key policies and procedures for an advice centre.

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## **Supervision and File Review**

To recognise the benefits to staff and to clients of maintaining effective supervision and file review. Participants will be able to appreciate the skills necessary to be a good supervisor and to be aware of the two kinds of supervision involved in a working environment, what the supervisor's role includes, file reviews as a means of ensuring quality, how to carry out a file review, how file reviews fit within the supervision process and how the supervisor should be able to carry out a file review in your own organisation.

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## **What is legal advice?**

Participants will be aware of the difference between legal advice and Information, Advice & Guidance (IAG), counselling and advocacy, understand levels of advice and why giving legal advice is different, understand how legal advice operates in a holistic setting and the regulation of advice such as by the Office of the Immigration Services Commissioner (OISC).

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## **Methods of advice delivery**

Examine the current methods of advice delivery such as telephone advice, drop-in sessions, triage, appointments and e-mail looking at the advantages and disadvantages and protocols for each. Participants will be introduced to the different models of advice centres and will gain a knowledge of the advice networks that can offer them support.

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## **Risk assessments**

- What is a risk assessment
  - Assessing risk
  - Risk management
  - Developing a risk assessment template
  - Business continuity and disaster recovery planning
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## **Governance Training for Management Committees/Boards of Directors/Trustees**

### **Roles and responsibilities of a management committee**

- What is a Management Committee member?
- What is Governance and how does it differ from management?
- Board roles and responsibilities
- Recruiting new members
- Committees
- Conflicts

### **Strategic planning for management committees**

- Mission statement
- Needs analysis
- SWOT analysis
- Strategic planning
- Costing the plan
- Risk assessments
- Monitoring the plan

### **Finance for MC members**

- Terminology
- Roles and responsibilities
- Budgets and cash flow
- Management accounts
- The balance sheet
- Reserves
- Audits

## Human resources

- Duties of the MC as an employer
- Legislation
- Recruitment - shortlisting and interviewing
- Induction
- Discipline and Grievance

## The advice and regulatory environment

- The policy issues relevant to advice
- The regulatory issues relevant to advice
- Office of the Immigration Services Commissioner (OISC) regulations
- The environment advice centres operate in
- Quality standards for advice

## INFORMATION UPDATE SESSIONS

AdviceUK can offer information support sessions to members on occasional topics such as:

### Advice sector policy overview

An information session providing a strategic map to update organisations on the latest initiatives affecting the advice sector from policy bodies such as the Ministry of Justice and Government, the Legal Aid Agency, Office of the Immigration Services Commissioner (OISC) updates, commissioning, funders and local government.

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### Closing down

Advice to groups facing cuts on issues to be aware of when they may have to close their organisation down, such as notifying clients, what to do with client case files, protecting against future claims, issues with funders and personnel areas such as redundancy and notice.

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## AdviceUK Training courses

As well as the above training sessions AdviceUK can also offer the following paid for training courses. Look at our current training brochure here:

[www.adviceuk.org.uk](http://www.adviceuk.org.uk)

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*Funded by:*

