

# Community learning and development (CLD): independent review

## Citizens Advice Scotland (CAS) Response

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Scotland's Citizens Advice Network is an essential community service<sup>1</sup> that empowers people in every corner of Scotland through our local bureaux and national services by providing free, confidential, and independent advice. The Citizens Advice network across Scotland helped over 187,100 people in 2022-23, resulting in £142.3 million being unlocked for clients to use in their local communities. The advice we provide is life-changing and often life-saving. The Citizens Advice network and the broader third sector landscape play a critical role in terms of upholding and improving personal and collective wellbeing.

The benefits of advice reach far beyond the quantifiable financial gains for clients. We put people first to improve living standards and reduce poverty. Feedback from our national welfare rights and income maximisation services found that 93% of clients report improved peace of mind. Moreover, we use this unique evidence base to advocate for consumers and influence long-term structural change. Of the volunteers whose journey is known, 42% of those leaving the service go on to paid employment or further education and many other volunteers report improved wellbeing and reduced social isolation through the lifelong learning undertaken within our network.

### Key messages

- **The third sector plays a critical role in terms of supporting the personal development and learning of individuals and this should be visibly recognised and acknowledged in the forthcoming review.**
- **Third sector organisations can play a unique role in the design of learning and development systems and approaches that put wellbeing front and centre – because we understand the experiences of people who are vulnerable or remote from formal learning pathways.**
- **Any subsequent review of public funding models for community-based learning needs to increase the accessibility of resourcing to third sector organisations such as Citizens Advice Bureaux (CABs).**
- **Even at this early stage in the review, it is crucial to make connections between the outcomes of this Independent Review and planned legislation focussed on Community Wealth Building (CWB) and the Wellbeing Economy in Scotland.**

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<sup>1</sup> [essential community services briefing 1.pdf \(cas.org.uk\)](https://cas.org.uk/essential-community-services-briefing-1.pdf)

## AWARENESS AND VISIBILITY

CABs efforts and delivery of CLD opportunities is almost invisible. We hope the independent review will be a catalyst to the reconstruction of the skills landscape and undertaking of a more robust resourcing concept and policy definition for CABs and other voluntary organisations contributions in this space.

We seem to be as a sector and specifically as a network of locally based Citizens Advice Bureaux (CABs):

- culturally invisible, not seen as having a place at the table nor any profile for delivering community-based learning through our robust and high-quality adviser training programme<sup>2</sup>
- operational invisibility as we don't get access to the funding yet deliver the outcomes; and
- spatially invisible as we are missing from the Skills landscape map and any subsequent policy or funding discussions.

Each of these facets or intersects of invisibility of CABs in this policy area, obscures the fact that outcomes are delivered and therefore contributes to its economic devaluation and further invisibility of the sector. Contributing to the further dilution the unique delivery of CAB services of advice, advocacy and learning, camouflaging our multiple successes to funders and wider actors, rendering these invisible.

We need the learning and development landscape of Scotland to change and focus on valuing our sectoral contribution and putting it on the map, so that we are being recognised for our contributions and being included in major decision-making processes within this landscape. For example, in any of last year's big 3 "Skills landscape" reports, we were almost completely missed/invisible and we are barely mentioned in any of the 15 recommendations from Withers especially. Alongside our views on other recent National Strategy for Economic Transformation (NSET) related topics such as Community Wealth Building (CWB)<sup>3</sup> and Sustainable Development and Well-being Bills<sup>4</sup> we need to ensure visible valuation of the Voluntary Sector and volunteers within these systems and future structures.

As a sector we need the opportunity to lever these strengths and seek to change funding and resourcing and operational learning pathways, so that we can meet the twin aims of advice and advocacy and continue to give learning and development opportunities that are well-resourced for them personally but also enable them in a professional sense to give back to their communities, building community wealth and wellbeing. We see many volunteers' advisers / learners moving into paid roles with CABs or other bodies within the social justice/wellbeing sectors, but we need the platform and profile to be visible to many stakeholders and funders to change current models of resourcing skills delivery.

For example, every new CAB trainee adviser completes the Adviser Training Programme (ATP)<sup>5</sup> in preparation for the role as generalist adviser. This blended learning programme includes practice and assessment, as well as guidance and support, and enables trainees to gain the knowledge, skills and attitudes that are required of their role. CAS provides materials and resources to enable bureaux to deliver this programme. Trainees can access the programme online through our online learning management system, CASlearn, as well as delivered training sessions. It takes approximately 6 months – sometimes longer depending on individual circumstances - to qualify as an adviser.

<sup>2</sup> [The Citizens Advice Network Adviser Training Programme - Overview | Rise 360 \(articulate.com\)](#)

<sup>3</sup> [Community Wealth Building Briefing | Citizens Advice Scotland \(cas.org.uk\)](#)

<sup>4</sup> [Wellbeing and Sustainable Development Bill | Citizens Advice Scotland \(cas.org.uk\)](#)

<sup>5</sup> [2023 - 07 adviser training summary sheet - advisers.pdf \(cas.org.uk\)](#)

Member CABs deliver the ATP, which includes mentoring stages, either in and from individual Bureaux premises and/or remotely using Zoom taking advantage of the remote ATP developed during lockdown; making use of the in-built functionality including screen-sharing, polls and breakout rooms to deliver to any volunteers across Scotland.

We hope to progress at pace with the initial work done with Scottish Credit and Qualification Framework (SCQF) Partnership and Scottish Qualifications Authority (SQA) to understand the process of obtaining accreditation of the ATP. We have had initial discussions to scope and assess the options available and understand from SQA that our ATP would be a good fit and can be transferred onto the framework, albeit this will require significant work but we think will produce skills outcomes that should be resourced from public funding models given the dual benefits to communities upskilling but also well-being.

## **ACCESSIBILITY and AVAILABILITY**

We have real concerns for future generations of CLD learners and volunteers generally. We are under-resourced as a sector and collectively we feel almost invisible or taken for granted in the CLD sector for the outcomes we deliver. The Scottish Parliament is expected to pass Community Wealth Building and Wellbeing/ Sustainable Development Bills over the next year session. We believe the work of Citizens Advice Bureaux should be recognised in the Bill and that of the wider volunteering sector. Across the country CABs unlock financial gains, advocate for change as well as provide employment, skills and/or volunteering opportunities for local people. For example, board governance skills for our CAB Trustee volunteers, digital skills for volunteers and employees and financial literacy skills to clients. Our view is this is currently something we are not maximising to its full potential in a CWB or Well-being sense for local communities nor getting the recognition for volunteers for loving their communities and learning within them. This extends to the role of CABs in enabling community-based learning as a part of a wellbeing economy vision for Scotland.

We hope the finalised proposals for both Bills in Scotland would recognise the voluntary sector and the volunteer-led Citizens Advice Network in Scotland. The Citizens Advice network will stand to help people through these challenges, just as we have adapted and innovated for 80 years to meet the challenges of each generation. Our advocacy and campaigning will highlight the risks and solutions to policy makers, while our advice will continue to unlock millions of pounds for citizens in Scotland. Independent advice and advocacy should be an integral part of the Scottish CWB strategy, an additional sixth pillar to that economic model, as a mechanism that drives local economic development, maximises local incomes and delivers learning and development opportunities for members of local communities.

The foundations of a community wealth building agenda should be funded on a long-term cycle, 5-year cycle to give CABs the stability to provide their services and deliver their role in community wealth building. CABs are and have always been anchor institutions within and for their communities. Every day they make a significant contribution to an existing strategy of poverty reduction, dignity and building and maintaining community wealth in Scotland.

This long-standing contribution of voluntary sector actors should be recognised in the forthcoming Bills, with:

- The inclusion and recognition of the Third Sector in Community Wealth Building and Wellbeing Bills.
- Recognition in the Bill of the wealth delivered by volunteers and their contributions towards CLD, CWB and Well-being aims; and

- An additional sixth pillar of CWB Scottish Model that focuses on wellbeing to reflect non-financial rights-based wealth building including community-based learning and development.

Previously as part of this community wealth building work, we delivered CLD outcomes as a “free good” in previously less stringent financial times, as a by-product of funding our unique volunteer-led, community-based advice and advocacy service. This upskilling not only enabled community members to access their rights but also upskilled volunteers who went onto further education, training and employment. In the past, CLD and wider Skills landscape stakeholders could consume or rely on as much “free” quantity of upskilling to be done by CABs across Scotland without a consumption cost, but those times have gone and so has the surpluses in service agreements that was understood to fund or contribute towards these wider outcomes. However, as demand increases and we are forced by funders to focus on their visible frontline outcomes of advice and advocacy, the invisible but welcomed skills outcomes will diminish. This will have an increasing impact on the informal and invisible delivery of CLD outcomes in Scotland from our network. For within our bureaux network taking away this wider focus will have a real impact on the capacity to support the volunteer effort and associated CLD outcomes for those community members and subsequently reduce our ability to maintain service levels in the face of ever-increasing crisis demand. A lose-lose situation so to say.

We know from over 80 years of volunteer experience as a network that volunteers don’t just train and supervise themselves but with less funding for advice services, we will be faced with the choice of supporting community members CLD aspirations and supporting community members with the ongoing cost-of-living crisis. This is a choice we would like to make visible and the highlight the financial costs of Scotland continuing to view CLD provision via networks like CABs as a free good or by product of delivering advice services in a much tighter fiscal environment of public sector service delivery budgets. The voluntary sector needs greater access and profile in these skills landscape funds to deliver for people in crisis but maintain our volunteer-led learning and development model to continue to enable us to help citizens learn whilst volunteering or working to advise communities across Scotland.

## **SUPPORT AND LEARNING**

The question posed in the consultation was how advice services could link up better with CLD. We think we are already an example of a more joined up approach between CLD, advice, employability and mental health/wellbeing support. Whether this is direct learning as an adviser or learning as a client through financial literacy and budgeting advice. For our network we would also like the question to be how should the skills sector recognise the need for CLD learning funding to help resource such services and the opportunities they give to community-based learners. Volunteering can help improve employment prospects and acts as a route to employment but also enables lifelong learning improving mental health and a different pathway to learn skills for those that didn't enjoy learning or have access to learning through traditional educational pathways. Overall, our people powered service relies on over 1,500 volunteers, over a third of whom go on to further education or employment. Up and down the country CABs are upskilling local people and improving access to lifelong learning systems for all citizens. Yet we’ve never been formally recognised or resourced to deliver these significant annual national skills/learning outcomes.

A key focus in Scotland is on providing a skills development and learning environment where visibility of skills, meaningful discussion and reflection is prioritised. Such “Meta-skills” are the skills we will all need to drive innovation, create adaptive resilience, encourage entrepreneurial behaviour and ensure our future success, regardless of context. Learning and skills provision in Scotland in the future will need to develop, measure and reward meta-skills, acknowledging that these can only be developed

experientially. This is a real opportunity for the CAB service to be involved in their delivery by agencies in the current landscape given recently published reviews of the post-school learning systems in Scotland. These skills are not just to help us cope in this environment of ongoing change. They are skills to excel; to collaborate and empathise with others and to create our own individual and collective wellbeing futures.

In the context of CAB volunteering, they deliver the associated social value of community wealth building and access to justice alongside giving clear learning pathways without the “traditional” educational or even workplace system of skills provision. For our volunteers, meta-skills are encouraged and stimulated in every advice session and are reflected on as part of everyday learning in the service. These skills help build community wealth and rights by encouraging volunteers to be successful learners, confident individuals, and responsible citizens, as well as contributors to a service that delivers a fair and just Scotland for local communities. Volunteering in a CAB can allow volunteers to improve and accelerate their learning journey and embed both practical and meta-skills needed for future, see Appendix 1 for further information.

## **PATHWAYS AND PROGRESSION**

In terms of the wider NSET grounding of this independent review, it’s been disappointing to read an overt but understandable focus within these NSET national strategies or ongoing legislative proposals for Community Wealth, on formal training or learning pathways. Whether implied or explicit it ignores the contributions of those who have retired from the workforce or can’t join it and doesn’t reflect strategically the diversity of how individuals gain skills and learning within Scottish society. It also seems to ignore the impact that volunteering can have on getting people back to work in good jobs, with in work learning as a pathway to further work progression but also a valuable mechanism for supporting prosperity and wellbeing locally through community based learners/volunteers supporting themselves and other community members through delivery of mutual benefit e.g. in a CAB sense giving advice but also gaining skills and learning for advisers in the provision of such advice.

However, at the moment this is seen as an unfunded benefit of the CAB network. All bureaux across Scotland are volunteer led, independent organisations with boards of trustees; all make extensive use of volunteers, such as trained advisers and board trustees. Over 1,500 volunteers contributed more than 500,000 hours of their time in 2022-23, the monetary value of this contribution amounts to over £8m<sup>6</sup>. Volunteering at CABs not only provide benefits to local communities, but also volunteers themselves. Volunteering has a great impact on getting people back to work in good jobs, with 42% of CAB volunteers<sup>7</sup> move on to paid work or further education and those that are retired/economically inactive through personal choice are given lifelong learning opportunities with social impact rewards.

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<sup>6</sup> [Scotland - National Briefing Sheet 22-23.xlsx \(cas.org.uk\)](#)

<sup>7</sup> [scotland\\_13.pdf \(cas.org.uk\)](#)



## ANY OTHER VIEWS

Given the Scottish Government's 2023 Purpose and Principles of the Initial Priorities framework for decision making for post-school education, skills and research outlines an aim to ensure the system is fit for the future and includes a desired system outcome of delivering Public funding models for education, skills and research that are fair, transparent, and maximise value, we strongly urge the need for greater involvement and access for the voluntary sector to public funding models as a result of this review.

There seems to be a lack of trust of Voluntary Organisations delivering skills outcomes despite the many volunteers who give their time freely to deliver and assist with community-based learning and development. We hope that any new funding model for community-based learning will make a different choice in terms of enabling access and entrusting leadership to the voluntary sector to deliver national outcomes alongside other sectors. We need to ensure that the voluntary sector is directly involved and has visibility in deployment of any new funding model. We need mainstreaming of involvement and visible collaborative working in and between sectors of a Scottish wellbeing economy. We feel there seems to have been a custom and practice across all sectors of the Scottish economy and society, to take the CLD outcomes generated by the CAB network and wider voluntary sector for granted without resourcing. We don't want any new public funding model to be another missed clear opportunity to level up the playing field of the skills landscape and avoid previous models across the Scottish economy that ultimately builds a bypass around the voluntary sector almost completely but happily accepts the traffic in terms of community learners it delivers.

Our vision at CAS is to regenerate the volunteering opportunities offered by our network to citizens across Scotland to build resilience – for clients, volunteers and the network itself - in the face of the cost-of-living crisis and into the future. The impact of the cost-of-living crisis, building on other pressures, is well documented and we not repeat here. We are developing a programme of work to create solutions to the challenges described below and seek additional funds to build, expand and embed on that programme through the following initiatives to make lasting change for citizens and volunteers engaged in our network:

- Create New Volunteer Capacity - Advocacy Volunteers<sup>8</sup> - creating opportunities to specifically recruit and train local people to act as local agents of change.
- Increase Community Capacity - diversifying volunteers and roles through creating a variety of accessible, tailored volunteer roles that meet the needs of marginalized people. This approach will also increase the reach of CAB services into diverse communities. We will support people facing poverty and financial crises through national and targeted recruitment of much needed volunteers that were impacted in the pandemic.
- Create New Opportunities for Volunteers - developing a professional qualification mapped to our advisor training programme to address skills/learning deficits of our volunteers with a focus on opening up new opportunities for marginalised groups and those furthest from the workplace.
- Increase individual and network capacity - ensure community-led learning is maximized and shared to increase organizational capacity to embed structures, workflows and models across the network. A key part of enabling increased capacity will be peer to peer models for volunteers and managers alike.

We are currently seeking to expand and transform our established volunteer programmes, through building pathways for new opportunities for volunteering, and creating more community based and

<sup>8</sup> [Opinion: Building Community Wealth through Advocacy and Advice | The Herald \(heraldscotland.com\)](https://www.heraldscotland.com/opinion/building-community-wealth-through-advocacy-and-advice)

trusted upskilling and employment pathways for people in local communities. Using this approach will provide local people with a choice of volunteer opportunities, attract a more diverse range of volunteers, and support CABs as employers to create a more diverse workforce. We seek to attract volunteers from all walks of life and backgrounds to ensure that our services are representative and accessed by all. The aim is to increase the numbers and diversity of volunteers to meet the ever-increasing demand from our clients and empower local people to campaign for local change. This will in turn reduce the pressure on existing staff and volunteers and contribute to their wellbeing and improve retention rates, continuity and consistency for all.

This transformational work will create choice, opportunity, and enormous benefit to individuals: through increasing real opportunities, experience and training for people who face barriers to employment and capability to support those experiencing poverty, and to communities by boosting skill levels and income. To develop and achieve a future proofed, sustainable volunteer framework our ambition is to work both with people with lived experience and new technologies to increase the range of accessible opportunities, we will reach people from marginalised groups and consequently meet demand not only from existing client groups but also increase our reach.

We will work with our Network to create an accessible co-design programme alongside people who have lived experience. The programme will ensure we use participative engagement and feedback to inform a process of continual development and improvement. The initiatives outlined are at the heart of the volunteer strategy we are currently designing with, and based on the priorities of, the CAB network but it all requires access and resourcing from a new model of public funding to deliver national learning and development outcomes.

The Scottish Government's Adult Learning Strategy 2022-27<sup>9</sup> outlines the intention that they will increase cross policy support for the role of community-based adult learning in improving outcomes across policy areas including education, employability, health, social isolation, poverty reduction and justice. We would reiterate the need to include CWB and Sustainable Development and Well-being legislative agendas in this list.

The strategy itself outlines that potential benefits of learning in a community setting are less widely understood and recognised than mainstream education. Throughout the development of the Adult Learning strategy, Scottish Government heard that the lack of understanding of the benefits of adult learning impacts on the resources available to support adult learners. This links for us to the points around the invisibility of CAB based learning through volunteering in the skills landscape, even in the context of the recent UK Government Multiply<sup>10</sup> funding, this opportunity to support CAB clients and volunteers through these funds is not considered a strategic need nor potential intervention on a national basis.

The launch of UK Government's series of Levelling Up Funds over the last few years, which includes Multiply and other funds, represented a pivotal moment of investment in communities that could have allowed the voluntary sector to deliver enhanced outcomes for people in Scotland had it been allowed a more strategic, national role and if greater co-design of the first round of investment plans had been permitted. However, the current local and regional geography for implementing these funds means voluntary organisations with a national footprint have struggled to access funding or faced unnecessary increased costs of multiple bids, and the citizen has not had access to consistent national service outcomes or opportunities. Indeed, where we hoped volunteering and community led development

<sup>9</sup> [Adult Learning Strategy for Scotland 2022-2027 \(www.gov.scot\)](https://www.gov.scot/publications/adult-learning-strategy-2022-27/pages/1-introduction-to-the-strategy.aspx)

<sup>10</sup> [Multiply: funding available to improve adult numeracy skills - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/multiply-funding-available-to-improve-adult-numeracy-skills)

might have been a consistent national thread across these funds, it's at best been a patchwork in terms of priorities across the local investment plans produced at pace by councils in the Summer 2022.

This lack of national funding gateway means Scotland won't maximise the benefit from the significant potential additional contribution from national volunteer-led networks in the prevention and early intervention of many health, economic and social inequalities across Scotland. For example, there could be scope to use these funds to have the Citizens Advice network deliver a national community learning via volunteering project given the national footprint of the network, the holistic nature of the advice provided by CABs and the associated literacy and numeracy skills imparted through our advisor training programme.

The absence of a national funding pipeline, which used to exist with previous EU structural funds for community development, means the network is looking to deliver this work to address demand for service at a time of limited resources and capacity pressures, without any additional support. We are doing it because we believe there is value in it for communities across the country and an obvious role for our CABs to play, however we are also doing it during the worst cost of living crisis in living memory which is placing huge strain on staff and volunteers. Such funds should focus on outcomes for communities. We need real co-creation of actions across all sectors and Scotland in future rounds of these community development or upskilling funds. A proper social contract with the voluntary sector from all spheres of governance and especially in terms of funding and delivery of CLD outcomes.

The future upskilling funds and council/regional economic partnership investment plans need to focus on preventative spend, outcomes and relationships. They should represent longer-term ambitions than we presently see. They should also give due regard and trust the strategic expertise of the voluntary sector and allow us to focus on building community wealth and social improvement in terms of well-being and lifelong learning. The Scottish Government's Adult Learning Strategy outlines that Community-based adult learning should be valued as part of the wider education system and as complementary to other options and, as such, should be given equal status and stability in its funding. This is vitally important to deliver for the currently unfunded upskilling progressed through the CAB network and wider voluntary sector.

When discussing funding as part of the development of the Scottish Government's Strategy, respondent advised that flexible funding that allowed vulnerable communities to access learning and empowering learners to determine their own learning was an essential change needed to the current landscape of provision. The need for greater understanding of the benefits of community-based adult learning can also impact on uptake of learning opportunities. Adult learners told Scottish Government in the development of the Strategy that they are not often aware of the learning opportunities that are available to them.

In response the Scottish Government stated their ambition to remove this barrier and promote the wide benefits that are achieved through community-based adult learning and that they will evaluate the suitability and levels of funding arrangements for adult learning, assessing how these arrangements identify and meet demand, support progression, and how adult learners are included in decision making processes. The Scottish Government committed to increasing public awareness of adult learning opportunities, guidance and support nationally and locally through joined up and accessible messaging. However, we feel that we also need a commitment following this review process to look at how currently informal learning pathways such as those delivered by the CAB network are sustainably funded and resourced to the benefit of the learner in question but also the wider community receiving advice, advocacy and support from that learner in their role as a CAB volunteer.



## **Key messages**

- **The third sector plays a critical role in terms of supporting the personal development and learning of individuals and this should be visibly recognised and acknowledged in the forthcoming review.**
- **Third sector organisations can play a unique role in the design of learning and development systems and approaches that put wellbeing front and centre – because we understand the experiences of people who are vulnerable or remote from formal learning pathways.**
- **Any subsequent review of public funding models for community-based learning needs to increase the accessibility of resourcing to third sector organisations such as Citizens Advice Bureaux (CABs).**
- **Even at this early stage in the review, it is crucial to make connections between the outcomes of this Independent Review and planned legislation focussed on Community Wealth Building (CWB) and the Wellbeing Economy in Scotland.**

**Citizens Advice Scotland**

**March 2024.**

## **Appendix 1 overleaf**



Citizens Advice Scotland:

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# **Skills Delivery through Volunteering**





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# About us

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Citizens Advice Scotland, the Extra Help Unit and our 59 member bureaux together form Scotland's largest independent advice network. Our bureaux and national services provide Scottish communities a service that empowers people through free, confidential, and independent advice. We use people's real-life experiences to influence policy and drive positive change.

All bureaux across Scotland are volunteer led, independent organisations with boards of trustees; all make extensive use of volunteers, such as trained advisers and board trustees. Over **1,500** volunteers contributed more than **496,000** hours of their time in 2021-22, the monetary value of this contribution amounts to over **£7.7M**.

Volunteering at CABs not only provide benefits to local communities, but also volunteers themselves. Volunteering has a great impact on getting people back to work in good jobs, with **35%** of CAB volunteers move on to paid work or further education.



Staff and  
volunteers at  
Glasgow North  
West Citizens  
Advice Bureau

# Why do people volunteer at Citizens Advice Bureaux?

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CABs provide a variety of activities volunteers can undertake across different roles. People can become a volunteer adviser or administrator, get involved in social policy, fundraising, IT, communications, and social media - all while gaining skills, experience, and qualifications.

There are lots of reasons why people might want to volunteer at their local CAB:

- > You can learn new skills and improve your confidence in a stimulating environment.
- > You can help in a way that suits the time you can spare and the skills you can offer.
- > We provide a supportive learning environment through our comprehensive training and supervision programmes.
- > You'll meet get a buzz from helping yourself and those around you.
- > If you're looking for a job, volunteering in a bureau won't affect your benefits.
- > For people on a Board journey, volunteering as a CAB Trustee is good experience to have on their CV.



**“My previous roles were mostly about statistics. Here I feel we’re genuinely getting the chance to help people.”**

CAB volunteer

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Volunteering can help improve employment prospects and acts as a route to employment. Overall, our people powered service relies on over 1,900 volunteers, a third of whom go on to further education or employment. Up and down the country CABs are upskilling local people and improving access to lifelong learning systems for all citizens.

Yet we’ve never been formally recognised or resourced to deliver these significant annual national employability outcomes, especially the emerging focus on meta-skills.



**“The work can definitely be stressful at times, but I also find it extremely rewarding – especially when you can hear the client’s relief in their voice after you present them with options they weren’t aware they had,”**

CAB volunteer

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# Meta-skills

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A key focus in Scotland is on providing a skills development and learning environment where visibility of skills, meaningful discussion and reflection is prioritised. Meta-skills are the skills we will all need to drive innovation, create adaptive resilience, encourage entrepreneurial behaviour and ensure our future success, regardless of context.

Learning and skills provision in Scotland in the future will need to develop, measure and reward meta-skills, acknowledging that these can only be developed experientially. This is a real opportunity for the CAB service to be involved in their delivery by agencies in the current landscape given recently published reviews of the post-school learning systems in Scotland.

These skills are not just to help us cope in this environment of ongoing change. They are skills to excel; to collaborate and empathise with others and to create our own futures. In the context of CAB volunteering, they deliver the associated social value of community wealth building and access to justice alongside giving clear learning pathways without the “traditional” educational or even workplace system of skills provision.

For our volunteers, meta-skills are encouraged and stimulated in every advice session and are reflected on as part of everyday learning in the service. These skills help build community wealth and rights by encouraging volunteers to be successful learners, confident individuals, and responsible citizens, as well as contributors to a service that delivers a fair and just Scotland for local communities.

Volunteering in a CAB can allow volunteers to improve and accelerate their learning journey and embed both practical and meta-skills needed for future



**“A friend had volunteered at the Musselburgh bureau and said she really enjoyed it. And because CAB meant a lot to me personally, I wanted to join.**

**You go home feeling you’ve actually been able to help someone.”**

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**Yamuna Kunwar**

Volunteer at Musselburgh CAB

## Meta-skills

<b>Focussing:</b>	Active listening is required in client interviews to ascertain the key issues and relevant information. It requires observing verbal and non-verbal cues, then providing appropriate feedback to show attentiveness and gain client trust.
<b>Communicating</b>	Good communication skills are essential to create rapport, develop trust with clients, negotiate with third parties and represent clients in various formal settings.
<b>Curiosity</b>	The Adviser Training Programme delivers all the required skills, knowledge and attitudes to train competent advisers. This initial training inspires curiosity for some volunteers who wish to further explore topic areas and develop knowledge and skills in specialist areas.
<b>Integrity</b>	The Citizens Advice Network adheres to a set of principles (including confidentiality, impartiality, accountability). Everyone within the network works according to these principles. All training for volunteers is based on a set of competency standards which require working with integrity, and encompassing equality, diversity and inclusion.
<b>Feeling</b>	Empathy is essential for our volunteers to establish a rapport and create a client/adviser relationship that results in a good client experience and potentially better outcomes.
<b>Creativity</b>	Bureau advisers often adapt the provided learning materials to suit the needs of their own context and trainees. They regularly create additional materials for specific or emerging areas of advice based on frontline service delivery experience.
<b>Adapting</b>	Clients, their issues and the way in which they present themselves in CABs are wide and varied. The adviser must be flexible and adaptable to deal with each situation effectively and provide the best experience and outcome for the client. Staff and volunteers must be able to adapt to new and emerging areas of advice, projects, software, and embrace the necessary changes to ways of working.
<b>Collaborating</b>	Volunteers operate as part of a busy team in bureaux and as part of a much wider network across Scotland. They collaborate and support each other by sharing their knowledge, experience and expertise for the benefit of clients and bureaux.
<b>Sense making</b>	In client interviews, advisers must gather a lot of information and diagnose the client's issues so that the correct advice is given. Often clients present in an emotional state and provide a confused account of their situation. The adviser must ask for information and seek clarity to understand the issues and establish what the client wants.
<b>Initiative</b>	During client interviews, advisers are always alert to situations where there is unfairness or injustice. The Network relies on advisers using their initiative and raising them as social policy issues. The Network and CAS can then act on areas of social injustice.
<b>Leading</b>	Advisers spend a significant amount of time on casework for clients, ultimately enabling them to empower themselves in the future. They help clients to make appointments, write letters on their behalf, advocate and engage with other organisations on their behalf, and more. Volunteer trustees on individual CAB boards play a significant, strategic role in CAB leadership and vision.
<b>Critical thinking</b>	Advice giving is a clear example of where critical thinking is required. The adviser must identify issues, analyse the situation, research the topic and apply this to the client's specific situation. They then identify the correct advice and any potential implications for the client.

# Volunteering at a CAB can also help develop...

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## Universal Skills

Our volunteers develop core technical skills, such as literacy and numeracy, that are fundamental to success within the world of work and enable progression from foundational to advanced levels of upskilling.

For example, when navigating the social security system, our volunteers need to have the skills to check an individual's entitlement to means-tested benefits and navigate an increasingly digitally skilled environment for clients. This check generates an outcome that tells the adviser a range of benefits and tax credits a client and their household might be entitled to, how much they could expect to receive and the potential impact on other existing forms of income. These results need to be conveyed with active listening and empathy alongside numeracy, literacy and digital skills.

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## Digital Skills

There has been ongoing work to improve digital delivery of our services. For the next 2 years, we are working with the University of Edinburgh in a Knowledge Transfer Partnership to embed learning and change in service design across our network in a “no-code” manner.

Instead of crafting a new application from scratch, no-coders construct their own apps for clients by combining apps together like building blocks to create a new product.

No-code will help upskill the CAB network and increase its design capacity to better meet the needs of service users. It will enable the network to explore creative ways to engage service users of all ages and backgrounds to be involved to help us to develop, shape and evaluate our current services for the benefit of both the CAS network and our service users throughout Scotland. It will also increase the meta skills of volunteers engaged in delivering this continuous improvement in service quality and channel choice for clients.

We will give volunteers the chance to engage with the wider network of CABs to develop our digital offering, giving them chance to collaborate and adapt processes for the benefit of our clients, all while boosting their own skills and experience.

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## MATRICS Training

MATRICES is a partnership between Money Advice Scotland and Citizens Advice Scotland. Together, we provide a specialist training programme specifically for advisers in Scotland, allowing them to deliver Scottish Statutory Solutions to Scottish clients.

This training ensures a clear learning pathway for debt advisers and gives them the skills and knowledge to undertake the range of activities required to provide clients with high quality advice. It enables a continued module-based approach to work integrated learning opportunities as articulated by the recent Withers report. It also enables longer retention in the advice sector workforce of those wanting to continue their skills journey with us after volunteering, such as subsequent employment within the CAB network.

# How we are developing the benefits of volunteering

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## Social Policy Volunteering Roles

We are looking to develop a new area of volunteering to give people greater skills in areas such as communications and public relations. This will include empowering co-production opportunities as well as a focus on employability pathways and influencing strategic policy decisions.

These opportunities will boost volunteers' employability and capability to support those experiencing poverty. They will benefit communities by boosting skill levels and income. Nationally, they will make public services and local communities fairer and more just.

Our ambition is to achieve this through a co-design programme with people with lived experience and new technologies to develop a future proofed, sustainable volunteer framework. This framework will help us to meet demand from existing client groups and increase our ability to reach people from under-represented groups.

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## Increasing Volunteering Project

The Increasing Volunteering project provides training support to Scottish bureau to increase their overall volunteer resources. The project follows the CAS quality-assured training model, adapted for remote, Zoom-based delivery. This approach has delivered training for over half of our member Bureaux, with more expressing interest by the day. This removes distance barriers for individuals to engage in our volunteering opportunities.

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## Accreditation

We are currently working to get our general volunteering, generalist advising, social policy work and specialist MATRICs training accredited with SQA/SNQF standards.

This will seek to provide formal recognition of volunteering activity and associated workplace learning. Through participation in volunteering activities, candidates will develop a range of skills and personal development experiences which will help to prepare them for responsibility, further education and employment.



**“I looked into possible volunteering roles that I thought would be worthwhile and volunteering at a CAB was the best for me. It’s not easy but it’s a valuable service. It’s really satisfying helping people.”**

CAB volunteer

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# Volunteering as a tool for upskilling Scotland

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There has been consistent evidence to show that volunteering should be considered as a tool for developing skills and pathways to employment. Despite delivering outcomes for Scotland in getting people the skills needed to get into the world of work, the CAB network has never been utilised to its full potential.

We believe that in the context of the shift in Scotland's skills landscape to meta skills learning and a well-being economy, the voluntary sector should be recognised and resourced to continue to deliver a community-based learning environment that bests foster this specific kind of informal learning.

Learning new skills and experiences that helps volunteers excel in a career or find employment – this part has always been delivered without funding for their delivery.

Long-term proposals by Scotland's skills agencies are to maintain spending on meta-skills programmes and ensure all those who need to upskill or retrain can access these programmes. It would also seem appropriate that access to such funding is widened to the voluntary sector.

We believe we can deliver locally for communities while offering a national coverage and structure to the volunteering pathway and deliver the soft meta skills needed for the future of Scotland's well-being economy in volume as outlined as recognised by National Strategy for Economic Transformation (NSET).

Put simply, the CAB network propose that local variation and accountability are the solutions, rather than the blockages, to better and more cost-effective employability outcomes. They are a surer route to overcoming the inequalities that remain unacceptably prevalent in many parts of Scotland in terms of learning and skills development.

Therefore, rather than a homogeneous service design across the whole project, there should be a focus on relationship and trust building to make real and lasting differences in communities across Scotland from a range of different local volunteering opportunities. Crucially this works alongside a consistency of various centralised functions in a "once and well" approach around website, brand, recruitment and training services.

This would help achieve a key recommendation of the recent Withers report on reviewing the Scottish Skills landscape. Qualifications and awards that more deeply embed work-integrated learning and employability related skills development are needed. Given that the location for most people undertaking learning and training will be the workplace, there should be welcome recognition of the delivery of skills development of the voluntary sector through such routes.



**"I was new to the area and needed support from the local CAB. The manager asked if I would be interested in volunteering and I said yes! As a former lawyer, it is satisfying to give something back. I enjoy it very much."**

CAB volunteer

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