

User Research Playback #1

Training Fund Reimbursement Scheme

November 2023

Research aims

- Who are our users? In other words, who in the organisations are going to be the ones clicking 'Start Now'? Is it just one person, or multiple people?
- How do care providers go about providing, paying for and recording staff training? How does this differ in small independent care homes compared to very large ones?
- How do care providers manage payments for training? How does this differ between smaller and larger care providers, and what impact does this have on uptake? Can smaller care homes afford to pay for CPD training upfront? Could this (or anything else) prevent them from wanting to utilise these schemes?
- How actively are care staff involved in managing their own training and CPD? Do they seek out appropriate training and keep track of what it's all costing?

Research aims (continued)

- How does training provision and attendance vary according to staff type, i.e. full-time vs part-time care staff, Personal Assistants, admin or managerial staff?
- How do care providers establish that training has been completed? Do care providers tend to require proof of completion or attendance, and if so what does that proof look like?
- Have care provider administrators and carers heard about the training reimbursement scheme, and if so what are they expecting and/or hoping for? Where would they go to find out more?

What we did

- We spoke to 10 people as part of this first round of user research.
- 8 of these sessions were conducted over MS Teams. 2 sessions were face-to-face in a care home.
- The Teams calls were 45 minutes long and included a small introduction to the participant and their role, followed by questions on how they manage learning and development, who tends to do the data entry, experience of the WDF and ASC-WDS, how they record proof of completion and track all the training / qualifications held by their staff. (Discussion guide available [here](#).)
- Recordings and transcripts for all the Teams calls are available on [Sharepoint](#).

Recruitment

- Recruitment proved something of a challenge. Why? It's likely a combination of reasons, but mostly due to people working in ASC being very strapped for time and unfamiliar with our service.
- It's also not always that easy to pinpoint and make contact with the most appropriate person in an organisation.
- Amelia and James emailed over 400 care providers, although the response rate was very low.
- One participant was particularly useful and gave us the names of 4 people doing similar roles in other large organisations. We've spoken to 3 of those 4 people so far.

Key findings

- There are very different processes for managing L&D in medium-to-large and small organisations. Medium and large organisations tend to have a central L&D team that manages and procures training.
- Backfilling, and course costs, are arguably the greatest barriers to training.
- Having to maintain up-to-date information on the ASC-WDS is seen as burdensome, but a price worth paying for the larger organisations in order to be eligible for the WDF. But it's possible that this administrative burden is too big for smaller organisations.
- Every organisation has some systematic way of tracking staff training, even if it's on a simple spreadsheet.

Different experience for big vs small organisations

For smaller companies cash flow may be an issue. It can be a while before costs are reimbursed - and there exists a risk that they never do - so they need to be able to pay the invoices before being reimbursed, and potentially prepared not to be reimbursed at all. For larger companies this is less of an issue - the WDF makes up a small percentage of their training budget.

HR systems make life a lot easier but can be very expensive – even some larger organisations don't have one for this reason. At what size does this become affordable? We're still not sure. We spoke to at least one large organisation that still didn't have a "proper" HR system in place, although they were in the process of transitioning to one.

How Might We... ensure that the service works for all organisation sizes, including those without the advantage of a centralised L&D team?

Different experience for big vs small organisations (continued)

The larger the organisation, the more of the training is done in-house, with only very specialist training procured from external providers. They still, however, are eligible for WDF funding.

One of the larger organisations we spoke to ring-fenced WDF money for apprenticeships.

"A lot of people come and join us, pure and simple, for the training, because again, I think we're, as you probably would have got from from [P2], is that we're quite known in the sector for being the leader in terms of our workforce development." P3

"We have a full suite of delivery. So we have subject matter experts across the business, but we actually develop and adapt our own learning and development opportunities." P8

Centralised L&D teams

4 of the 5 people we spoke to have some kind of central team who help oversee L&D within the organisation.

There are real advantages to this model, as it allows service managers to focus on their core tasks and not get caught up in the administrative burden of procuring training. There's a lot of work involved in procuring high quality training.

One question that remains: at what size does an organisation decide to centralise its L&D responsibilities?

How Might We... ensure that members of centralised L&D/admin teams are able to collaborate on building and submitting claims?

Backfilling as a major barrier to training

Backfilling - one person we spoke to told us of how his organisation had been offered “free” training. They pointed out that it wasn’t really free, as they would need to backfill those roles.

With backfilling, the level of burden is dependent in part on the type of service being provided. If it’s a service where there’s one person providing care to a number of people, the position must be backfilled in order to care for those clients. In other settings / services, there might be 10 people, and that team could cope with one less member for a shift.

Typically, the larger the organisation the greater their capacity to backfill roles.

"It's quite difficult sometimes because it's not, you can't just take two days off, you can't have a whole division say right, 'we're doing training now', because you know things have to be achieved each day." P4

"I get infuriated, our local ICS is always offering me free training and I'm like, well, it's not free though, is it? There may not be a cost for the actual training class, but you're not paying me for our staff time or the backfill time." P5

Picking the right courses and providers

There are a lot of training providers out there, and it's not always clear which are good and which are bad. This is another advantage of the centralised L&D model – that team can do work to source high quality providers.

Knowing which courses are eligible can also be tricky. Leeds County Council provide a list of eligible courses.

"I would much rather [centralise training] and know that I'm training people in the right way to earn an accredited standard than the lottery that you have with training providers, of which there are thousands, where you don't really know whether you're getting good quality or not." P5

"Something else I hear a lot of from the higher quality providers is, they are very keen wherever possible on face-to-face training. Some things can be eLearning, of course they can, but there are some things that they very strongly believe are better done face-to-face. The challenge that comes to them with face-to-face learning is it's always more expensive for obvious reasons." P9

Tracking training

A lot of training is tracked through a LMS. Often this is “the certificate”.

If it's not an LMS it's an Excel spreadsheet, often RAG-rated to make it clear which training has been completed, which qualifications are set to expire etc.

Often service managers are sent weekly or monthly reports, providing a summary of which staff members need to complete training. They often work to targets, i.e. 90% of staff need to have completed their mandatory training.

"I make sure that the certificates are in first. So when we have an audit, we've got all that evidence to be able to provide to the WDF." P2

"We can do reports based on areas, we can do reports based on a home, there'll be varied different hierarchy levels within that system as well. So we can pull a whole range of reports out there and for that individual exactly we can see and it will also predict when somebody is due to repeat training." P8

"I can tell you what Simon needs to do in his training, I can flick Simon's profile up and I can tell you what he would need to do." P2

Administrative burden and struggles

Course codes changing was an issue for one - something we may want to investigate further. It was also difficult to find the new, correct course code.

For those who don't claim the WDF, administrative burden seems to be the primary reason. It requires data to be uploaded to the ASC-WDS. Typically this seems to be an organisation's main reason for uploading to the ASC-WDS, i.e. without the WDF they likely wouldn't bother.

However, we might still benefit from speaking to more organisations that haven't been claiming WDF to understand why.

"Some other things are a formal proper qualification, so we may be claiming some of those things 12 months down the line. And of course that becomes a bit of an issue if we have got people that are doing qualifications that run from one financial year to another." P3

"We have a process in place and we're quite lucky actually because our provider provides pretty much all the information we need. [...] So it's a simple process of obtaining the data from our training providers." P8

"So if [the ASC-WDS] wasn't a requirement, I'll be honest, I probably wouldn't do it purely based on the value of the data, because I don't think the data would be that accurate." P6

"It's all automated now because there is a script that's been developed that pulls all that data together from various different systems across [our organisation] and we're able to bulk upload that onto the Adult Social Care Workforce Data Set. So it's a lot smoother now. It was a very, very, very painful process, many years ago. I think it's a real struggle if you don't have that expertise within an organisation [...] to automate things." P8

General observations about the sector

- Adult Social Care is not just caring for the elderly - a source of frustration for some who work in ASC caring for those with learning disabilities and other challenging conditions.
- Support workers vs care workers - are we confident in the differences in terms of how it impacts our service? Does this impact eligibility at all?
- There's mandatory training, and training that's seen as mandatory by the organisation in order to provide high-quality care. For example, epilepsy training for people working with epileptics, autism training for people working with autistic clients.
- Not all front-line staff have a company email address.

"What's complex about health and social care is the different funding streams. That's the thing - when you're talking about this, you could talk to ten different people with ten very different experiences because funding streams are split in so many bizarre ways through the country." P4

General observations about the sector (continued)

There's a business incentive to make sure the individual enrolling on training is a) likely to complete it / do well and b) benefit the company with this newly-acquired knowledge. It's not as simple as an employee saying they want to do a particular piece of training and automatically being signed up. Sometimes staff need to go through something resembling a job interview to be allowed to do a course, particularly a more demanding and/or expensive one.

A lot of training is now online, although we've heard about a lot of front-line staff who really struggle with technology, even younger staff. Even staff who are relatively comfortable using WhatsApp, Instagram etc.

"We make copious amounts of profits every year, we can't make those for our investors if we don't tap into every opportunity that we can to get support." P2

"There is a cost involved and it can be quite a lot if people drop out of things [...] I don't think staff understand just how expensive training is. I don't think they do." P5

Thank you!