Joining Money Guiders

Take your help further





If you ever have money conversations with your customers, our free programme will help you to help others.

Money Guiders provides ongoing professional development to organisations and practitioners who have money conversations with customers in need.

Develop skills.
Share knowledge.
Improve lives.







What is money guidance?

Money guidance is any non-regulated money conversation you have with customers. It ranges from pointing someone elsewhere for help (signposting) to giving complex, technical information.

Guidance provides impartial information on the available options, which may include the pros and cons.

But guidance **does not** recommend one option over another. Financial advice does, however, and is regulated.

Guidance will suggest what you *could* do.

Advice will recommend what you **should** do.

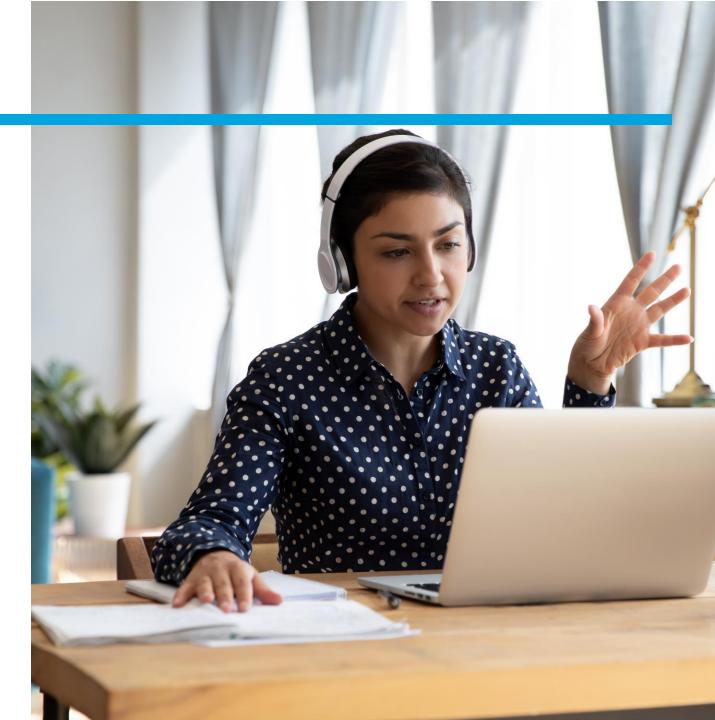
For a fuller definition, go to:
https://maps.org.uk/money-guiders/understanding-the-difference-between-advice-and-guidance/



Who are Money Guiders?

Around 3.7 million practitioners give some form of money guidance in the UK. Together, they reach millions of people in need. They are:

- Busy employees and volunteers with all types of job titles.
- Working across sectors to help struggling and vulnerable customers daily.
- They include employees and volunteers who work within community, charity, health, mental health and social services; social housing, welfare and police officers; student support teams; energy advisers; money mentors; and foodbank volunteers.
- The people these organisations and practitioners support are likely to be seeking help due to a significant life event, may be vulnerable or have complex needs. It's important they receive good quality money guidance regardless of where they access it.



Programme credentials





Government backed



Proven to work



Take your help further



Working with partners and in networks across England, Wales, Scotland and Northern Ireland



City & Guilds recognition

Money Guidance Foundation Course and Tier 1 Technical Domains

Take your help further

Home About Us ✓ My Learning

Start with the Money Guidance Competency Framework: The

framework sets out the core competencies needed to provide a safe quality service and is designed for anyone who provides any type of money guidance whatever their sector or role













Ways to use the Competency Framework

Practical ways to put the Framework into action

Choose what works best for you

Taking the Framework further

Whether you're a frontline worker, a team leader or service manager, the Framework will support your practice in other ways too.





For more on how to use the framework, go to: www.moneyandpensionsservice.org.uk/money-guiders/ways-to-use-the-framework/

To use the confidence checker, go to: Confidence checker | Money and Pensions Service (maps.org.uk)



Money Guidance Competency Framework

Foundations Types Personal qualities and attributes Foundation - Skills and behaviours These are the behaviours and Transferable skills personal characteristics that practitioners need. Money guidance Self-management practitioners need all the foundation Foundation - Knowledge and The boundaries of the service and of your role attributes. compliance These are the underpinning E. Signposting customers knowledge of the boundaries of the Compliance and safeguarding role and the regulations that apply. **Technical Domains**

Each of the 12 technical domains is tiered, according to level of complexity. Not all domains require content at all 3 tiers.

Money Guidance practitioners can self-identify at a particular domain and tier - completely dependent on the depth and breadth of service offered.

			Tier 1	Tier 2	Tier 3
I	1.	Knowing your customer			
	2.	Debt			
	3.	Borrowing			
	4.	Welfare and benefits			
	5.	Budgeting and cashflow			
	6.	Savings			
	7.	Investments			
	8.	Taxation			
	9.	Insurance			
	10.	Households			
	11.	Pensions			
	12.	Planning for later life			

- Know the core skills, qualities and knowledge needed to give good money guidance, and a safe, quality service for customers.
- Our Framework is designed for anyone who provides any type of money guidance whatever their sector or job role.
- All training is based on this Framework.

Click these links to 3 short videos explaining how the Framework is structured and how it can be put into action.

<u>Competency Framework – An Overview</u>

<u>Competency Framework – The Structure</u>

<u>Competency Framework – How To Use It</u>



City & Guilds endorsed credentials: Foundation modules and Tier 1 Technical Domains







- City & Guilds endorsed credentials available for the Money Guidance Foundation Course and for Money Guidance Tier 1 Technical Domains
- Criteria: completion of the Foundation modules and the Foundation assessment.
- Criteria: completion of Foundation assessment to undertake assessment for Tier 1 technical domains
- The endorsed credential come in the form of digital 'badge's' that you can share
 on social and professional online platforms, such as LinkedIn and
 Facebook, and add to your email footer and digital copies of your CV.
- We are not able to provide exemptions for prior learning or other qualifications you may hold.

More digital credentials are planned for the Technical Domains at Tiers 2 and 3.



Community Networks

- There's a community network in each of the four UK nations –
 you can connect with others working in similar roles
- Programme partner practitioners are network members by default – we'll add you to your home area network list and you'll receive newsletters
- Hear from specialist speakers and policy experts through a programme of 100+ free online events every year, with additional in-person learning opportunities
- Access to an online community, resource library and discussion forum

100+ Events per year

7500+ Network Members

3000+ Social Network Community

Annual Online Conference



England Network delivered by **Quaker Social Action**



Wales Network delivered by MaPS - Money Guiders



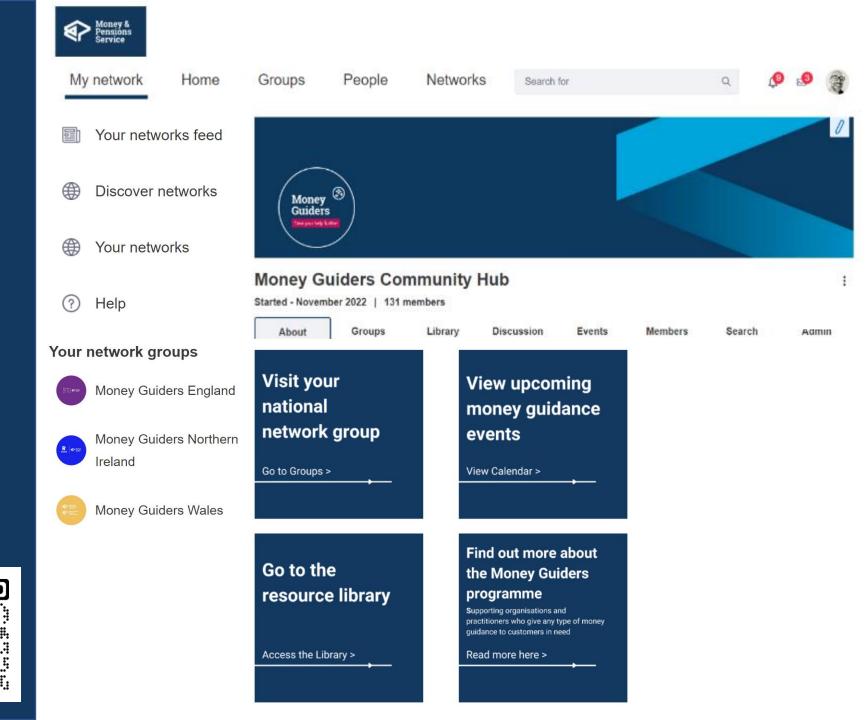
Scotland Network delivered by Improvement Service



Northern Ireland Network delivered by Reed In Partnership

The Money Guiders Community Hub

Money Guiders now has its own online network - a space to share knowledge and expertise, and an opportunity to join a growing community of money guidance practitioners



What partners and practitioners are saying about Money Guiders



"I think I'm just more confident, I know what my boundaries are now ... before I might have just signposted somewhere else, but now I'm more confident I'm saying the right thing and I'm giving out the right kind of information."

"The whole programme fits in with our aim to encourage more frontline staff to have conversations around money with tenants. Previously they probably didn't see that as their role."

"We've joined one of the forums, and that was absolutely brilliant ... possibly the best thing we'll get out of the programme is the network of people to talk through and discuss cases."