



Making the best use of  
the apprenticeship levy

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Professional  
Development

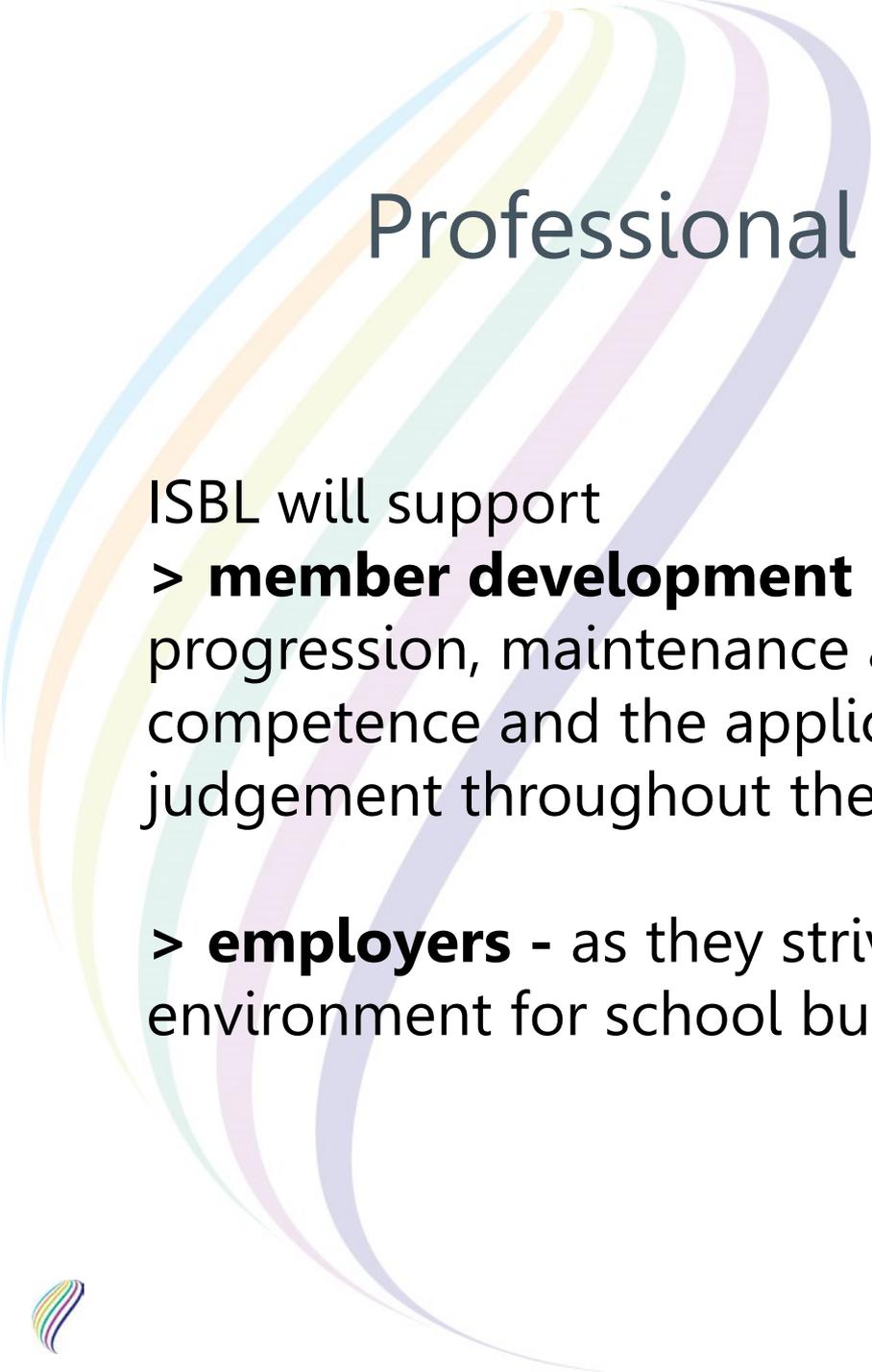
ISBL

# Introducing ISBL

## ISBL role

- Raise the **profile** of school business professionals
- Promote the **value and impact** of the profession
- Bring about **peer parity** with other occupations
- Provide access to **training & development** opportunities
- Encourage **networking**
- Enable **participation** in the development of the sector





# ISBL Professional Development Vision

ISBL will support

- > **member development** - encouraging the progression, maintenance and enhancement of skills, competence and the application of professional judgement throughout their career
- > **employers** - as they strive to provide a learning environment for school business leaders



# Defining the Profession

- ISBL's energy = **focused on professionalisation** and the continuous improvement of practice
- A **profession** is defined as *"the development of formal qualifications based upon education, apprenticeship, and examinations, the emergence of regulatory bodies with powers to admit and discipline members, and some degree of monopoly rights.."*

Source: <https://en.wikipedia.org/wiki/Profession>



# The Importance of Professional Development

- To possess **up-to-date** knowledge & skills
- To gain a competitive advantage and stay at the top of your profession with a **career plan**
- To **record** your career plan & CPD in a systematic way will help to maintain competence and capability



# Planning your Professional Development

## **SBPs route into the profession varies**

- Some find themselves in the sector by chance rather than by design
- Some enter the sector with professional qualifications and professionally registered
- Some join the school in administrative positions & progress to roles with authority & responsibility.

## **ISBL suggests that you -**

- Track your progress & note your success
- Use job adverts, job descriptions and professional standards as a benchmark to identify your development needs.



# The benefits of planning your Professional Development

Planning & completing your professional development will provide a number of benefits -

- **Peer parity** with other professionals in the workplace
- Keeping **up-to-date** with technology, legislation & workplace requirements
- Enhancing your future **employability**
- Demonstration of your **commitment** to the profession
- Becoming a **role model** for others
- Providing **personal satisfaction** that your career has structure and value



# Apprenticeships Opportunities

Apprenticeships in schools offer opportunity for -

- **Aspiring & practising** SBPs
- Combine practical **training & study**
- Route to ISBL **Membership**
- Professional and personal **development**

ISBL has advised on the development of a number of new apprentice programmes that have been specially contextualised for the education sector



# The key competences for effective school business management

ISBL defines '**competence**' as -

- *The ability to apply knowledge skills and understanding in order to carry out a task: effectively, consistently and safely to a defined standard*

## **Apprenticeship Standard**

@ Skills, knowledge & behaviour

ISBL Professional Standards

- Establishes a clear **blueprint** for effective school business management & leadership
- Celebrates existing best practice.



# Supporting Professionalisation

## Supporting your development

### **ISBL Professional Standards**

- 2015 - NASBM priority = development of a suite of professional standards for SBP, comparable to those already available for **other staff** in schools
- In a **changing workplace**, these standards = effective benchmark for the development of the profession
- Underpin the **SBP & CMDA apprenticeships** ISBL has been involved with



# Supporting Professionalisation

## Supporting your development

ISBL's Professional Standards:

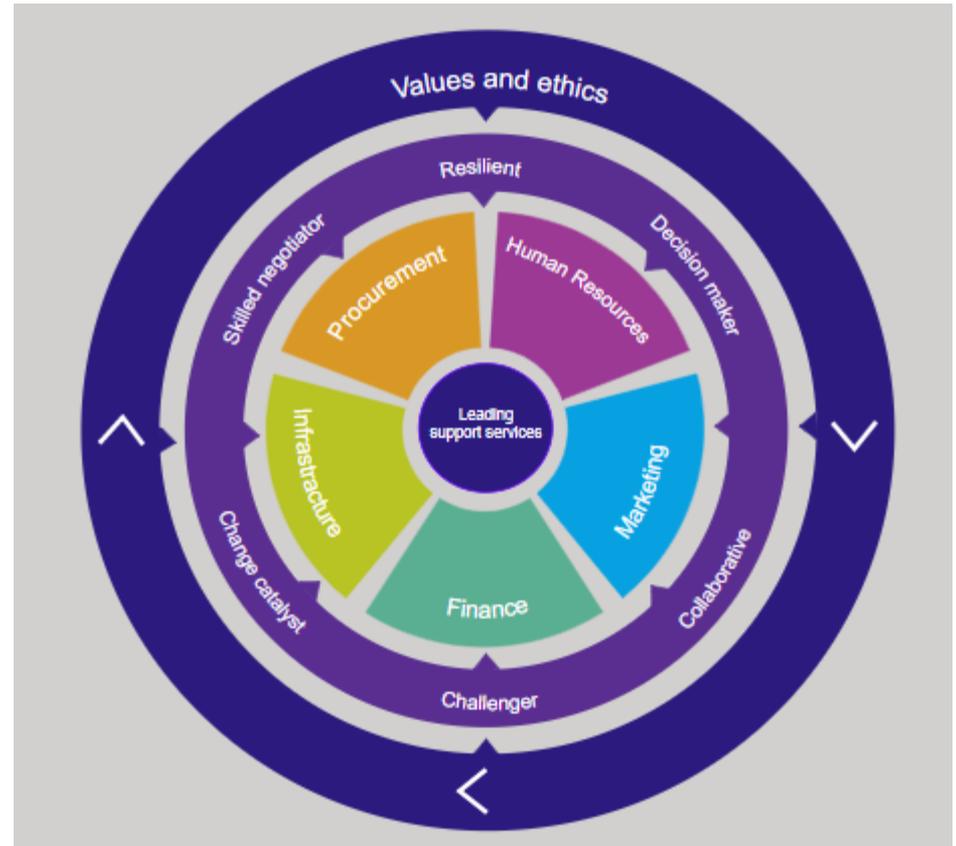
- Set out the **core and specialist areas** of competence required to be successful
- Assist those currently working in, or **aspiring** to work in the profession, to perform their role
- Set out the content of both **initial and continuing professional development** for those entering or developing their career
- Provide a **framework** for the development of qualifications and other professional recognition



# ISBL Professional Standards

- 6 main **disciplines** of school business management
- 6 principal **behaviours** required to be effective

Each wheel allows users to drill down into each section & self assess their own development against a defined standard



# ISBL Professional Standards

Tier 1	Tier 2	Tier 3	Tier 4
Practice at this level is likely to include, but not be limited to, making contributions to a process or a project with some direct responsibility for an area of work or an element of a team.	Practice at this level is likely to include, but not be limited to, supervision of a team, a process or a project with supervisory responsibilities for an individual or a team discharging a task or function.	Practice at this level is likely to include, but not be limited to, the management of a team, processes or projects with management accountability for an individual or a team discharging a task or function.	Practice at this level is likely to include, but not be limited to, high levels of accountability for strategic leadership and/or specialist knowledge (mastery) across defined areas of the school/trust, and a commitment to a self-improving sector through system leadership.
Knowledge at this level focuses on the immediate skills and understanding needed to perform defined tasks.	Knowledge at this level facilitates operational competency across a number of interrelated tasks and professional disciplines.	Knowledge at this level results in strong technical competency across a number of interrelated tasks and professional disciplines.	Knowledge at this level represents technical mastery of specific professional discipline(s) and the ability to pass on that mastery to others.
Basic understanding of the context/purpose of tasks undertaken.	Broad understanding of the context/purpose of tasks undertaken.	Firm understanding of the strengths of the school/trust.	Profound understanding of the wider context in which the school/trust operates.



# Background

## **Apprenticeship levy**

- April 2017 all UK employers in the public and private sector with a wage bill of over £3 million have been paying levy
- Apprenticeship levy = 0.5% of annual salary bill

## **The Government**

- Estimated that this will affect > 2% of UK employers
- Wants to expand existing, or introduce new, apprenticeship programmes
- 2015 election promise = delivering 3 million apprenticeship starts by 2020.



# DfE guidance for schools

## **DfE guidance for schools**

<https://www.gov.uk/government/publications/apprenticeships-reforms-guide-for-schools>

Due to be updated July 2018

The new version will include FAQs & apprenticeship standards available for schools.

## **Post Graduate Teaching apprenticeship**

<https://www.gov.uk/guidance/postgraduate-teaching-apprenticeships-guidance-for-providers>

## **National Apprenticeship Service (NAS) GOV.UK**

<https://www.gov.uk/apply-apprenticeship>



# The benefits of developing the apprentice community

**Research** on employers who have an apprenticeship programmes -

- Workplace productivity had improved by 76%
- 75% reported that apprenticeships improved the quality of their product or service
- Other benefits included:
  - increasing employee satisfaction
  - reducing staff turnover
  - reducing recruitment costs

- [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/676455/Employer\\_guide\\_to\\_apprenticeships\\_03.11.2017.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/676455/Employer_guide_to_apprenticeships_03.11.2017.pdf)



# Supporting your development Apprenticeships

Apprentices are encouraged to become ISBL Members and enjoy the benefits that Membership will provide

- Support in career development
- Challenge from networks both face to face and online
- **Level 3 Business Administrator** – available
- **Level 4 School Business Professional** – available autumn 2018
- **Level 6 Chartered Manager Degree Apprenticeship (CMDA)** – available now
- **Level 7 Senior Leadership** – available autumn 2018



# Getting started

## Step One

- Understand if your organisation will be eligible to pay the levy
- On line process driven from Go.uk website
- <https://estimate-my-apprenticeship-funding.sfa.bis.gov.uk>

## Estimate my apprenticeship funding

Use this tool to estimate if your organisation will pay the apprenticeship levy, how much your organisation will have available to spend on apprenticeships and how much the government will contribute towards the cost of training.

You'll need to know your organisation's annual UK payroll.

▶ [What is my payroll?](#)

**Start** >

It would also help if you know:

- the percentage of your pay bill that goes to employees living in England
- the type of apprenticeship training you will need



# Getting started

## Step Two

- Undertake a skills analysis in your organisation
- Decide what kind of apprentice you need in your organisation
- Use ISBL Professional Standards as a reference
- Research how SQEP reviews are undertaken in industry
- <https://findapprenticeshiptraining.sfa.bis.gov.uk/>

### Find apprenticeship training

**BETA** This is a new service – your [feedback](#) will help us to improve it.

### Find apprenticeship training

For employers looking to take on apprentices.

Use this service to:

- search for apprenticeship training by job role or keyword
- find training providers who offer the apprenticeship training you choose
- find a named training provider you want to use

**Start** >



# Professional pathways

## Variety of -

- Development needs
- Pathways to Executive roles
- Route taken to join the profession
- Past knowledge, skills and qualifications

ISBL advises that a formal professional development planning tool is used to facilitate career development discussions

## Mature system career pathways



# Getting started

## Step Three

- Think about your organisation's readiness
- Does the line manager know the commitment expected of them to support the apprentice's development?
- Do you need to develop a mentoring programme for apprentices?
- Do you know where apprenticeships can be progression routes to future jobs in the organisation?
- Develop clear pathways so your apprentices can progress on to higher learning opportunities & careers.

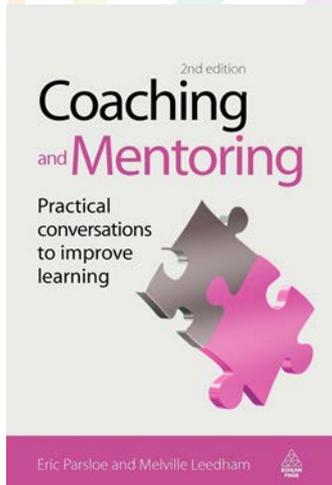


# Defining Mentoring

*"Mentoring is to support and encourage people to manage their own learning in order that they may maximise their potential, develop their skills, improve their performance and become the person they want to be."*

**Eric Parsloe,**

**The Oxford School of Coaching & Mentoring**



# Activity

## **The Levy : Use it or Loose it!**

- Employers must prepare for how to best use the levy
- Effective use of apprentice programmes can bring maximum benefit to the school

## **Group activity**

- In small groups – discuss how your organisation has used/plan to use the levy
- What has gone well?
- What have been the challenges?
- What would you do differently?
- Feedback to wider group



# Getting Started

## Step Four

- Identify the cost of your chosen apprenticeship
- Online resources outline all programmes costs
- <https://www.gov.uk/government/publications/apprenticeship-funding-bands>



Education & Skills  
Funding Agency

### List of apprenticeship standards approved for delivery for starts from May 2017

The following list includes all currently available standards available for delivery and their funding band.

Please note it may take up to two weeks for newly approved apprenticeship standards to appear on the Learning Aim Reference Service (LARS).  
Please refer to the [Data Collection Maintenance Schedule 2017 to 2018](#) for further information on LARS publication dates.

Sector	Apprenticeship standard	Level	Published	LARS code for providers only	Funding Band	Funding band maximum
Accounting	<a href="#">Professional Accounting Taxation Technician</a>	4	21-Jul-16	117	9	£9,000
Accounting	<a href="#">Assistant Accountant</a>	3	07-Sep-16	133	9	£9,000
Accounting	<a href="#">Accountancy Taxation Professional</a>	7	07-Nov-17	204	13	£21,000
Actuarial	<a href="#">Actuarial Technician</a>	4	26-Mar-15	17	11	£15,000
Actuarial	<a href="#">Actuary</a>	7	27-Mar-18	255	12	£18,000
Administration	<a href="#">HR Support</a>	3	25-Aug-17	191	7	£5,000
Administration	<a href="#">Business Administrator</a>	3	18-Sep-17	196	7	£5,000
Administration	<a href="#">Recruitment Consultant</a>	3	20-Dec-17	217	7	£5,000
Administration	<a href="#">Recruitment Resourcer</a>	2	20-Dec-17	218	7	£5,000



# Getting Started – Identify a training provider

## Step Five

- Identify **Institute for Apprenticeships (IfA)** approved training providers, via their website
- Contact the LA/Academy Procurement team, or Children's & Education Services/ Education Dept
- Some LAs will have a specific Apprenticeship Manager or Apprenticeship Funding Manager who can offer specific advice on available providers and local funding



# Getting started – Identify a training provider

## **For LA Maintained schools**

- Identify what the LA procurement process is for providers – they may only be able to apply to the provider(s) who are approved and registered on their local provider framework
- If no provider is currently nominated by LA, ascertain if the LA would be happy to approach the provider to start the tendering process



# Getting Started – using on line resources

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**Start** >

## Find apprenticeship training

**BETA** This is a new service – your [feedback](#) will help us to improve it.

## Find apprenticeship training

Search by apprenticeships or named training provider

- apprenticeships
- the name of a training provider you already know

**Continue**

## Find apprenticeship training

**BETA** This is a new service – your [feedback](#) will help us to improve it.

## Search results

There are **69** apprenticeships matching your search for 'school business professional'.  
Results labelled **New** are apprenticeship standards developed by employer groups.

Showing search results for:

school business professional **Search**

Filter results

Sort by **Best match** ▼

Apprenticeship level

- level 2 (15)
- level 3 (25)
- level 4 (16)
- level 5 (6)
- level 6 (6)
- level 7 (1)

[▶ Explain levels](#)

**Update results**

[School Business Professional](#) **New**

**Level:** 4 (equivalent to certificate of higher education)  
**Typical length:** 18 months

[Business and Professional Administration](#)

**Level:** 4 (equivalent to certificate of higher education)  
**Typical length:** 24 months

[Supporting Teaching and Learning in Physical Education and School Sport](#)

**Level:** 3 (equivalent to A levels at grades A to E)  
**Typical length:** 12 months

# Getting Started

**School employers** should

- Speak to a **range of approved learning providers** to find a relevant apprenticeship.
- **Shop around** seek clarity on issues such as quality, apprenticeship framework/standard
- **Assess** apprenticeship packages that different providers are offering.
- Undertake a **Training Needs Analysis (TNA)**
- Talk with your union or Professional body – they may have relationships with other stakeholders such as Sector Skills Councils who could help



# The Systematic Approach to Training

- ISBL recommends the use of the **systematic approach** to training
- Common tool deployed across industry, supporting the delivery of appropriate training and evaluating the impact

Demonstrating the impact of training; making a difference to the sector

Identifying the training need

Demonstrate that the programmes & apprenticeships meet market & member expectations  
Validating the content prior to launch

Evaluation

Plan and design the training

Implementation

SAT will drive the management and maintenance of training programmes

A consistent process will ensure peer-reviewed quality, content and delivery



# Training Needs Analysis

- Training should be seen as an **investment, not a cost**
- Apprenticeships should be seen as an activities that will enhance the **competence of the organisation**
- Is it good **use of the levy?**
- What is a useful **work based project** for the apprentice to do?
- What happens after the apprenticeship?
- What is the **follow up** activity?



# Employing an Apprentice

## Step Six

- **Apprentice agreement** = vital
- For all apprentices, not just new starters
- **Line manager** role = oversee & manage - may be more involved than a conventional self study programme
- **Mentor** could be an experienced practitioner within the school

- <https://www.gov.uk/take-on-an-apprentice/apprenticeship-agreement>

## Make an apprenticeship agreement

You must sign an apprenticeship agreement with your apprentice.

This gives details of what you agree to do for the apprentice, including:

- how long you'll employ them for
- the training you'll give them
- their working conditions
- the qualifications they are working towards

You can write your own apprentice agreement or download an [apprenticeship agreement template](#).



# The use and deployment of levy funds

## What can levy funds pay for?

- Funds in the **Digital Account** can pay for apprenticeship training and assessment (with an IfA approved provider and assessment organisation, up to its funding band maximum)
- *These funds cannot pay for wages, travel or subsidiary costs, managerial costs, work placements, traineeships, or the costs of setting up an apprenticeship programme.*
- Employers can use Digital Account funds to progress current employees into a higher level apprenticeship, or where this teaches a new set of skills.



# Watch your timings

- If you don't spend the funds in your digital employer account within those **24 months** they will expire.
- The funds decline (and accumulate) on a monthly basis, so if you don't spend the funds you accumulated in month one, you will lose those funds in month 25.



# What if you've spent your levy allocation and need more?

- Our discussions with providers seem to indicate that you should continue to submit your documentation for additional apprentices / apprenticeships to your LA/trust
- ESFA will recognise your change in circumstances
- You should then be processed as a "non-levy payer" and will be requested to contribute 10% to the cost of the programme



# What happens if you change the status of your school?

- If you are already drawing down funding - contact the ESFA and training provider to discuss this
- If you need to register as a levy payer, do so once the change in status has been confirmed and you have the supporting documentation to provide an audit trail for the change.
- The system may lag, so engagement with ESFA is important



# Supporting the development of the sector

- ISBL is committed to the development of the profession and the people within it
- There are a variety of learning and development opportunities available to you to access at locations across the country
- [training@isbl.org.uk](mailto:training@isbl.org.uk)





Thank you