

Advanced Manufacturing and Engineering
Trailblazer Employer briefing

WELCOME

Andrew Parsons Toyota Manufacturing UK

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Mapping Alignment Design principles in AME

Principle	Agreed with Minister	Automotive	Aerospace	Airworthiness	Maritime Defence	AME
Grading	2014	No change	No change	No change	No change	No change
Foundation & Development Phases, including gateway assessment	2014	No change	No change	No change	No change	No change
Principle of Continuous Assessment	2014	No change	No change	No change	No change	No change
Qualifications (with APL process and exemptions process)	2014	No change	No change	No change	No change	No change
Alignment with UK-SPEC (Meeting the requirements of UK SPEC as defined by employers)	2014	No change	No change	No change	No change	No change
Employer sign off of occupational competence	2015	No change	No change	No change	No change	No change
Assessment Plan Model & End Point Assessment	2015	No change	No change	No change	No change	No change
Battersea Model	2016	In agreement	In agreement	In agreement	In agreement	In agreement

2. Update on the latest developments on the Levy

Helen Gorner – Skills Funding Agency



Apprenticeship funding and apprenticeship service

Helen Gerner
Skills Funding Agency

Brought to you by
National
Apprenticeship
Service

Bigger and better programme

Ambitious Government reforms:

- Replace apprenticeship frameworks by 2020
- New Institute for Apprenticeships
- Legal protection to degrees
- Apprenticeship target for public sector bodies
- Secondary Class 1 NICs abolished



Underpinned by apprenticeship levy and apprenticeship service

What is the apprenticeship levy and who pays it?

Starts on **6 April 2017**, at a rate of **0.5% of pay bill**, paid through PAYE

Applies to all **UK employers** in all sectors

£15,000 allowance is **not a cash payment**

Only **1.3% of employers** will pay the levy

The levy will be set at **0.5% of an employer's pay bill**. It will only be paid on any pay bill in excess of

£3m

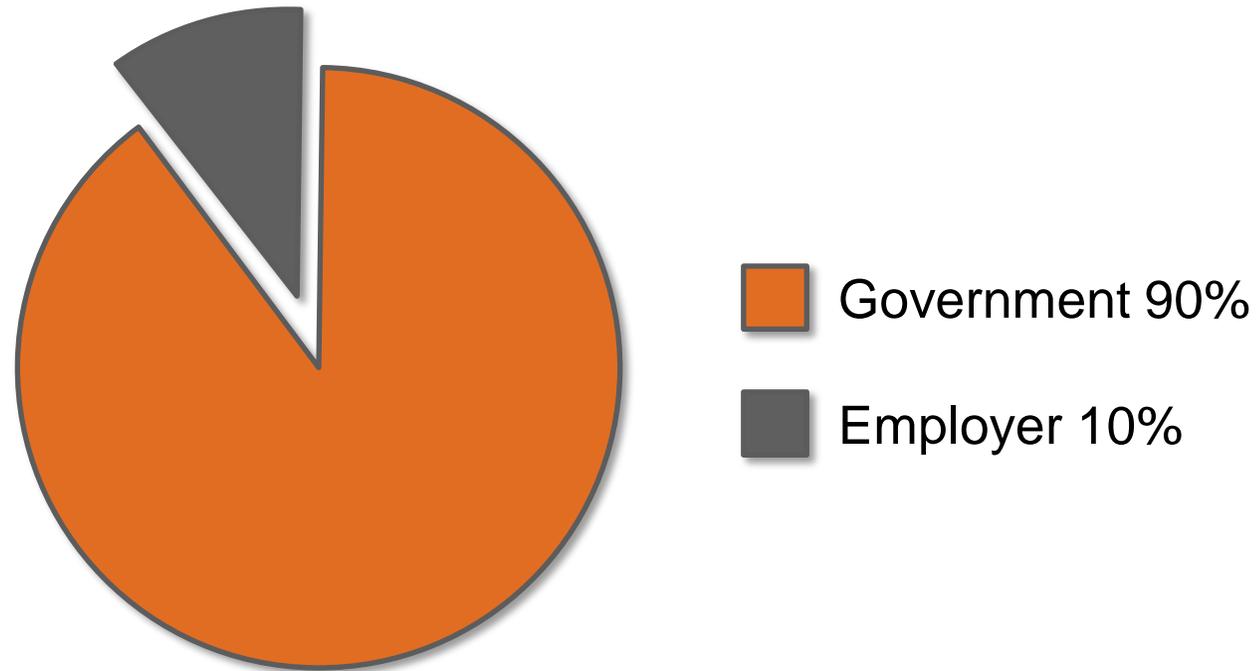
Employers will have an allowance of **£15,000** to offset against their levy payment



Co-investment

Two types of employers:

1. Employers who haven't paid the levy
2. A levy-paying employer with insufficient funds



Purchasing training

Apprenticeships started before 1 May will be funded through to completion according to the existing rules

New funding system comes into effect on 1 May 2017

- The cost will be spread over the lifetime of the apprenticeship
- We will hold back 20% of the total cost, to be paid on completion

Levied employers buying training from May 2017

- Can commit to apprenticeship starts from the beginning of May
- Funds will automatically leave the digital account on a monthly basis

Non-levied employers buying training from May 2017

- Continue to make payments direct to providers
- Move onto the digital system at a later date

What can funds be used for?

Government funding **can** be used for:

- apprenticeship training and assessment
- against an approved framework or standard
- with an approved training provider and assessment organisation
- up to the funding band maximum for that apprenticeship

Government funding **can not** be used for

- apprentice wages
- travel and subsistence costs
- managerial costs
- traineeships
- work placement programmes
- the costs of setting up an apprenticeship programme
- recruitment costs

Funding bands

Number	Band limit
1	£1,500
2	£2,000
3	£2,500
4	£3,000
5	£3,500
6	£4,000
7	£5,000
8	£6,000
9	£9,000
10	£12,000
11	£15,000
12	£18,000
13	£21,000
14	£24,000
15	£27,000

Every apprenticeship will be placed in a funding band

The upper limit of each funding band will cap the maximum:

- amount of digital funds an employer who pays the levy can use towards an individual apprenticeship
- that government will 'co-invest' towards, where an employer does not pay the levy or has insufficient digital funds

Employers can negotiate the best price for the training they require

- Employers are free to spend more than the funding limit
- Funding bands do not have a lower limit

End point assessment

- Cost included within negotiated price with training provider
- Select end-point assessment organisation from register of apprentice assessment organisations (RoAAO)
- Training provider will contract on your behalf, including agreements for:
 - end-point assessment
 - any retakes
 - payments
- Not usually be more than 20% of the total agreed price
- More information in the employer funding rules

Additional support

Disadvantaged young people

£1,000 to employers, and a further **£1,000 to training providers** if they train 19-24 year olds leaving care or who have a Local Authority Education and Healthcare plan

Funding for 16-18 year olds

£1,000 to employers, and a further **£1,000 to training providers** if they train a 16-18 year old apprentice

Small Employers

Employers with fewer than 50 employees will have 100% of the training and assessment costs covered when training a 16-18 year old (or 19-24 year old formerly in care or has a LA Education, Health and Care plan)

Support for training providers

Funding for additional learning support and English and Maths training

Funding rules

Transferring funding

During 2018 we will introduce means for employers to **transfer up to 10% of the levy funds** to another employer with a digital account, or to an ATA

Employers to support this by setting up a transfers working group.

Funding rules

Prior qualifications

Train **any individual** to undertake an apprenticeship at a higher level than a qualification they already hold

From May 2017, an individual can be funded to undertake an apprenticeship at the **same or lower** level to acquire **substantive new skills**

Funding rules

Cross-border funding

Applying a single test through the English system: based on **whether the apprentice's main place of employment is England.**

'Workplace' is where the apprentice is expected to spend the majority of their time during their apprenticeship.

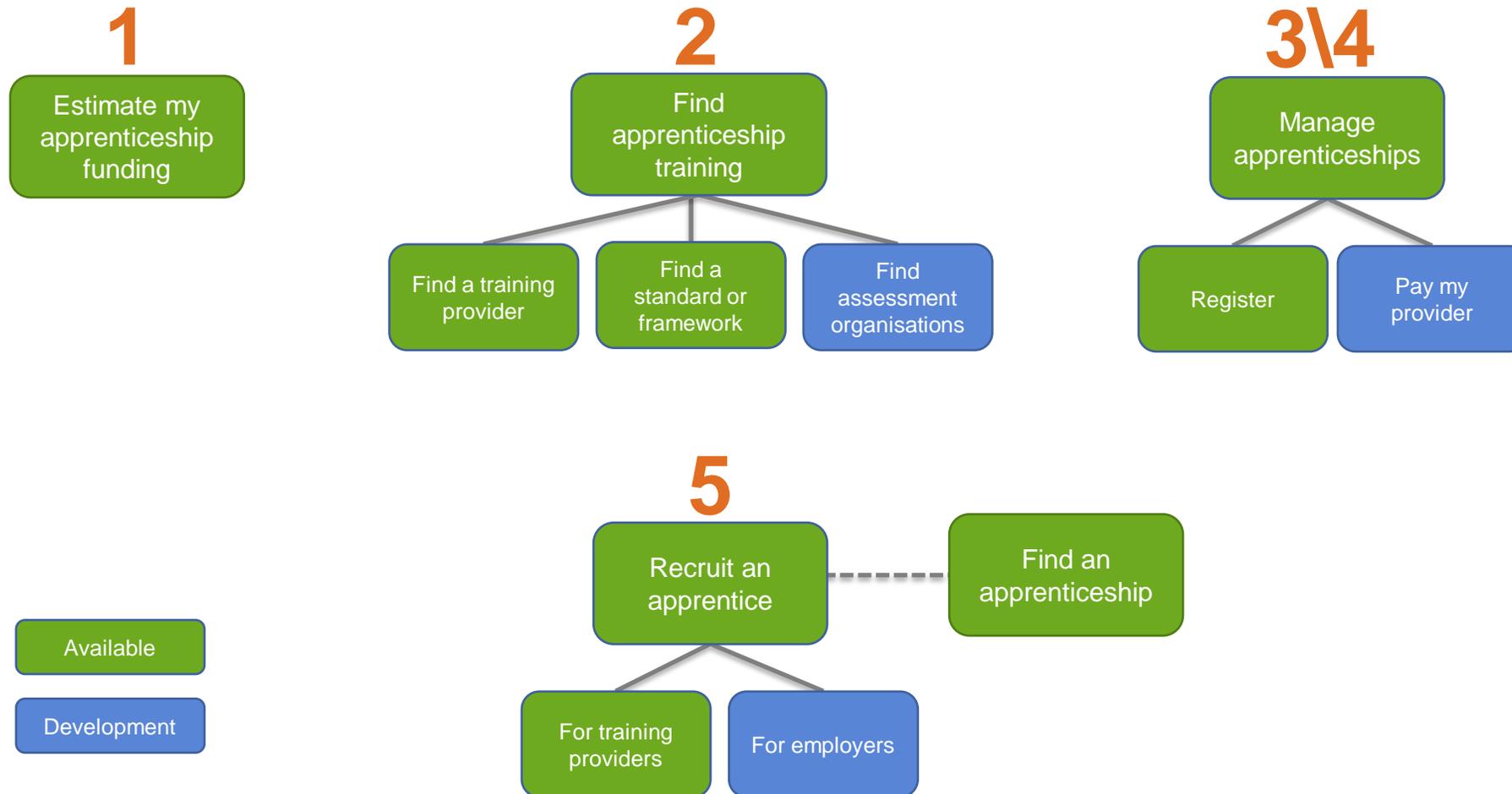


Apprenticeship service

Tools and support available to all employers

What is the apprenticeship service?

The apprenticeship service is made up of several functions



Apprenticeship service

- Screenshots from the development system
- Not all features are available when testing (BETA)
- Subject to change following user research



Estimate my apprenticeship funding

Skills Funding Agency Estimate my Apprenticeship Funding

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:

Skills Funding Agency Estimate my Apprenticeship Funding

Your monthly funding breakdown

Date	Levy credit	Cost of training	Co-investment		Balance
			Your share (10%)	Government share (90%)	
May 2017	£3,208	-	-	-	£3,208
June 2017	£3,208	-	-	-	£6,416
July 2017	£3,208	-	-	-	£9,624
August 2017	£3,208	£6,000	-	-	£6,832
September 2017	£3,208	£6,000	-	-	£4,040
October 2017	£3,208	£6,000	-	-	£1,248
November 2017	£3,208	£6,000	£154	£1,390	£0
December 2017	£3,208	£6,000	£279	£2,513	£0
January 2018	£3,208	£6,000	£279	£2,513	£0
February 2018	£3,208	£6,000	£279	£2,513	£0
March 2018	£3,208	£6,000	£279	£2,513	£0
April 2018	£3,208	£6,000	£279	£2,513	£0

[Add another 12 months](#)

Find apprenticeship training

Find apprenticeship training

Business and Administration

[Find training providers](#)

This information is taken from an apprenticeship framework. It sets out what qualifications the apprentice can achieve.

Summary of this apprenticeship framework

Level	3 (equivalent to A levels at grades A to E)
Typical length	18 months
Entry requirements	Your chosen training provider can advise you about entry requirements for apprentices.
Suitable roles for apprentices	<ul style="list-style-type: none">• Administration Officer / Administration Executive• Administration Team Leader / Office Supervisor• Personal Assistant• Secretary Your chosen training provider can advise you about the kinds of skills

Find apprenticeship training

Search results

176 training providers for the **Business and Administration, level 3** apprenticeship. Results are ordered by distance from 'CV1 2WT'. Results labelled **National** are training providers who are willing to offer apprenticeship training across England.

Filter results

Training options

- day release (59)
- block release (37)
- at your location (157)

[Explain training options](#)

Day release: for example one day a week at the training provider's location.

Block release: for example 3-4 weeks at the training provider's location.

[LEARNDIRECT LIMITED](#) National

Distance: 0.1 miles away
Training options: at your location
Employer satisfaction: 51%
Learner satisfaction: 80%
Achievement rate: 70%

[BUSINESS MANAGEMENT RESOURCES \(UK\) LTD](#)

Distance: 0.2 miles away
Training options: at your location
Employer satisfaction: 95%
Learner satisfaction: 89%
Achievement rate: 85%

[Inspire 2 Independence \(i2i\) Ltd](#)

Distance: 0.3 miles away
Training options: at your location
Employer satisfaction: no data available

Recruit an apprentice and Find an apprenticeship

GOV.UK Search

Recruit an apprentice

This service is for registered training providers (including large employers with direct grant funding) to post vacancies and manage applications for apprenticeships and traineeships.

Most employers need to [find a training organisation](#) to recruit apprentices for them.

[Start now >](#)

Before you start

You need to have an account with the government's [Information Management Services system](#) to use this.

You'll get your account details when you [register as a training provider](#).

Help

[Employing an apprentice](#)

[Find an apprenticeship](#)

[Become a recognised apprentice training agency](#)

GOV.UK Find an apprenticeship

Business Administration and Support Apprenticeship

AATOM RECRUITMENT LTD

[Return to search results](#)

[Print this page](#)

Are you a good communicator? Do you have a flair for administration? Would you like to work for a professional recruitment business while completing a level 2 apprenticeship? If so, read on.

[Sign in to apply](#)

Closing date: 31 Nov 2016

Apprenticeship summary

Weekly wage £121.25	This well-known recruitment business is looking for an apprentice to support in an admin and sales role.
Working week Mon-Fri 9am - 5pm Total hours per week: 37.50	The role includes:
Apprenticeship duration 12 months	- Speaking to businesses to determine their needs for recruitment, processing all the required information.
Possible start date 28 Nov 2016	- Entering data into the business CRM system and ensuring these are correct.
Date posted yesterday	- Speaking to clients to discuss vacancies and also interviews.
Distance 0.2 miles	

Manage apprenticeships

Register securely to set up an employer account
and view your available funding

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

What you'll need

Your levy funds are based on the levy amounts you declare to HMRC through your PAYE schemes.

To access your funds you will need:

- the Government Gateway login details for your PAYE schemes (ask your payroll department if you don't have access to this)
- your organisation's Companies House Number or Charity number (only if your organisation has one)

Search for [your Companies House number](#) or [your Charity number](#)

Do you have everything you need?

- Yes, I have everything I need
- No, I don't have everything I need

Continue

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

Red & White Holdings Plc

► Joe Mc Doogke **1** [Change levy account](#)

[Home](#) [Finance](#) [Apprentices](#) [Manage your team](#) [Enable spending](#)

Levy account created

Manage your account

[Enable your organisations to spend levy](#)

Add and manage organisations that'll spend levy.

[Manage PAYE schemes](#)

Add levy funds to your account by adding PAYE schemes.

[View your finances](#)

View transactions and forecast your

[Spend your levy](#)

Add an apprentice or review and

Help us improve this section

Take a 3 minute survey about managing your account or invitations so that we can improve the service.

[Take the survey](#)

Users and privileges

GOV.UK Manage apprenticeships

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

Settings Sign out

Home Finance Apprentices **Your team** Organisations PAYE schemes

Home > Your team

Your team

[Invite a new member](#)

Invite members, control what they can do, remove members and cancel or resend invitations.

Name	What they can do	Status	
Paul Twine paul.twine@sfa.bis.gov.uk	Accept agreements, view information and manage PAYE schemes, organisations, apprentices and team members	Active	View

GOV.UK Manage apprenticeships

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

Settings Sign out

Home Finance Apprentices **Your team** Organisations PAYE schemes

[Back to your team](#)

Create invitation

Invite somebody to access this account.

Email
An invitation will be sent to this email address

Full name

Team member access
Choose the level of access this user can have.

- View information but can't make changes
- Add apprentices and view information
- Accept agreements, view information and manage PAYE schemes, organisations, apprentices and team members

Editing PAYE schemes and Organisations

The screenshot shows the 'Manage apprenticeships' dashboard on the GOV.UK website. The page title is 'Manage apprenticeships'. A beta notice at the top states: 'BETA This is a new service - your feedback will help us to improve it.' Navigation links include 'Settings' and 'Sign out'. The main navigation bar contains 'Home', 'Finance', 'Apprentices', 'Your team', 'Organisations', and 'PAYE schemes'. The breadcrumb trail is 'Home > PAYE schemes'. The main heading is 'PAYE schemes' with an 'Add new scheme' button. Below this, text explains that funds will credit the account from any PAYE schemes added, and that no funds will credit until May 2017. Under the heading 'Added PAYE schemes', there is a table with one entry: '123/SFAT075' with a 'Details' link.

PAYE schemes [Add new scheme](#)

Funds will credit your account from any PAYE schemes you add.

No funds will credit your account until May 2017.

Added PAYE schemes

123/SFAT075	Details
-------------	-------------------------

The screenshot shows the 'Manage apprenticeships' dashboard on the GOV.UK website. The page title is 'Manage apprenticeships'. A beta notice at the top states: 'BETA This is a new service - your feedback will help us to improve it.' Navigation links include 'Settings' and 'Sign out'. The main navigation bar contains 'Home', 'Finance', 'Apprentices', 'Your team', 'Organisations', and 'PAYE schemes'. The breadcrumb trail is 'Home > Organisations'. The main heading is 'Organisations' with an 'Add new organisation' button. Below this, text instructs to add organisations for hiring apprentices. A blue callout box contains a note: 'Before May 2017 you'll be asked to accept an agreement for each of your organisations that will spend levy funds. This agreement will allow the SFA to pay your training providers. We'll tell you when the agreement is available to read.' Below this, there is a form with the label 'Name' and the text 'Red and White Holdings PLC' entered.

Organisations [Add new organisation](#)

Add the organisations that you want to hire apprentices through.

Before May 2017 you'll be asked to accept an agreement for each of your organisations that will spend levy funds. This agreement will allow the SFA to pay your training providers. We'll tell you when the agreement is available to read.

Name

Red and White Holdings PLC

View your transactions

This is your current balance:

£5,340

on 20 August 2018

Transactions

Date	Description	Credit	Debit	Balance	
15 August 2018	Payment to provider Hackney Skills and Training Ltd		£379	£5,340	View
10 August 2018	Levy credit August 2018 10% bonus payment	£70		£5,719	View
10 August 2018	Levy credit August 2018	£704		£5,649	View
08 August 2018	Payment to provider Lots of skills Ltd		£347	£4,945	View
15 July 2018	Payment to provider Hackney Skills and Training Ltd		£379	£5,292	View
10 July 2018	Levy credit July 2018 10% bonus payment	£70		£5,671	View
10 July 2018	Levy credit July 2018	£704		£5,601	View
08 July 2018	Balance as at 08 July 2018			£4,897	

Credit details

Credit made on 12 Nov 2016.

PAYE scheme	Levy declared	English %	Top up	Paid in
123/SFAT075	£2,540.00	100.00%	£254.00	£2,794.00
				£2,794.00

Levy declared to HMRC might include negative adjustments from previous months.

Funds you could lose

If you don't spend your funds they will expire after 18 months.

At a glance

Expiring in < 3 months	£1,000
Expiring in 3 to 6 months	£2,051
Expiring in 6 to 12 months	£3,447

Details

Expiry date	of levy credit	
24 October 2018	April 2017	£1,000.00

Committed spending

View your committed spending until your final apprentice contract ends on: **14 December 2021**

Summary of committed spending

Time period	Committed spending
21 August 2018 -- 20 August 2019	£62,028
21 August 2019 -- 20 August 2020	£50,740
21 August 2020 -- 20 August 2021	£15,987
21 August 2021 -- 14 December 2021	£4,098
Total	£132,853

Apprentices

[Add a new apprentice](#)

Make sure your providers get paid by adding your new apprentices to the DAS.

[Review and approve cohorts](#)

Review and approve apprentices you and your training provider are adding to the DAS.

[View apprentices on programme](#)

View, pause and stop apprentices that you are currently paying for.

Key milestones

Please note that all dates are provisional and are subject to change.

2017	
January	<ul style="list-style-type: none">• Final Funding Rules to be published
February	<ul style="list-style-type: none">• Service open for registration
March	<ul style="list-style-type: none">• National Apprenticeship Week (6 to 10 March)• RoATP published
April	<ul style="list-style-type: none">• Levy collected
May	<ul style="list-style-type: none">• Service live• Make commitments (apprenticeship starts)
To 2020	<ul style="list-style-type: none">• All employers to use the service

Information and support

For more information search for '**apprenticeships**' or '**traineeships**' on **GOV.UK**

Register to manage your apprenticeship funds

<https://www.gov.uk/guidance/manage-apprenticeship-funds>

Apprenticeship agreement: legal agreement to enable spending

<https://www.gov.uk/government/publications/apprenticeship-funding-legal-agreement-to-enable-spending>

Skills Funding Agency Digital Blog <https://sfadigital.blog.gov.uk/>

Set up web alerts from **GOV.UK**

Contact us:

By phone: **0800 015 0600**

By email: Helpdesk@manage-apprenticeships.service.gov.uk

Available : 8am – 10pm (everyday)

3. The Institute for Apprenticeships and proposed key roles.

Mark Aberdein – Skills Funding Agency

Ready for launch

Presented by Mark Aberdein

March 2017

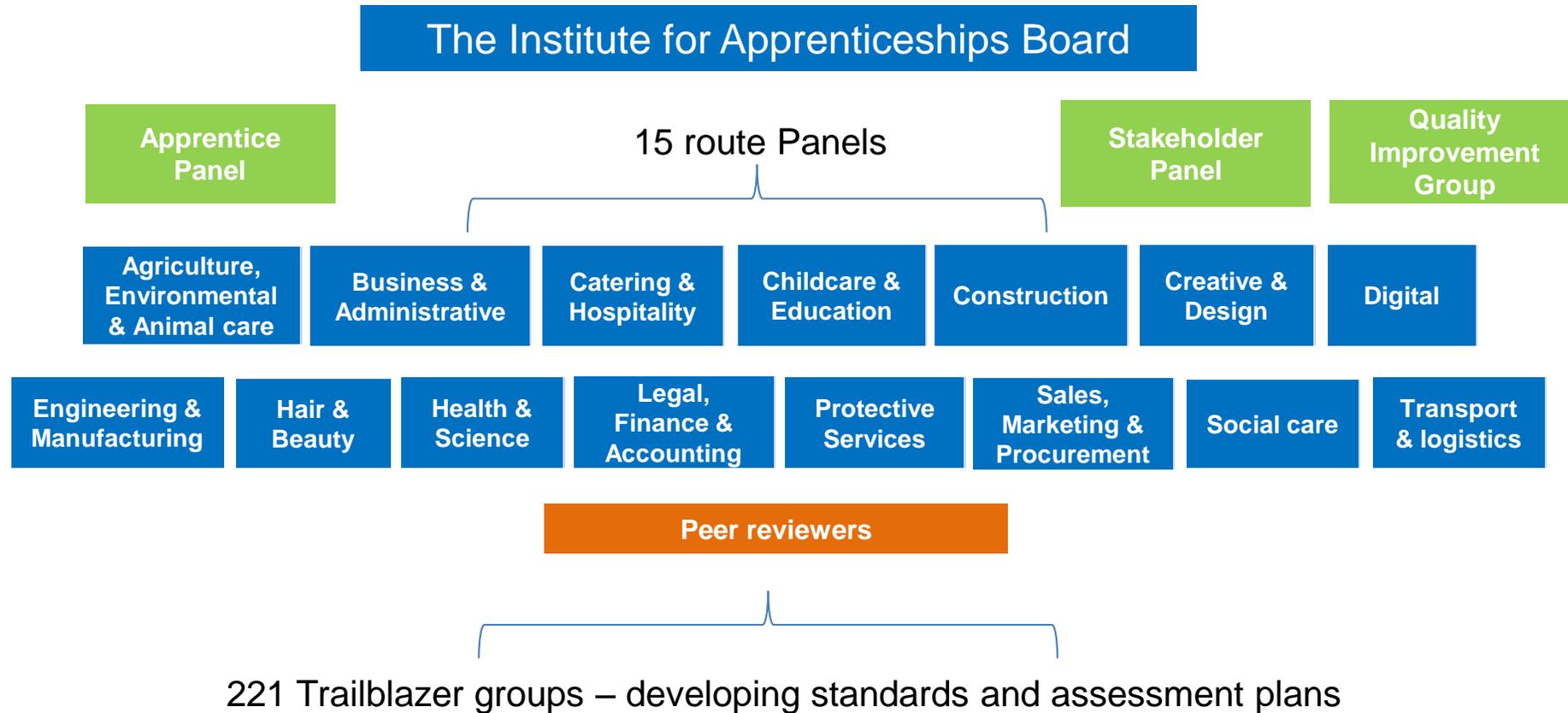
Driving the quality of apprenticeships in England

- The Institute is being established to drive the **quality of apprenticeships** in England, primarily through its role as the regulator of apprenticeship standards and assessment plans.
- It will be a permanent feature of the apprenticeships landscape, providing a **sustained focus on quality** in a sector that is undergoing huge amounts of change.
- The Institute will embed the **central role that employers must play** in the apprenticeships system if it is to operate effectively. Employers have a better understanding than Government of what their skills needs are and the Institute will continue to put them in the driving seat of developing the high quality standards they need.

Our core functions

- Developing and maintaining **quality criteria** for the approval of apprenticeship standards and assessment plans.
- Supporting the **development of standards and assessment plans by employer groups and reviewing and approving** them.
- **Publishing approved standards and assessment plans.**
- **Advising on** the maximum amount of Government **funding** that can be drawn down by employers for individual apprenticeship standards.
- Quality assuring the delivery of apprenticeship **end-point assessments**, where employer groups have been unable to propose other arrangements.

We are an employer led organisation



Employer members

To **drive up quality** and **foster greater industry expertise** the Institute will:

- establish **15 Route Panels** aligned to occupational groupings, comprised of industry experts to review and approve proposals, standards and assessment plans. Panel members will replace DfE and SFA officials as the panel that review and approve proposals
- the panels will be made up of a **range of experts** with a broad knowledge of occupations and training across a particular route
- a **Chair will be appointed** to each of the Route Panels by April 2017 with members for each panel being recruited by April 2018, up to a maximum of 15 per panel
- **genuine employer decision-making**

The Board



Antony Jenkins, Chair

Dame Fiona Kendrick
Chairman and CEO,
Nestle UK and Ireland



Dr Katherine Barclay
Director, UK Skills,
Worldwide R&D, Pfizer Ltd



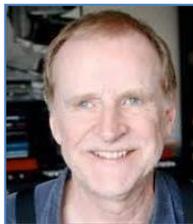
Toby Peyton-Jones
HR Director, Siemens UK
and Northern Europe



Bev Robinson
Principal and Chief Executive,
Blackpool and The Fylde College



Robin Millar CBE
Chairman, Blue Raincoat
Chrysalis Group



Lieutenant General
(Retd) Sir Gerry Berragan, KBE.
CB, Adjutant General,
the Army (2012-2015)



Dame Asha Khemka DBE
Principal and Chief Executive,
West Nottinghamshire
College Group



Paul Cadman
HR Director,
Walter Smith Fine Foods Ltd.



THE ORGANISATION

CEO
Peter Lauener



DCEO
Mike Keoghan



Standards
Development
Jonathan Mitchell

Approvals
Ana Osbourne

Funding Policy
Jayne McCann

Data Science
Alex Wilson

Set up and finance
Tony Singleton

Assessment
Nikki Christie

Corporate
Effectiveness
Helen Knee

Strategic Adviser
Richard Guy

Our vision – the Operational Plan

We consulted on the Institute’s Operational Plan. The Operational Plan will set out how the Institute will deliver its functions:

- our [reforms to improve the quality](#) of apprenticeships
- how we will [regulate the quality of apprenticeship standards and assessment plans](#)
- how the Institute will [collaborate with partners](#) to drive quality across the apprenticeships system
- more information on how we will lead the [reforms to technical education](#)
- how we will successfully [implement](#) the new system

An improved system

The Institute will take the lead on a number of ongoing reforms to improve the apprenticeships system. There are **three defining features** of the emerging system that the Institute will regulate:

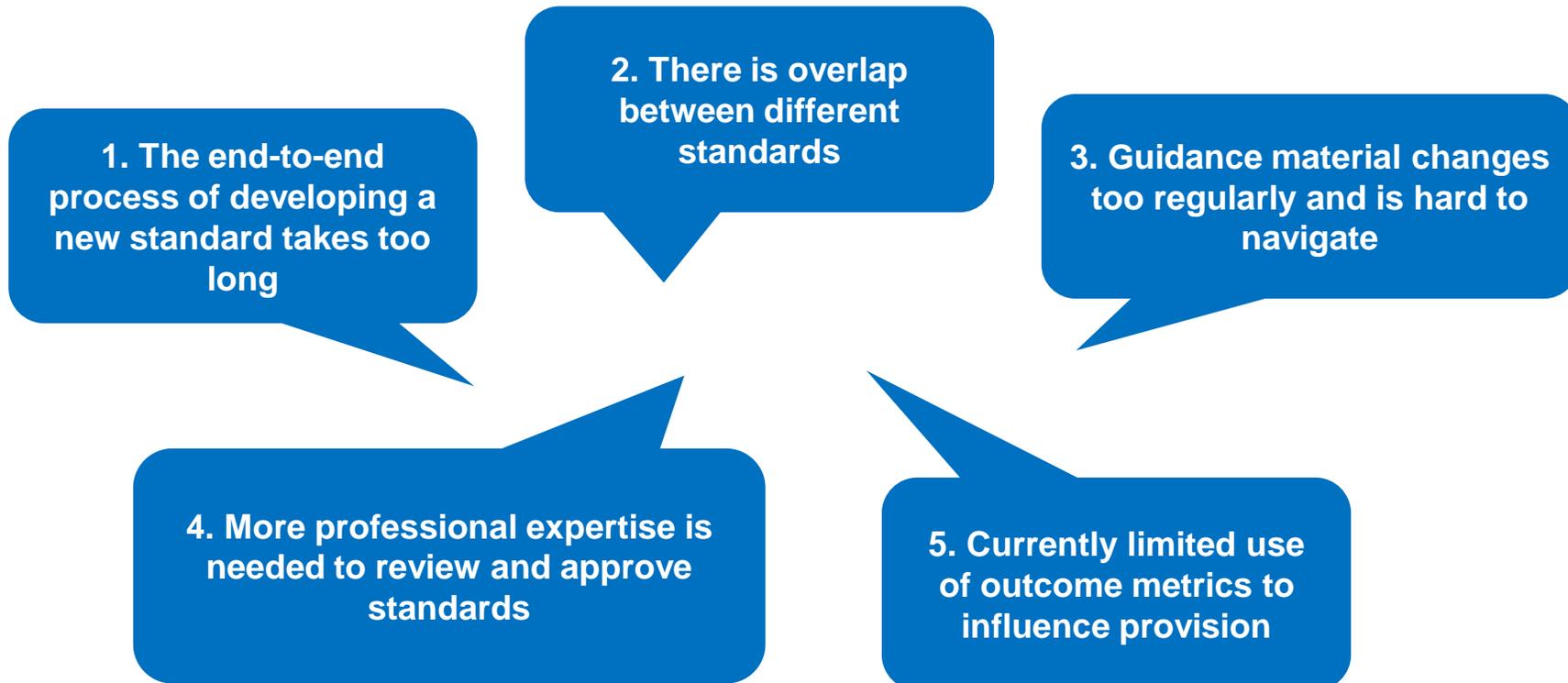
- employer-designed apprenticeship standards and assessment plans
- graded end point apprenticeship assessments
- external quality assurance of end point assessments

Plus we will adopt the following principles:

- minimise changes
- communicating early and clearly
- better use of digital
- greater professional expertise: industry-led Route Panels; Relationship Mangers; and enhanced peer reviews

Improving quality

Our challenges...



Improving quality

Standards development

Clearer expectation-setting; flexibility for employer groups, tailored support.

Overlap

Better signposting; occupational maps; short term activity with partner bodies.

Guidance on funding

A robust process for providing advice to Government on the appropriate funding band allocation for new apprenticeship standards, in the new levy world.

Assessment

The Register of Apprenticeship Assessment Organisations; external quality assurance (EQA).

Metrics

Route-based evaluations of standards, wider range of data.

Standards development

- Develop a pre-proposal stage ‘getting started’ support package for employers.
- Development of digital tools.
- Introduce greater industry expertise into the review and approval of standards.
- Tailor support for employer groups based on an early assessment of their needs.
- Combine flexibility and rigour in the approvals process, including creating Route Panels to lead on the review and approvals process, inviting the employer group Chair to participate in the review meeting.
- Improve access to information and guidance on the development process, including making it easier to navigate the system and locate ‘In development’ and ‘Approved for delivery’ standards.
- Make more use of learner, employer and wider economy outcome data when reviewing the success of standards.
- Explore opportunities to speed up the end-to-end process for developing an apprenticeship standard, whilst retaining appropriate scrutiny and rigour of review.
- Establish a monitoring and evaluation function within the Institute, including initiating the first route based evaluations of standards.

Overlap....



**Collaborating with partners to
drive up quality and creating
the Apprenticeship Quality
Improvement Group**



Guidance on funding

The introduction of an [apprenticeship levy from April 2017](#) is the biggest change to apprenticeship funding since modern apprenticeships were re-introduced in the mid-1990s.

From April 2017, the Institute will establish a robust process for providing advice to Government on the appropriate funding band allocation for apprenticeship standards, in line with the Secretary of State's remit letter to the Institute which includes:

- allocating new [standards to agreed funding](#) bands
- [changes to existing funding band allocations](#) as part of its cyclical evaluation of standards within selected routes
- the nature and level of [additional payments](#) for certain types of learner or employer
- the Institute will explore options for building a better understanding of the social and economic impact of individual standards so that it can include a greater recognition of the [strategic return on investment](#) from apprenticeships in its funding advice to Government

Assessment

There will be two main controls in place to maintain consistently high quality **End Point Assessments** (EPAs).

1. The Register of Apprenticeship Assessment Organisations.
2. External quality assurance.

We are building four types of **external quality assurance** (EQA) into the system to reduce the risk of assessment inconsistencies emerging:

Employer-led

The employer group proposes its own approach for employers checking for consistency between assessments.

Professional body-led

An industry association delivers the role on behalf of their employers.

Ofqual-led

The EPA is a qualification Ofqual regulates.

Institute-led

The Institute provides external quality assurance on behalf of employers.

Assessment

Future access to the apprenticeship training and assessment markets will be governed by two new apprenticeship-specific registers:

- the [Register of Apprenticeship Training Providers \(RoATP\)](#)
- the [Register of Apprenticeship Assessment Organisations \(RoAAO\)](#)

The Institute will have a role in maintaining the quality on each of these:

- [setting the quality criteria for the registers](#) which training and assessment organisations have to meet. Provider feedback tells us that the current process for accessing the registers can lack transparency and sometimes hinder smaller providers' chances of becoming an approved provider. The Institute will follow up on these concerns as a priority during its first year
- [recommending the SFA to take action where the Institute has concerns over the quality of particular organisations](#), including removing an organisation from the relevant register if needed. Overall responsibility for the RoATP will remain with the SFA's Accounting Officer, but the Institute will be take on full ownership of the RoAAO from April 2017, with the SFA continuing to operate it on a day-to-day basis

Leading the reforms to technical education

From April 2018 the Institute proposes to:

- establish a common framework of 15 routes across all technical education, encompassing both college-based and employment-based learning
- bring together panels of professionals for each route to advise on the knowledge, skills and behaviours needed
- manage nationally recognised certificates for each technical education route at levels 2 and 3
- maintain a register of technical qualifications at levels 4 and 5, whether existing or new, which are eligible for public subsidy through Government-backed student loans

Thank you.

INSTITUTE FOR APPRENTICESHIPS
151 Buckingham Palace Road, London SW1W 9SZ
Cheylesmore House, 5 Quinton Rd, Coventry CV1 2WT

4. Delivery, monitoring and assessment of Behavioural Aspects

Kristian Hind – EEF Technology Centre



Kris Hind

Delivery Liaison & Development
Manager JLR

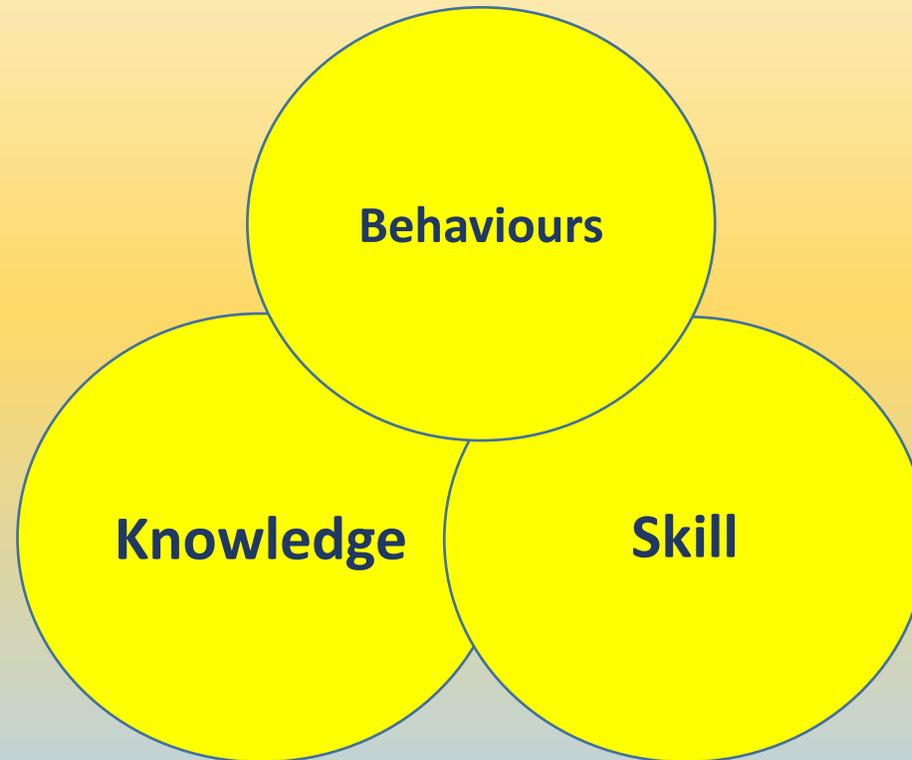


Behaviours and Apprenticeships

eeef

The
manufacturers'
organisation

WHY?



The Past



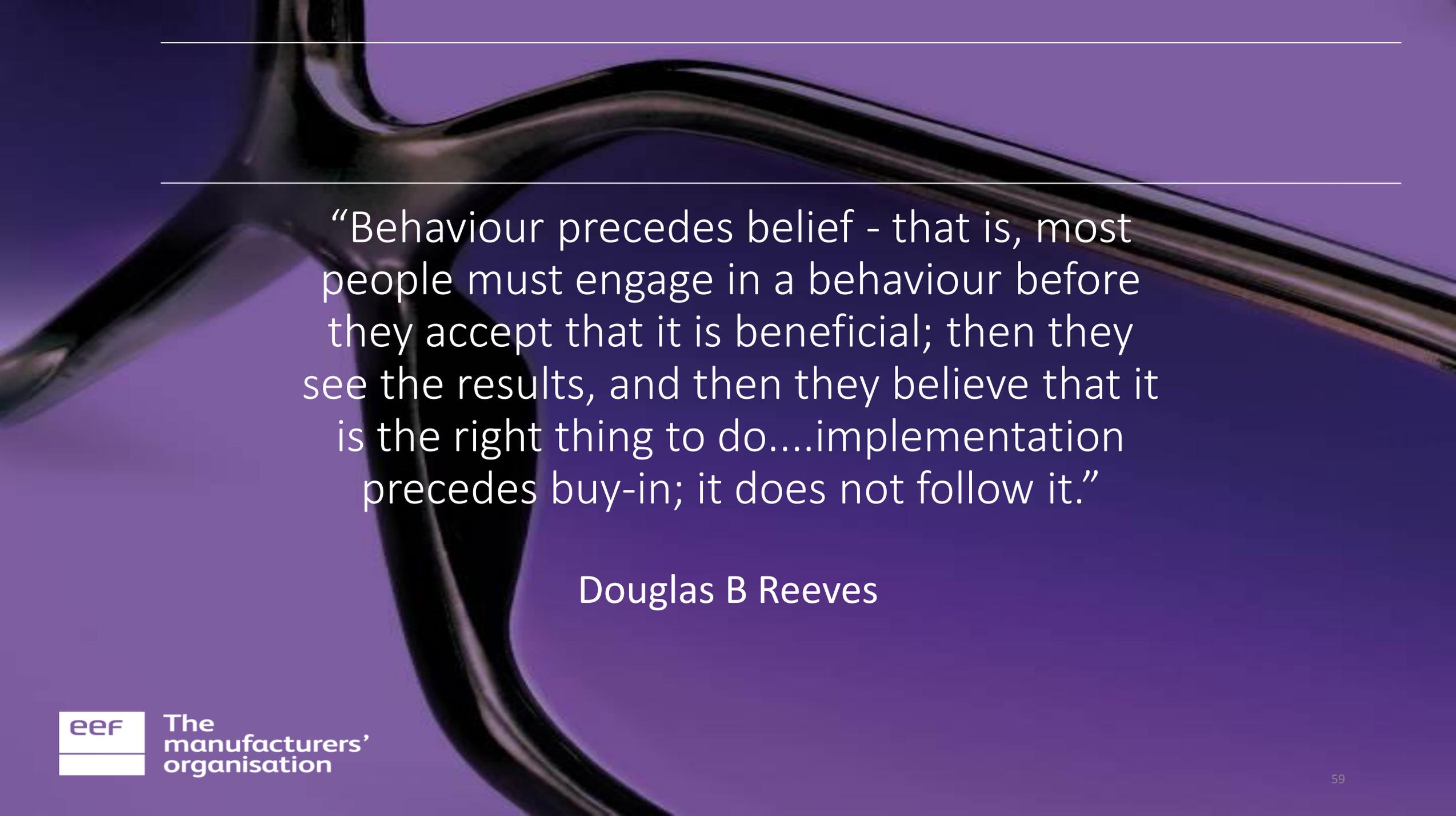
The Future



Behaviours

“We create our fate every day . . . most of the ills we suffer from are directly traceable to our own behaviour.”

Henry Miller



“Behaviour precedes belief - that is, most people must engage in a behaviour before they accept that it is beneficial; then they see the results, and then they believe that it is the right thing to do....implementation precedes buy-in; it does not follow it.”

Douglas B Reeves

I
DON'T
CARE

Why should
I care?

Criteria	Personal Responsibility & Resilience					S'visor	Self
	1	2	3	4	5	Select rating 1-5	
Understands & strictly complies with H&S guidance & procedures	Despite instruction pays little regard to H&S requirements	Usually demonstrates understanding & importance of H&S requirements	Always demonstrates understanding & importance of H&S requirements	... & challenges other people on H&S compliance	... & also frequently advocates best practice to others	2	5
Disciplined & responsible approach to risk	Disregards / lacks awareness of importance of assessing risk	Follows standardised procedures for assessing risk	Dynamically assesses / controls risk in current environments	Dynamically assesses / controls risk in all environments	Proactively assesses / controls risk in all environments	1	4
Works diligently, regardless of how much they are being supervised	Abuses trust and needs regular prompting to keep on track	Needs occasional prompting to keep on track. Easily distracted or distracts others	Can be trusted to work on own when appropriate, knowing who & where to seek help from if needed.	Sets an example to others by always working hard even when on own	Challenges others on poor behaviour and provides encouragement to keep others on track	2	3
Accepts responsibility for managing time & workload	Does not accept personal responsibility	Tries to manage time & workload but needs guidance	Usually manages own time & workload	Almost always manages own time & workload well	... & reflects on how to do things more effectively	1	4
Stays motivated & committed, when facing challenges	Generally lacks motivation & commitment	Is usually motivated & committed when things are going well	Stays motivated & committed, when facing small challenges	Is motivated & resilient when facing significant challenges	...over a long period	3	4
Reviewers Overall Competency Rating (Rounded to whole number)						2	
Apprentice Comments I take personal responsibility very seriously -			Reviewers Comments Does not know how to take personal responsibility				
Criteria	Effective Communication & Interpersonal Skills					S'visor	Self
	1	2	3	4	5	Select rating 1-5	
Open & honest communication	Does not share information with others	Sometimes holds information back	When asked or when in discussions, is open & honest	Readily shares information openly & honestly	Proactively shares information, openly & honestly at all times	4	2
Communicates clearly using appropriate methods	Uses inappropriate methods, or language on occasion	Communication is sometimes unclear or methods not effective	Communicates clearly when required, using a number of methods	Communicates clearly & timely using appropriate methods	... & confidently tailors approach to different audiences e.g. presentations	4	2
Listens well to others	Frequently doesn't pay attention &/or needs to be told things repeatedly	Pays attention but fails to ask questions if they don't understand	Pays attention & asks relevant questions to clarify understanding	... & confirms understanding when appropriate e.g. by repeating	Checks understanding of relevant others by asking open questions	3	3
Positive and respectful attitude	Appearance or attitude frequently has negative impact on others	Appearance or attitude sometimes has negative impact on others	Attitude is usually respectful & positive, rarely has negative impact on others	Attitude is almost always respectful & positive & never has a negative impact on other people	... & frequently goes out of way to represent the business positively	4	2
Reviewers Overall Competency Rating (Rounded to whole number)						4	
Apprentice Comments I am very shy and don't talk much			Reviewers Comments A good communicator with good potential				

Embrace

Contribute

Invest

Because

It

Believe

matters



The
manufacturers'
organisation

Criteria	Personal Responsibility & Resilience					S'visor	Self
	1	2	3	4	5	Select rating 1-5	
Understands & strictly complies with H&S guidance & procedures	Despite instruction pays little regard to H&S requirements	Usually demonstrates understanding & importance of H&S requirements	Always demonstrates understanding & importance of H&S requirements	...& challenges other people on H&S compliance	...& also frequently advocates best practice to others	3	4
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Accepts responsibility for managing time & workload	Does not accept personal responsibility	Tries to manage time & workload but needs guidance	Usually manages own time & workload	Almost always manages own time & workload well	...& reflects on how to do things more effectively	2	4
Stays motivated & committed, when facing challenges	Generally lacks motivation & commitment	Is usually motivated & committed when things are going well	Stays motivated & committed, when facing small challenges	Is motivated & resilient when facing significant challenges	...over a long period	3	3
Reviewers Overall Competency Rating (Rounded to whole number)						3	
Apprentice Comments I feel that I have a good awareness on Health and Safety and can be trusted to work alone, I have not been late for work at all since starting my apprenticeship so believe that I manage my own time and workload well.			Reviewers Comments Alex is very aware of H&S requirements and is a very trustworthy apprentice. He has, however, submitted a couple of late assignments this term and does need to consider the implications of this. He is motivated though and I am sure that with the right guidance he will rectify the slightly lower performance assessment with late assignment submissions.				
Criteria	Effective Communication & Interpersonal Skills					S'visor	Self
	1	2	3	4	5	Select rating 1-5	
Open & honest communication	Does not share information with others	Sometimes holds information back	When asked or when in discussions, is open & honest	Readily shares information openly & honestly	Proactively shares information, openly & honestly at all times	3	4
Communicates clearly using appropriate methods	Uses inappropriate methods, or language on occasion	Communication is sometimes unclear or methods not effective	Communicates clearly when required, using a number of methods	Communicates clearly & timely using appropriate methods	...& confidently tailors approach to different audiences e.g. presentations	4	3
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Positive and respectful attitude	Appearance or attitude frequently has negative impact on others	Appearance or attitude sometimes has negative impact on others	Attitude is usually respectful & positive, rarely has negative impact on others	Attitude is almost always respectful & positive & never has a negative impact on other people	...& frequently goes out of way to represent the business positively	4	4
Reviewers Overall Competency Rating (Rounded to whole number)						3	
Apprentice Comments I consider myself a good communicator and will always talk openly and honestly. I think that paying full attention in class is very important but I get quite shy when it comes to asking questions in case they appear to be stupid.			Reviewers Comments Alex is a clear and able communicator, he is quiet in class though and does hold back on asking questions when I can quite often see that he wants to. Confidence development techniques would definitely benefit him as he is certainly very respectful and has the ability to positively contribute to the class dynamic.				

High Performance Behavioural Review Document

- Personal Responsibility & Resilience
- Effective Communication & Interpersonal Skills
- Working Effectively in Teams
- Focus on Quality and Problem Solving
- Continuous Development

High Performance Behavioural Review Document

- By implementing and maintaining the behavioural framework, we believe it will ensure that the apprentices are operating at a level that meets the employers' requirements and the standards.
- By constantly monitoring apprentices in their ability not only to perform as future engineers but also developing their personal skills and behaviours by providing high levels of support in helping them achieve this.
- It enables the apprentices to fully understand the effect on others of their behaviours by:
 - Monitoring throughout working week against framework
 - Reinforcing ethos and ethics described within framework
 - Regular planned reviews with appropriate staff
 - 1:1 interviews with learners to discuss reviews, personal assessment and SMART objectives and achievements
 - Provide support frameworks in any areas of underperformance or weakness
 - To appropriately record all information relating to the above

High Performance Behavioural Review Document

- By maintaining this level of consistency in monitoring and support with behaviour and personal characteristics, it is realistic to expect an overall performance enhancement.
- By raising awareness amongst apprentices of the importance of observing appropriate behaviours.
- Note: Do not underestimate the time and training that staff need in order to successfully complete behavioural reviews.
- It can assist if assessments build behaviours into them to get apprentices used to being assessed on behaviours.

??? Questions ???



eef

The
manufacturers'
organisation

Tea Break

Resume at 15:10pm

5. Training delivery and Assessment Models

Andrew Parsons - Toyota Manufacturing UK

Sarah Drew – Burton and South Derbyshire College

BSDC / TMUK – TRAILBLAZER DELIVERY



Toyota's Role in Education

- Toyota is committed to the long term success of a dynamic and expanding Manufacturing and Engineering sector in the UK.
- This requires that we create an environment where Manufacturing and Engineering are valued and respected as part of the UK economy and society. We can achieve this through “partnership working”:-
 - With UTCs and schools
 - With Partner organisations such as BSDC, Derby University, I.Mech.E., World Skills UK, Foyer Federation, YMCA etc.
 - **With Sector bodies – i.e. Trailblazers**
 - **With other OEM's and SME's (Apprentice Provision)**



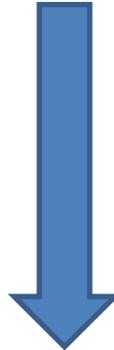
The Automotive Trailblazer Group

- 2013 – Government call for trailblazer groups to be formed
- Auto group formed as one of the first 8 Trailblazer groups
- The Auto group is made up of large employers and supporting parties, including SME's and trade bodies (acting as representatives of SME's).



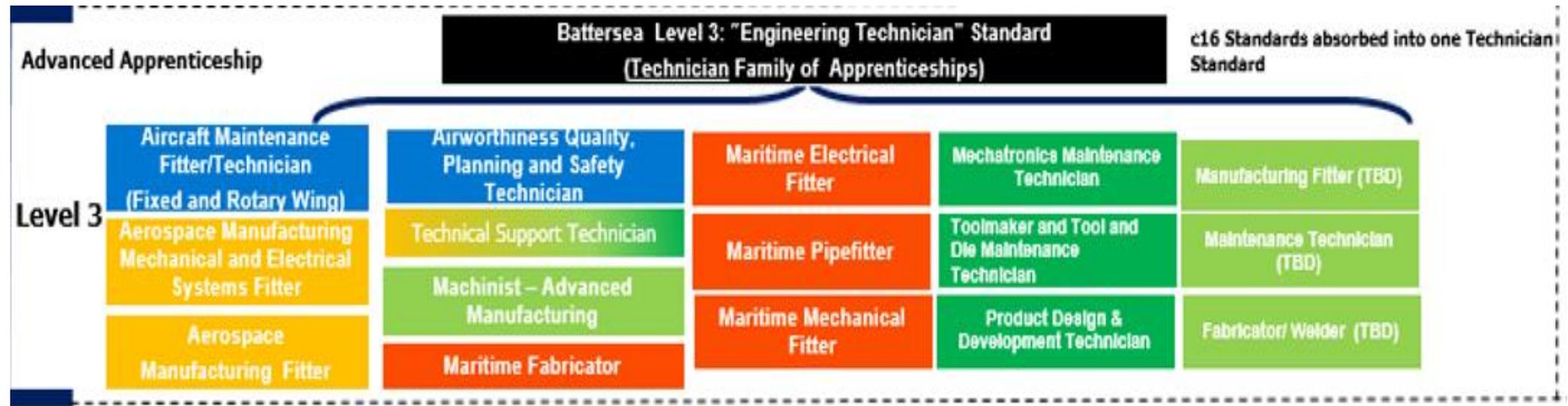
Auto Group activities

- Monthly meetings, well attended (20- 30). Sub groups now take responsibility for developing new standards
- The Automotive Trailblazer group is leading the way and is developing or supporting on 30 standards – amongst the largest number of standards of any sector.
- The Auto group is also working with other groups across Engineering/Manufacturing to ensure alignment, consistent approach and avoidance of duplication of standards.

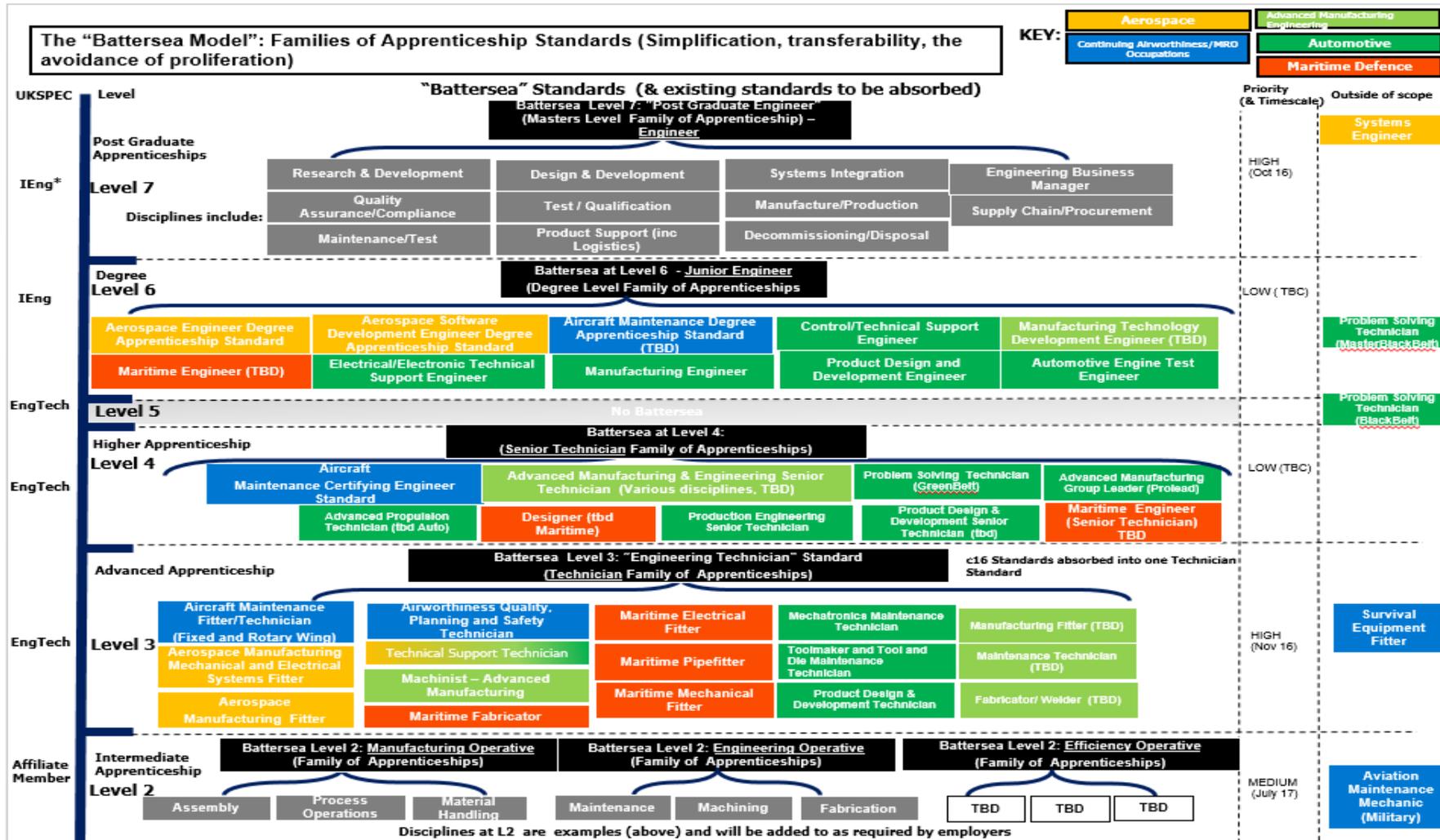


Stage of Development of Standard	Number
(i) Identification of need and consultation, drafting of EOI	9
(ii) Submission of 'Expression of Interest' (EOI) to DfE.	10
(iii) Development and submission of 'Standard' to DfE	2
(iv) Development and Submission of Assessment plan to DfE	3
(v) Approved for Delivery and published	6

Cross – Sector ‘Battersea’ Model at L3



Cross – Sector ‘Battersea’ Model



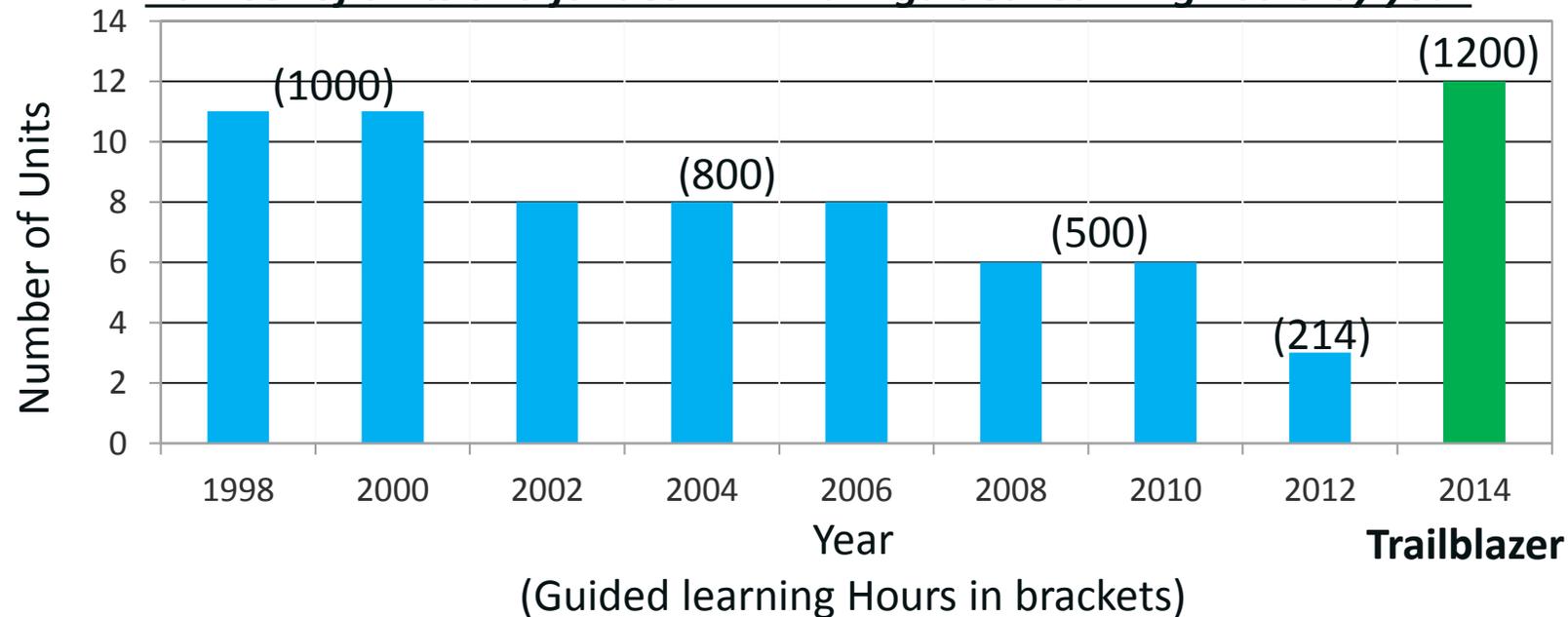
Auto Group 'Mechatronics' Design

**KEY
TASK**

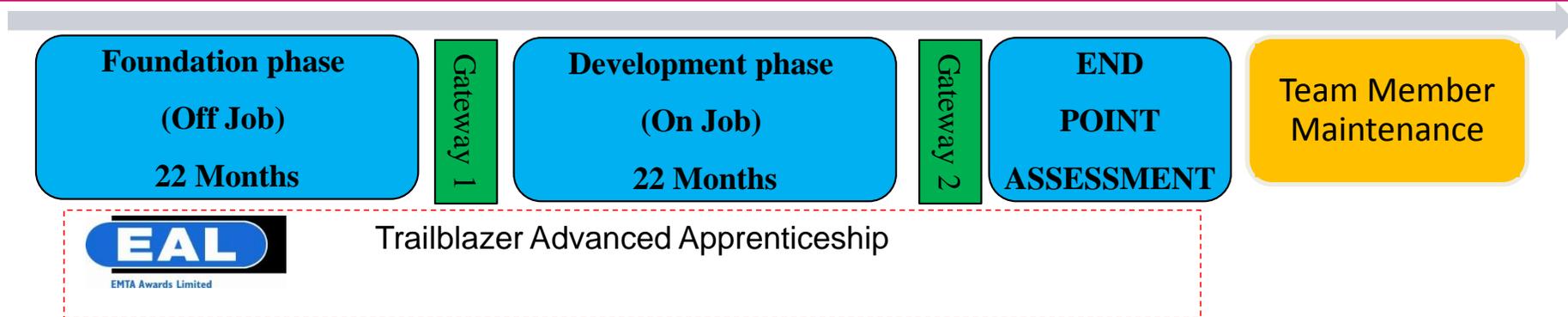
Study and make group vision of an ideal automotive manufacturer maintenance apprenticeship

- Benchmarked UK and Germany.
- Existing qualifications reviewed.
- Gap analysis carried out
- Identified minimum 1200 hours off job required for each apprentice

Number of units and funded minimum guided learning hours by year



BSDC/TMUK Mechatronics delivery



22 Month off job Foundation phase includes:-

- **TWELVE** L2 'PEO' (equivalent) units
- 720 GLH (**ELEVEN**) L3 Tech Certificate units
- 4 Weeks fixed holiday (shutdowns), 8 Weeks 'in company' work experience
- 6 Weeks flexible (dependant on student and employer needs)
- 3 weeks Personal Development including Outward bound and 'volunteering week'
- Modular delivery – each course delivered as a whole (1 to 4 weeks)

22 Month off job Foundation phase includes:-

- **TEN** L3 Competence Units (NVQ L3) 2 'PEO' (equivalent) units

Provides full multi skill output

BSDC / TMUK Results and Benefits

- Toyota success – improved retention, coupled with efficiency savings
- Supply chain previously asked about apprentices but they felt complex and expensive - why not help our suppliers and local engineering companies?
- Now 25+ ‘partner companies’ and 30+ apprentices each year

BENEFITS:

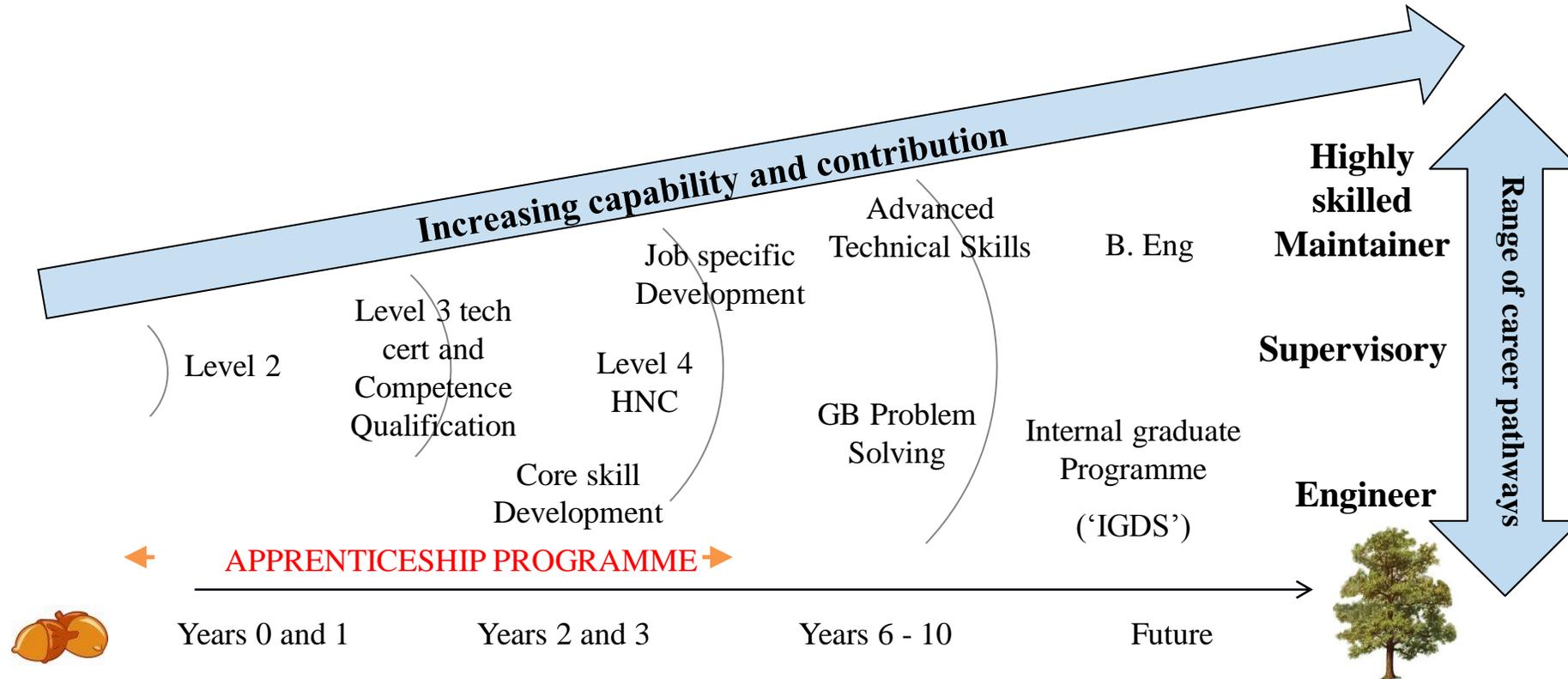
- Supports supply chain and local industry, Is Enabler for Apprenticeships
- Attractor into Engineering careers (for visiting schools, local PR etc)
- Economies of scale – partner apprentices offset costs of large ‘in company’ centre



- **SEMTA INNOVATION AWARD WINNER 2014**
- **SEMTA TRAINING PARTNER OF THE YEAR WINNER 2015**
- **MARCH 2015 NICK BOLES VISIT “GOLD STANDARD”**

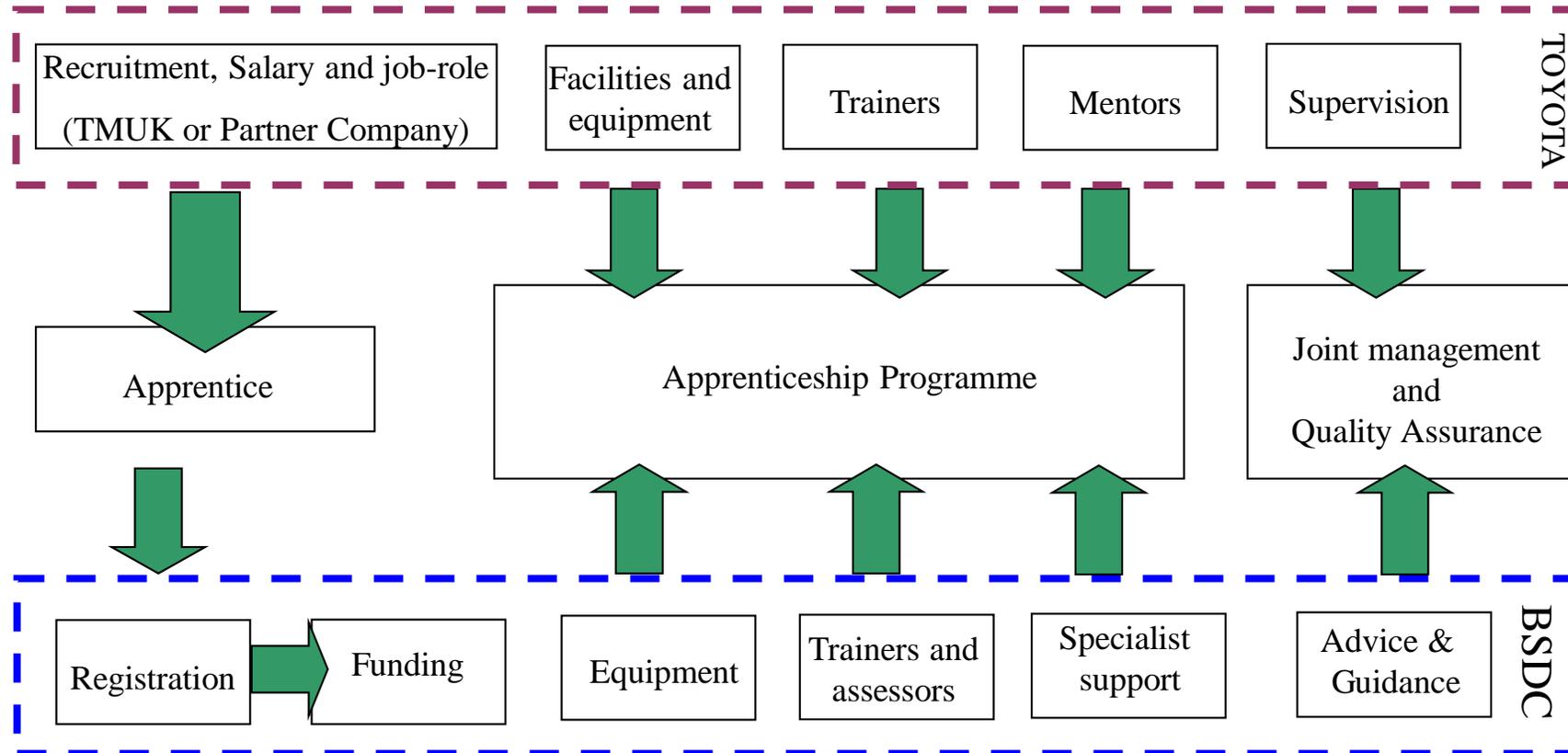


BSDC / TMUK Vision and Mission



To develop motivated, capable and high contributing Apprentices who can undertake a range of key careers in our Industry

BSDC/TMUK operations model



Is unique and a true partnership

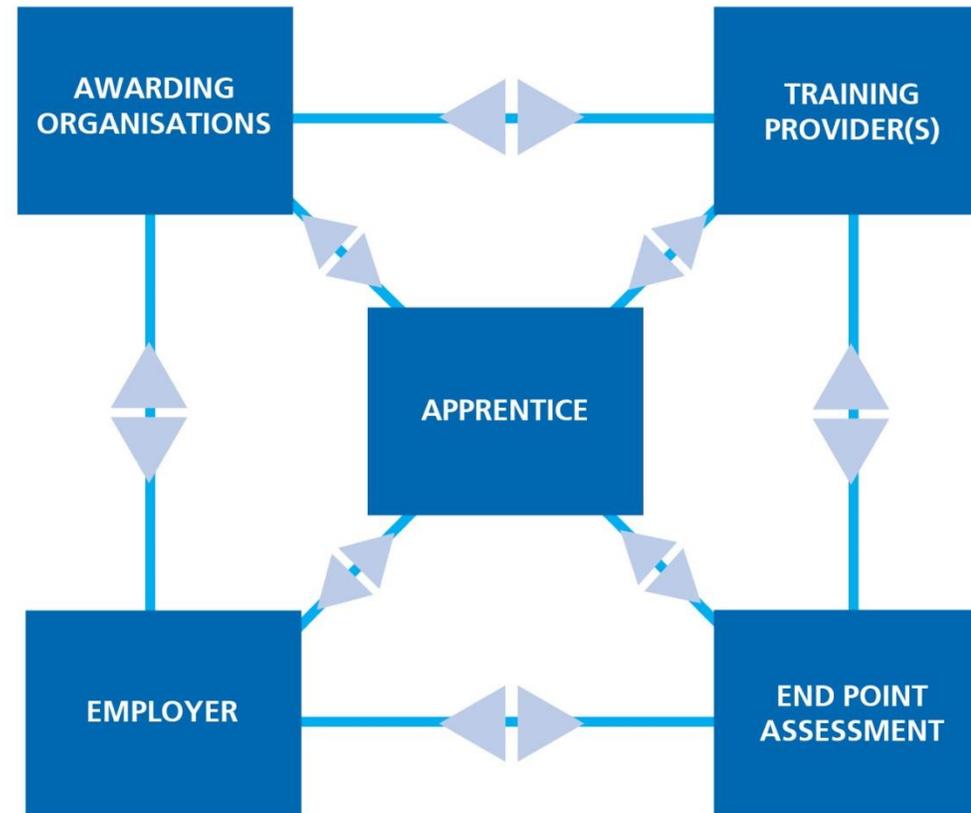
Trailblazers – what have we learned so far?

- BSDC & TMUK context and involvement
- Frameworks to Standards
 - similarities - what remains the same
 - differences – what has changed, how and why
- Benefits for employers
- Challenges for the market place

Frameworks to Standards: similarities

- Key ingredients remain:
 - Knowledge qualifications
 - Practical competency assessment
 - Government funding / subsidy
 - On the Job / Off the Job
 - Apprenticeship Agreements & documentation
 - Government funding & employer contributions

Frameworks to Standards: similarities



Frameworks to Standards: differences

- Focus on knowledge, skills and behaviours as constituent elements of a whole person approach to **occupational readiness** – *Creating the best engineer and employee*
- Funded at Standard level not via individual component qualifications
- Greater than the sum of its parts – integration, depth and rigour in pursuit of an end goal

Frameworks to Standards: differences

- End point summative synoptic assessment
 - *Employers decide – active participants*
 - *Binary judgement of competency*
 - *Graded assessment of knowledge and behaviour*
- Qualifications provide indicative “gateways” to progression - new/intensified qualifications from Awarding Organisations:
 - City and Guilds
 - EAL
 - Pearson Edexcel
- Intensive off the job training required in foundation phase

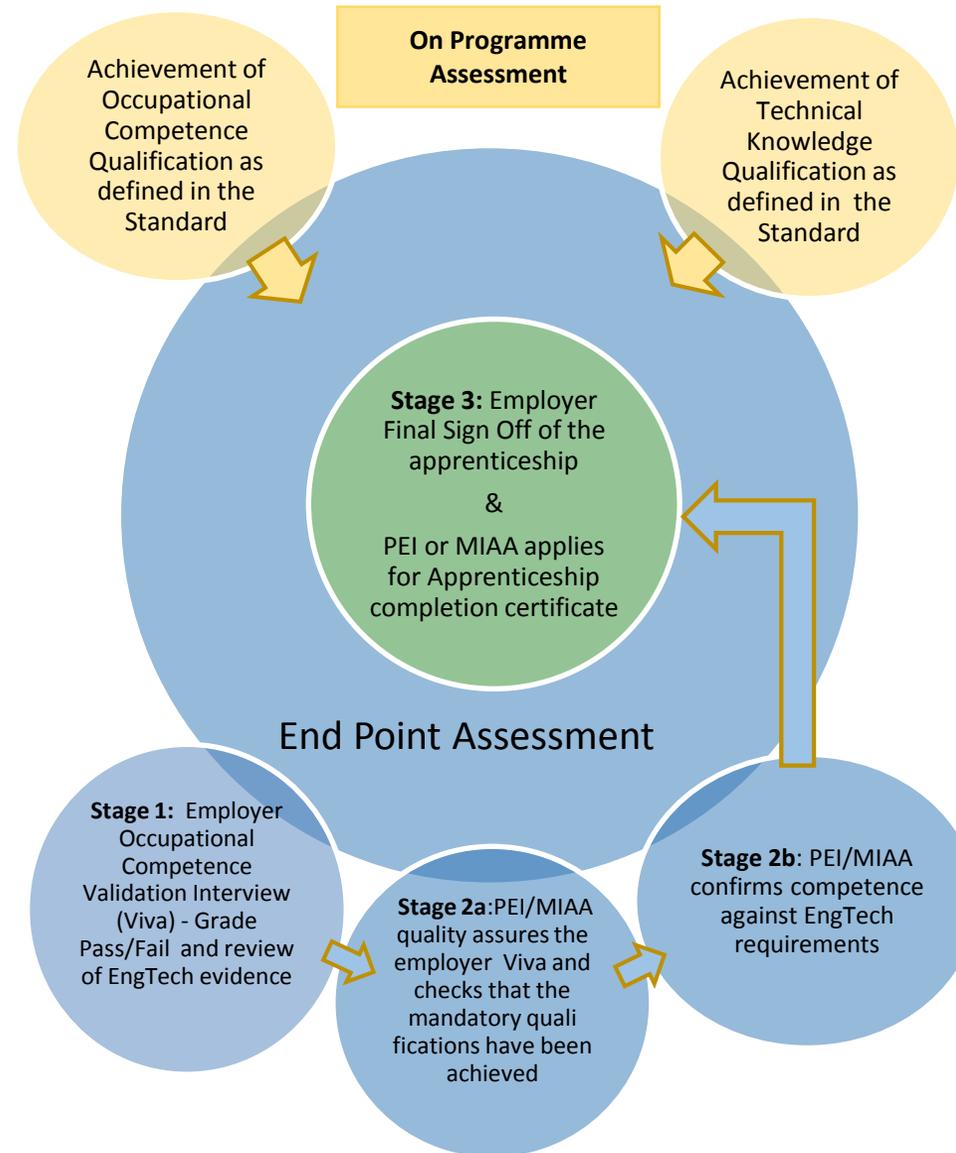
Designed by and for employers

- Employer Occupational Brief
- Foundation phase – aligned to level 2 – off the job
 - Skills evaluated through NVQ units - 1400 directed GLH
 - Knowledge evaluated through practical assessment and exam resulting in credits towards an externally assessed Technical Certificate – 720 GLH
 - Behaviours evaluated by tutors, assessors and employers using BARS (Minimum 12 week reviews)
 - Foundation end point synoptic assessment covering Skills, Knowledge and Behaviours (scenario-based skills and behavioural testing - one to three days)

Designed by and for employers

- Development phase – aligned to level 3 +
 - Skills evaluated through mandatory NVQ units (new qualifications)
 - Behaviours evaluated by assessors and employers using BARS (Minimum 12 week reviews)
 - End of Development phase gateway must be achieved to progress to end point summative assessment and employer endorsement

Battersea - End Point Assessment model



End Point Assessment

- Synoptic review of all three aspects (Skill, Knowledge and Behaviour) from evidence and performance data
- Employer tests occupational competency and readiness through employer interview/viva
- Employer Sign Off – Occupational Readiness
(But still in design)

Benefits for Employers

- Focus on developing individuals beyond the achievement of qualifications
- Standards represent shared view of employers
- Job role focused – broader & flexible
- Developing industry entrants to be occupationally ready
- Aligned to professional accreditation and institutions
eg iMechE
- The final decision rests with you

Trailblazers – Employer Feedback

- *We have an extremely positive experience of training our apprentices via the Trailblazer standard. **The scheme is delivering for us apprentices at a good technical level but also importantly with the right mind set, values and attitude** for our business and industry.*
- *“**We can already see high potential amongst the current apprentices in training** and we expect to see them have great future careers within our business”*
- *“We ran the Trailblazer scheme alongside the traditional “day release” route and found that the **Trailblazer apprentices developed quicker, and with more in depth knowledge** than those on the traditional pathway.*
- *The Mechatronic Trailblazer Apprentice qualification has been well thought through, a true and collaborative approach by industry leads and educational establishments. **It is delivering exactly what we want.***
- *The success of the apprenticeship program **has created a new model for the future of maintenance activities** to the extent we are now embarking on an ‘upskilling’ program for our tradesmen to make them as multi-skilled as our apprentices.*
- *The robustness of the Trailblazer is giving us **confidence in the preparedness of our apprentices to tackle complex jobs on their return to the business.***

Challenges for the market place

- Dedicated learning centres for intensive off the job training
- Staffing levels – specialist skills sets
- Capital investment in equipment
- Volume of Standards – breadth of coverage
- Recruitment and retention of engineering instructors and trainers
- Administrative challenges of funding regime for both employers and providers
- Infancy:
 - many standards in development; few ready for delivery
 - End point assessment still embryonic

What happens next?

- Apprenticeship Levy
- End Point Assessment clarification
- Download Standards from
<https://www.gov.uk/government/collections/apprenticeship-standards>
- Talk to your providers about their plans and proposition for delivery of Standards
 - Which Standards will they be delivering?
 - What timescale do they have for transition?
 - What is their proposed delivery model?
 - What is their pricing structure?

Summary

- Standards are not like for like replacements for frameworks - design and develop your delivery model by focusing on the desired outcome.
- Standards are worth more in financial value because they cost more to deliver well.
- Manage your back office processes to ensure cash flow.
- Understand and model the levy to see how apprenticeships can work for you
- Remember that you will not control EPA.
- Collaborative working can yield great results.

Questions?



6. CPD for Provider Staff

Ian Mynett, BEMA

Malcolm Rae, McBraida

CPD and other considerations in embracing Standards



- About BEMA
- Group Training Association – employer governed; surpluses re-invested

- About McBraid
- Predominantly Aerospace; privately owned

CPD and other considerations in embracing Standards



- Liaison with our employers especially SMEs has led to starting to deliver the Machining Standard
- Staff development put in place to bring/keep staff abreast with industry requirements.
- The changes in terms of kit and equipment that BEMA are sourcing
- Need for up to date information

Summary and Close

Andrew Parsons, TMUK

Evaluations please and a safe journey home