

Level 4 School Business Professional Apprenticeship

Terms and Conditions for Level 4 School Business Professional Apprenticeship (2018/19)

March 2019

Version history			
Version	Date	Reason for release / version update	Issued by
v1	January 2018	Programme start	GL
v2	October 2018	Minor amends to update sections 3, 8, 11 and 12.	GL
V2.1	Nov 2018	Updated Serco phone no. following office move	GL
V2.2	March 2018	Amended employer contribution from 10% to 5% with effect from April 2019	AT

Glossary

Phrase /abbreviation	Definition /description
Apprenticeship	On the job training that leads to a recognised qualification
DAS	Digital Apprenticeship Service (digital account for levy-paying employers)
Levy fund	Under the government's 'trailblazers' apprenticeship scheme launched in April/May 2017, employers over a certain salary threshold are required to contribute monthly to a levy fund ('levy pot') which can then be used to pay for eligible apprenticeships. The government also contributes to the employer's levy fund.
ESFA	Education & Skills Funding Agency – responsible for overseeing funding for education and skills training for.
Learning Centre	www.leadershiplearningcentre.com - The Serco Education web platform used for the Level 4 School Business Professional Apprenticeship application process and to host the programme materials.
Workshops	Face-to-face sessions (full or half days) which are included in the programme.
SBMP	School Business Management Partnership (Serco, Adfecto and ISBL). Provider of school business manager and associated training programmes.
SBM	School business management (sometimes also used as an abbreviation for 'school business manager')
SBP	School Business Professional – a generic term which includes school business managers and others in similar business and support roles in schools and academies
Programme	Course or apprenticeship programme
Units	A component of the full programme.
ILM	Institute of Leadership & Management – accreditation body (if selected)
ISBL (formerly NASBM)	Institute of School Business Leadership (formerly the National Association of School Business Management or NASBM) - professional body for school business managers [name changed from NASBM in November 2017]

Terms and Conditions

The following is a contract between the applicant (you) and The SBM Partnership (us). The School Business Manager Partnership (SBMP) is a collaboration between Serco (trading as Serco Education and part of Serco Group plc) the lead partner, Adfecto and the Institute of School Business Leadership (ISBL) to jointly deliver a suite of school business management programmes.

Please note that the Lead Partner, Serco Ltd, is on the Register of Apprenticeship Training Providers (RoATP).

The aim of this Terms and Conditions document is to provide you with information you need to know before applying for the Level 4 School Business Professional Apprenticeship provided by the SBM Partnership led by Serco Education. It explains whether you are eligible to apply, how we will deal with your application and what penalties you may or may not incur.

We recommend that you download or print a copy of this document at the beginning of the programme but it is your responsibility to ensure that you use the latest version of this document.

Note: In making an application you are agreeing to be bound by the contents of this document and policies.

You may apply to join the Level 4 School Business Professional Apprenticeship via the SBM Partnership website www.sbmpartnership.org.uk

Should you have any queries regarding the contents of this document, please e-mail sbmpartnership@serco.com

1. Eligibility for the Level 4 School Business Professional

In order to be eligible to join the programme, there are **six** specific criteria that you are required to meet. These are:

1. You must be employed as a School Business Manager (or a similar role, e.g. Finance Manager, Office Manager, Senior Administrator, Business Support Officer, Bursar, HR Manager, etc) within a state-maintained school, academy or early years setting in England. Applications are also welcome from those in the independent sector (please contact us before applying).
2. You must have the support of your line manager.
3. Your school/employer must be contributing to the Apprenticeship Levy and have a digital apprenticeship account (DAS), or if your school does not pay the apprenticeship levy, you must have confirmation that it will contribute 5% (+ VAT) of the cost of the SBP (and arrange funding the balance from the government's central 'levy pot').
4. You must be willing to work towards gaining a Level 2 English and maths qualifications (the same level as GCSE A* - C) if you don't already hold these qualifications prior to completing the Level 4 School Business Professional Apprenticeship
5. You must have a contract with your employer for a minimum of 18 months and be able to commit to 18 months of study to complete the Level 4 School Business Professional Apprenticeship (excluding end-point assessment) and to 100% attendance at workshops, coaching sessions and reviews.
6. Your workplace must be predominantly based in England if the cost of your Level 4 School Business Professional Apprenticeship is to be funded by the Apprenticeship Levy

Part-time employees are eligible to join the SBP. The length of their apprenticeship will be extended if working less than 30 hours a week (on average over the whole year) or working term-time only.

You will be asked to provide **original** certificates for your qualifications; copies are not acceptable.

Please contact us if you need to discuss your eligibility for this programme.

2. Applicant Responsibilities

You will also need to read the following documents before you apply:

- Personal Statement & Line Manager Support
- Overview for Applicants
- Frequently Asked Questions (FAQs)
- Line Manager Guidance

They are all located under Key Documents on the main Level 4 SBP web page within the www.sbmpartnership.org.uk website.

You are required to complete a **Personal Statement** in addition to the application form. This includes a requirement for your line manager (who may/may not be your headteacher) to sign a declaration supporting your application. We are unable to consider applications without a completed personal statement signed by both the applicant and line manager.

Your success on the programme will be helped considerably by the support and mentorship you will receive from your line manager as well as your programme facilitator/s and coach/assessor/s. It is essential that your line manager confirms that you will be released to attend the workshops and web conferences and given an appropriate amount of time to complete your studies.

More detailed information for your line manager can be found in the **Line Manager Guidance** document available on our main SBM partnership website www.sbmpartnership.org.uk.

Once the Personal statement has been received then you will be asked to complete a Skills Scan to help us identify your eligibility for the SBPA.

You may then be asked to participate in a phone-based interview as part of the application process. You will be given reasonable notice to attend the interview. Non-attendance will mean that your application is transferred to the next cohort when you will be asked to participate in an interview before being accepted.

If you wish to retract your application before accepting a place then you must email us immediately to do so. If you wish to apply again at a later date, you will need to complete a new application form. See also the Withdrawal section below.

3. Participant Responsibilities

Once you have been accepted onto the apprenticeship programme, you will be required to complete a detailed Apprenticeship **Agreement and Individual Learner Record (ILR)**, together with other official apprenticeship documents, before commencing the Level 4 School Business Professional Apprenticeship. The Apprenticeship Agreement must also be signed by your line manager.

Other official forms, together with the online maths and English **initial assessment**, will also need to be completed prior to the start of the apprenticeship, as well as an **Individual Learner Plan (ILP)** and a **Commitment Statement**. Please note that these documents are an ESFA requirement and we are unable to progress your apprenticeship without them.

100% attendance is required for all elements of the programme (workshops, web conferences, workplace assessments, end-point assessment, etc.). You are required to inform us a minimum of 2 weeks prior to any face-to-face workshop if you are unable to attend and to make appropriate arrangements with your facilitator/s and/or coach to cover any elements not attended due to unavoidable circumstances.

You are required to meet the deadlines set for submission of assignments, projects, coursework (includes portfolios) and to submit these in the format required by your facilitator/s. Late submission of assignments without prior arrangement may result in capping the grade for a particular assignment.

You should inform the SBM Partnership immediately of any permanent change to your normal working hours (i.e. the number of hours worked per week/month [this is an ESFA requirement]).

3.1 Confidentiality

Please respect the confidentiality of your study group. Matters discussed in study group online communities and workshops should remain private to the group and not be shared with wider audiences without prior consent.

You will be asked to undertake a range of work-based study and activities as part of the Level 4 School Business Professional Apprenticeship. This element of the programme has been designed to develop your skills and benefit your workplace. It is your responsibility to ensure that colleagues and managers in the school which is supporting you are made aware that these activities will be discussed with your coach and, if part of an assignment, will be available to your facilitator.

3.2 Time management

You are responsible for managing both your work commitments and studies as well as developing a portfolio of evidence. You must be able to commit the time to study; this may be around 6 to 8 hours per week on average (varies from individual to individual), but could be more than this at times, especially at assignment deadline periods.

You should be able to complete the work within your normal working hours although you may need to allow extra time for completing assignments. Your line manager will need to allow you time to attend off-site events, workshops and workplace assessments. A requirement of this apprenticeship is that you are afforded 20% of your working time for your apprenticeship. This time includes attendance at the mandatory events mentioned above as well as time to study and prepare a portfolio, but it also includes learning activities on the job such as meetings, work related discussions with colleagues etc.

You will be required to conduct your own research into subjects relevant to your role and will need to be able to motivate yourself and direct your own learning. The Level 4 School Business Professional Apprenticeship will be demanding and challenging. You will at times be required to explore these challenges on your own, although you will have the support of your line manager, facilitator(s), coach and other participants (peer group).

3.3 Feedback

You will be asked to complete evaluation questionnaires at different stages of the programme to help inform future development. Programme questionnaires are available for completion online. Hard copy evaluation forms for workshop sessions are normally issued at face-to-face events.

If you are approached by another party to comment on your participation in the Level 4 School Business Professional Apprenticeship, or any work you have conducted whilst on it, we ask that you advise us of this before responding.

The programme materials remain the intellectual property of the SBM Partnership and we require you not to use them or share them for anything other than your programme of study.

4. Training Provider Responsibilities

The Level 4 SBP Apprenticeship is delivered jointly by Serco Education and Adfecto.

Serco Education: Responsible for pre-application enquiries and processes, apprenticeship enrolment documentation, queries on apprenticeship funding, website registration, access to website and all funding/payment enquiries.

Adfecto: Responsible for enquiries once you are offered a place and start your studies, including queries on venue arrangements, coaching arrangements, assignment submissions, deferring or withdrawing from the programme, and accreditation.

5. Programme Funding

The cost of the Level 4 School Business Professional Apprenticeship is normally fully covered by the Apprenticeship Levy introduced in April 2017 for many schools and academies. Your school/ employer is liable for the full payment of the programme over the duration of the apprenticeship.

Levy funds cover the cost of the training only and do not include the salary of the apprentice or any travel or accommodation costs, where relevant.

The cost of the apprenticeship does not include registration with ILM (currently an additional £171 + VAT, payable separately by the school/ employer or participant).

In some cases, the school may be required to make a financial contribution if the programme costs cannot be met in full by the school's Apprenticeship Levy account (contact us for more information).

Non-levy funded schools – please contact us; at the time of writing (March 2019) it is possible to consider some applicants from non-levy funded schools but they will be required to pay an initial 5% (+ VAT) of the apprenticeship cost; the remainder is payable by the central apprentice levy fund held by the government/ESFA. It is the responsibility of the school to ensure arrangements are in place to access these funds before the start of the programme. Please contact us for further details.

Note that apprenticeship funding is managed by the Education and Skills Funding Agency (ESFA), the Government agency accountable for funding education and skills for children, young people and adults. As an apprenticeship training provider our activities have to adhere to ESFA guidance and requirements.

6. Applications from Outside England

Only employees who spend the majority of their time working in England are eligible for apprenticeship funding from the levy. Should you work outside England but are interested in the Level 4 School Business Professional Apprenticeship please contact us for further information about possible opportunities.

7. ICT Requirements

Much of the Level 4 School Business Professional Apprenticeship is conducted online, i.e. e-learning units supported by workshops, assessments, work-place learning and self-directed research and study. You should be familiar with using a computer and the internet. You will also need broadband internet access at home or at work (preferably both).

You will be given access to the relevant e-learning area on the Learning Centre, the Serco Education learning platform which is where you will access your learning materials, resources and activities.

Note that the Learning Centre is **optimised for desktop or laptop computers**. We cannot guarantee compatibility with tablets or smartphones. Please refer to our online Technical Specifications page (see separate FAQ tab on SBMP website) for further details. All studying and most assignment submissions are designed to be carried out through a desktop or laptop device.

Pop up blockers in your web browser should be either disabled or configured to allow the opening of pop ups from the Learning Centre www.leadershiplearningcentre.com

7.1 Email addresses

You must ensure that your email address is entered accurately onto the application form as all communication relevant to your application will be made this way. It is your responsibility to provide a valid and functional email address for yourself. If your email address changes, you must inform us as soon as possible via sbmpartnership@serco.com

It should be noted that some email mailboxes apply automatic filters to bulk or group e-mails. We may notify participants of course information via group emails so please add sbmpartnership@serco.com to your 'safe senders' list (or equivalent) to allow our group emails to reach you.

8. Deferrals (Break in Learning)

If, once started on a programme, or unit(s), **you find that you need to defer your place, please contact the Adfecto SBM team**, E: sbmpartnership@adfecto.org.uk in the first instance to discuss your options.

We will endeavour to arrange a deferred place but you must resume your studies **within 12 months from deferring**. You may only defer your place once and you will be required to complete a Deferral Form to formalise the process.

8.1 Grounds for deferral (break in learning)

All deferral requests will be considered on an individual basis but a deferral is likely to be favourably considered where one or more of the following circumstances apply:

- You are on maternity or long-term paternity leave
- You are seriously ill
- Family bereavement
- Significant family illness
- Change of job/school

Please note that the demands and pressure of work for events such as Ofsted inspections are not normally sufficient grounds for deferral.

8.2 Effects of a deferral (break in learning)

Should you wish to defer from the SBP the following conditions will apply:

- Materials are subject to change and the onus is placed upon the deferred participant to refresh their knowledge in updated unit areas once they resume.
- You will be unenrolled from your current e-learning and forum areas until you resume your studies
- Monthly levy fund payments are normally suspended whilst you are deferred.

8.3 Rejoining the SBP Apprenticeship programme

Participants who have been granted a deferral have a maximum of 12 months to rejoin the SBP Apprenticeship in the event that this deferral period is exceeded, participants will be automatically withdrawn and will need to reapply for the programme in the future.

Once you have formally accepted an opportunity to infill back into the programme you are unable to defer again. Should you fail to submit the associated paperwork to rejoin the programme by the set deadline, you will be withdrawn from the programme immediately.

We will always endeavour to allocate you to the nearest regional workshop location when you infill, but in some cases this may not be at the same location that you attended before; regional venue locations often vary from cohort to cohort. This also applies to those learners who enrolled onto local groups.

8.4 Requesting a deferral (or break in learning)

Should a deferral be requested, the following procedure will apply:

- You will be required to complete the formal deferral paperwork which can be obtained by contacting Adfecto.
- All requests must be completed and returned within **7 days**
- Failure to return the form within this timeframe will result in your withdrawal from the programme with immediate effect.

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- Your deferral paperwork will be processed internally and you will be notified as to whether your request has been approved within 7 days.
 - By deferring, this allows you to re-join the programme at the stage you left and so complete the qualification.

The SBMP will then contact you with opportunities to infill at the appropriate point. Once your deferral has been confirmed, your status as a participant remains as a member of your **original** intake until you have formally accepted a place to infill onto another intake.

After deferring (referred to as a 'break in learning') when you infill later on we cannot guarantee that you will join a group at the same venue location as before; different venue locations may be used for different cohort groups.

9. Withdrawal Policy (Early Exit)

9.1 Withdrawing before acceptance of a place (application withdrawal)

Should you wish to withdraw (early exit process) before your application has been accepted and registered, your application will be deleted. If you wish to apply again at a later date, a new application will need to be completed. Your new application will be considered within the next allocation process and will not be given elevated status within that process.

9.2 Withdrawing after acceptance (withdrawal from the SBP apprenticeship)

A few weeks before the start of your SBP you will receive a formal Offer Letter, sent by Adfecto via email. You must sign and return this formal offer letter to Adfecto to accept and confirm your place on the programme. The signed Acceptance Form also confirms your formal acceptance of the SBMP Level 4 SBP Apprenticeship Terms & Conditions. There will also be a separate Apprenticeship Agreement form to complete.

At this stage (i.e. once you have formally accepted a place on the programme) you may have been given access to the programme materials; groups, facilitators and learning pathways will have been set up (plus venue arrangements made).

If your circumstances change or you are experiencing serious difficulties once study activities have started, then you should discuss this with the SBMP immediately, who may be able to find an alternative course of action to withdrawing.

- A **withdrawal** (early exit) means that you wish to leave the programme / unit entirely and do not wish to re-join at a later date.
- A **deferral** (break in learning) means that you wish to leave the programme / unit temporarily and intend to resume at a later date as specified by the SBM Partnership to complete the programme/ unit.

If you still feel it is in your best interest to withdraw or defer, then you must complete and sign an Early Exit or a Break In Learning form and return it to us within 7 days. These forms are issued by the Adfecto SBM team.

9.3 Effects of withdrawing (early exit process)

- If you withdraw, membership of the Serco learning centre website will be cancelled
- If a withdrawn participant wishes to re-join the programme at any time, they will need to re-apply. If you fail to follow the deferral/withdrawal policy the SBMP has the right to contact your supporting school's headteacher for further information.
- Funding from your apprenticeship account will cease.

9.4 Enforced Withdrawals

Participants can be forced to withdraw (early exit) from the Level 4 School Business Professional Apprenticeship under the following circumstances:

- If the participant has not completed the Apprenticeship Agreement within 30 days of receipt.
- The SBM Partnership can enforce the suspension or withdrawal of a participant if the individual:
 - Is intoxicated at workshops, displays disruptive, aggressive or other inappropriate behaviour towards other participants on the Level 4 School Business Professional Apprenticeship or the wider programme delivery team.
 - Uses disruptive, aggressive or other inappropriate language or comments towards other participants, facilitators/ coach, within online forums (or within any other forms of electronic communications).
- The SBM Partnership may also withdraw a participant if the participant fails to submit required work by the agreed deadlines on more than one occasion.
- If the participant has requested a withdrawal or deferral and we do not receive the completed withdrawal/deferral form within 7 days, The SBM Partnership will assume that the participant does not wish to be involved in the Level 4 School Business Professional Apprenticeship any longer. The participant will automatically be withdrawn from the Level 4 School Business Professional Apprenticeship, even if the original request was to defer.
- If participants have agreed to infill following previous deferral and either do not attend workshops or submit work by the required deadlines.

Note: should The SBM Partnership make an enforced withdrawal the line manager will be informed of this action and the reason for doing so.

NOTE: In making an application you are agreeing to be bound by the content of these Terms and Conditions.

10. Information Security

As a user of the Learning Centre web platform www.leadershiplearningcentre.com, you are responsible for all the activities that occur under your login and password and for keeping your passwords confidential at all times. You will be required to set a security question at registration stage and this will be used to verify your details, together with appropriate checks, should you need to re-set your password.

You will be enrolled onto the relevant apprenticeship before the start date and will be unenrolled from the programme (and forum area if applicable) usually soon after the finish of the apprenticeship. You will remain registered on the learning centre site after you finish a programme.

If you defer or withdraw you will also be unenrolled from the e-learning and forum areas.

If you suspect or are aware of any breach of your account, contact the learning centre web team immediately (01452 930 300 office hours) or email sbmpartnership@serco.com

You can update your email address or password on the Serco learning centre by accessing your My Profile area on the learning centre. Required fields are shown by a red asterisk (please do not attempt to change other pre-defined settings that may be displayed under My Profile). This only updates your details on the learning centre system. Please notify the SBM Partnership separately of any email address changes as well. E: sbmpartnership@serco.com

11. Copyright

Website content and programme materials are the intellectual property of the SBM Partnership. Duplication or sharing of any content or materials with any third parties not directly involved in the programmes or services provided by the SBM Partnership or its partners is prohibited. See also the online Copyright Notice for further details (www.leadershiplearningcentre.com).

12. Personal Data

We will store your personal details securely at all times and keep them on file for the duration of the Level 4 School Business Professional Apprenticeship and for purposes of communicating any further relevant programmes to you afterwards.

In addition, your preferred email address and phone number will be shared with the ILM and your facilitator(s) and coach for academic purposes only so that they can contact you regarding the Level 4 School Business Professional Apprenticeship activities.

12.1 Data Protection

We have legal obligations, under the current Data Protection legislation, to collect any personal information that you provide to us fairly. The SBM Partnership is fully compliant with the Data Protection Act (2018).

We do not pass on any personal data or contact details to any third parties for marketing purposes.

The SBM Partnership will store your personal details securely at all times and use them for monitoring recruitment information and site usage, for administering and delivering apprenticeships, for ESFA reporting purposes in order to draw on the Apprenticeship Levy (once you have formally accepted a place on the Level 4 School Business Professional Apprenticeship), to pass on to the ILM for accreditation (if selected), and for occasional, relevant communications concerning associated courses we may offer. You can opt out of this last process by emailing us once registered on the Level 4 School Business Professional Apprenticeship.

Academic records will be stored by the SBM Partnership for as long as records are deemed necessary for Levy funding or academic purposes (such as requests for lost certificates or verification of historic qualifications, etc.), but no longer than 10 years from the end of your studies.

13. Completion

Once you have successfully completed all of the academic units, the work-based project and the portfolio of evidence, you will be invited to attend an end-point assessment day with an external assessor. Upon successful completion of the final assessment day you will receive your Institute for Apprenticeships (IFA) certificate for the Level 4 School Business Professional and, for those who had selected the option at the start, the Level 4 Diploma in SBM.

All details and policies contained herein may from time to time be subject to change without notice as part of our normal programme and policy review process and therefore they should be regularly checked. The continued use of the site or a programme activity after a change has been made is your acceptance of the change.

Latest programme details are available on the main the main SBM Partnership website

www.sbmpartnership.org.uk

We recommend that you download or print a copy of this document together with the relevant programme Overview, FAQ (frequently asked questions), Line Manager Guidance and Personal Statement documents. All are available online.

Enquiries to:

Serco Education – pre-application, pre-induction forms, website registration and apprenticeship funding/payment enquiries: sbmpartnership@serco.com T: 01452 930 300 (office hours),

or

Adfecto – queries as you progress through the programme, e.g. study materials, assignment submissions, coaching arrangements, deferring, rejoining, etc):

sbpartnership@adfecto.org.uk T: 01242 220684 (office hours)