

# **School Business Professional Apprenticeship (SBPA)**

## **Terms and Conditions (June 2024)**

## 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)
ESFA	Education & Skills Funding Agency – responsible for overseeing funding for education and skills training for.
ILM	Institute of Leadership & Management – accreditation body (if selected)
ISBL	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]
Learning Centre	<a href="http://www.leadershiplearningcentre.com">www.leadershiplearningcentre.com</a> - The Serco STS web platform used to host the programme materials.
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.
PICs	The Serco STS web platform used for the application and onboarding process. Also used by apprentices use throughout their studies to upload evidence against the SBPA Standard.
Programme	Course or apprenticeship programme
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
Unit	A component of the full programme.
Workshops	Face-to-face sessions which are included in the programme.

## Terms and Conditions

The aim of this document is to provide you with information you need before applying for the Level 4 School Business Professional Apprenticeship provided by Serco Skills & Training Services (STS). It explains whether you are eligible to apply, how we will deal with your application, what the responsibilities are of each party, 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.**

Should you have any queries regarding the contents of this document, please e-mail [learnerrecruitment@serco.com](mailto:learnerrecruitment@serco.com).

### 1 – Eligibility for the Level 4 School Business Professional Apprenticeship

To be eligible to join the programme, an applicant must:

1. Have a valid and eligible residency status including:

UK nationals who have been ordinarily resident in the UK, the British Overseas Territories, the crown dependencies (the Channel Islands or the Isle of Man) for at least 3 years before the apprenticeship.

2. Right of abode in the UK – this is a status under UK immigration law that gives an unrestricted right to live in the UK.

Individuals with the right of abode are eligible for funding if they have been ordinarily resident in the UK, the British Overseas Territories, the crown dependencies (the Channel Islands or the Isle of Man) for at least 3 years before the apprenticeship.

3. UK nationals who have been living in the EEA prior to their apprenticeship are eligible if they:
  - have been ordinarily resident in the EEA for at least the previous 3 years before starting the apprenticeship; or
  - have been ordinarily resident in a combination of the UK and the EEA for at least the previous 3 years before starting the apprenticeship
4. EEA nationals in the UK are eligible for funding if they are:
  - Irish nationals who have been ordinarily resident in the UK, Ireland or the EEA for at least the previous three years before the start of the apprenticeship.
  - Any other EEA national who has obtained either pre-settled or settled status under the EU Settlement Scheme and have been ordinarily resident in the EEA, Gibraltar or the UK for at least the previous three years before the start of the apprenticeship
5. The applicant must be working in a suitable role (school business manager, school finance officer, senior administrator or other business support role within education) and must have an employment contract for at least the duration of the apprenticeship

6. Your workplace must be predominantly based in England if the cost of your apprenticeship is to be funded by the apprenticeship levy.

7. Part-time employees are eligible to join the SBPA

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

## 2 – ESFA Compliance

To ensure compliance with ESFA funding roles, you must complete and return all documents required for registration in a timely manner and prior to the start of your apprenticeship programme.

## 3- Participant Responsibilities

Once you have been accepted onto the apprenticeship programme, you will be required to sign an **Apprenticeship Agreement** and **Training Plan** prior to the programme start date. Both documents must also be signed by your line manager. Please note that these documents are an ESFA requirement and we are unable to progress your apprenticeship without them.

Maths and English **initial and diagnostic assessments** will also need to be completed prior to the start of the apprenticeship.

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 tutor/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 tutor/s.

You should inform Serco immediately of any permanent change in your circumstances (i.e. change of employer, change of contact details etc.) [this is an ESFA requirement].

## 4– Confidentiality

The confidentiality of study groups must be respected. Matters discussed in study group online communities and workshops must remain private to the group and not shared with wider audiences without prior consent.

It is your responsibility to ensure that colleagues and managers in your school are aware that activities undertaken as part of this apprenticeship will be discussed with your coach and, if part of an assignment, will be available to your tutor.

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 Serco and we require you not to use them or share them for anything other than your programme of study.

## 5 - 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 **6 hours a week 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, tutor(s), coach and other participants (peer group).

## 6 - 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.

## 7- Programme Funding

The cost of the Level 4 School Business Professional Apprenticeship is normally fully covered by the Apprenticeship Levy introduced in 2017 for many employers (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 (contact [learnerrecruitment@serco.com](mailto:learnerrecruitment@serco.com)) for the latest pricing.

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. A revised scheme for non-levy employers was introduced in January 2020. Search online for *Apprenticeship funding for employers who do not pay the apprenticeship levy*.

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 must adhere to ESFA guidance and requirements.

## **8 - Applications from outside England**

Only employees who spend most 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.

## **9 – ICT requirements**

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 the Leadership Learning Centre 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](http://www.leadershiplearningcentre.com).

## **10 - Email addresses**

A valid and functional email address must be provided to allow communication relevant to your application / programme. If your email address changes, you must inform us as soon as possible, either via [learnerrecruitment@serco.com](mailto:learnerrecruitment@serco.com) (if you are still at application stage when your email address changes) or via [spba@serco.com](mailto:spba@serco.com) (if you are an active learner when your email address changes).

You may wish to add both [learnerrecruitment@serco.com](mailto:learnerrecruitment@serco.com) and [spba@serco.com](mailto:spba@serco.com) to your "safe senders" list (or equivalent) to ensure our emails reach you.

## **11- Break in Learning (Deferral)**

Should you find that you are unable to continue with your SBPA studies or you are struggling to meet deadlines, please contact [spba@serco.com](mailto:spba@serco.com) in the first instance to discuss your options. You should also discuss your situation with your coach.

A break in learning may be taken for a minimum period of four weeks to a maximum of twelve months and will require the agreement of the employer.

### **11.1 - Grounds for break in learning (deferral)**

All break in learning/deferral requests will be considered by us on an individual basis but a break in learning (BIL) 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

Please note that a change of employer, the demands and pressure of work are not normally sufficient grounds for a break in learning.

### **11.2 – Effects of a Break in Learning (BiL)**

- 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.
- Access to all learning materials will be suspended for the duration of your break in learning.
- Monthly levy fund payments must be suspended by the employer whilst you are deferred.

### **11.3 – Requesting a Break in Learning (BiL)**

You will be required to complete the formal break in learning paperwork which can be obtained by contacting [sbpa@serco.com](mailto:sbpa@serco.com).

By deferring, this allows you to re-join the programme at the stage you left and so complete the qualification.

### **11.4 – Re-joining the SBP Apprenticeship programme**

- Should a break in learning exceeds the maximum twelve months, the participant will be automatically withdrawn and will need to reapply for the programme in the future.
- Participants must re-join the apprenticeship at the point they went on their break in learning. Time spent on a break in learning will be added to the duration of the apprenticeship.
- Funded payments will resume when the apprentice returns to studies.
- We cannot guarantee a group at the same venue location as before. Different venue locations may be used for different cohort groups.

## **12- Early Exit (Withdrawal)**

### **12.1 – Withdrawing pre-registration**

If you wish to retract your application before you are registered, then you must email us immediately to do so. Your application will be deleted. If you wish to apply again at a later date, you will need to complete a new application form. Your new application will be considered within the next allocation process and will not be given elevated status.

## **12.2 – Withdrawing post-registration**

Should you wish to withdraw once study activities have started, you should discuss this with Serco immediately who may be able to find an alternative course of action.

'An Early Exit (withdrawal) means that you wish to leave the programme / unit entirely and do not wish to re-join at a later date.

Apprentice withdrawal from the programme must be agreed by the employer.

## **12.3 – Effects of Early Exit process**

- Access to the Serco Learning Centre website will be cancelled.
- It is your responsibility to notify your employer of your early exit so they can stop levy payments.
- You may reapply for the apprenticeship at a later date.

## **12.4 - Enforced Withdrawals/Early Exits**

Serco 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, tutors/ coach, within online forums (or within any other forms of electronic communications).
- Fails to submit required work on repeated occasions.
- Has not engaged with the programme and is not communicating/corresponding with Serco for a period in excess of six weeks

Should Serco make an enforced Early Exit/ Withdrawal, the employer will be informed of this action and the reason for doing so.

## **13 – Information Security**

As a user of the Learning Centre web platform [www.leadershiplearningcentre.com](http://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 reset your password.

If you suspect or are aware of any breach of your account, contact the learning centre web team immediately or email [sbpa@serco.com](mailto:sbpa@serco.com).



## 14 - Copyright

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

## 15 – 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. Please refer to our online Privacy Policy ([Serco Employment, Skills and Enterprise - privacy policy \(serco-ese.com\)](http://Serco Employment, Skills and Enterprise - privacy policy (serco-ese.com)))

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

### 15.1 - Data Protection

We have legal obligations, under the current Data Protection legislation, to collect any personal information that you provide to us fairly.

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

Serco 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, 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 Serco 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.

Latest programme details are available on the main the main Serco STS website:

[Serco Education | School Business Professional Apprenticeship \(serco-ese.com\)](http://Serco Education | School Business Professional Apprenticeship (serco-ese.com))

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

### Enquiries to:

Serco SBPA Team [learnerrecruitment@serco.com](mailto:learnerrecruitment@serco.com)

<b>Version history</b>			
<b>Version</b>	<b>Date</b>	<b>Reason for release / version update</b>	<b>Issued by</b>
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 2019	Amended employer contribution from 10% to 5% with effect from April 2019	AT
v2.3	June 2019	Updated branding and ILM pricing for 2019-20; updated email addresses and URLs.	GL
V2.4	Oct 2019	Minor amends and updates to new contact details	GL
V2.5	Oct 2019	Update to revised scheme for non-levy employers (section 5)	GL
V2.6	April 2022	Update	AP
V2.7	March 2024	Update	EMJ