

Provider Readiness Report

PRACTICAL INSIGHTS AND GUIDANCE

FOR DELIVERING APPRENTICESHIP STANDARDS



Chartered Manager

Leading Partner:



Strategic Partners:



Provider Readiness Report – Chartered Manager (Level 6)

Introduction:

Provider Readiness Reports are delivery guidance documents for an apprenticeship standard. They are created by training providers (including colleges, independent training providers, higher education institutions and others). The reports provide practical insights and guidance to help with planning for delivery and in negotiations with employers. They will help providers make decisions about the commitment of time and other resources required to train apprentices to meet the requirements of the new standards.

Standard	Link to Standard
Assessment Plan (end point)	Link to Assessment Plan
Employers involved with development of standard for Chartered Manager Degree Apprenticeship	Led by organisations including: Serco; CMI; Acivico; Agillisys; Anglo Educational; Balfour Beatty; Barchester Healthcare; Barclays Bank; Boots UK Ltd; BBC; Civil Service; Codegent; Co-op; Evolution Partnership; HMRC; Kinnerton Confectionery; NISA Retail Limited; One Stop; Opus Building Services; Sainsbury's; Santander UK plc; Umi Digital/Anglo Educational; and Virgin Media.
SASE Overlap	Higher Apprenticeship in Management-Level 4 & 5 (England)
Mandatory Qualification(s) on standard	Successful apprentices must achieve a degree in management and business [either BA (Hons); BSc (Hons) or BBA (Hons)] and full chartered status and membership of the CMI. English and maths - English and maths will be required to be demonstrated at a minimum of Level 2.
Recommended Qualification(s) suggested by trailblazer group in assessment plan	None
Maximum Core Government Contribution (CGC), subject to employer contribution (15/16 & 16/17)	£18,000 maximum CGC, subject to employer £9,000 contribution. The price of on-programme training and end-point assessment is subject to employer/provider negotiation and may be higher or lower than combined values above; where higher the maximum CGC remains the same and the employer would need to pay the difference in full. The employer may be eligible for incentive payments, which they can use as they wish. See current funding rules for further guidance.
Anticipated Volume	High
Level	6

<p>English and Maths Requirements</p>	<p>For Level 3 to 7 apprenticeships, apprentices must achieve Level 2 English and maths prior to taking their end-point assessment.</p> <p>Apprentices must start English and maths at Level 2, unless the provider has conducted a formal, recognised assessment that demonstrates they need to study at Level 1 first in order to successfully achieve their Level 2.</p> <p>SFA provides a flat rate for English and maths up to Level 2 as part of an approved apprenticeship standard. Employers will not need to make an employer contribution.</p> <p>See current funding rules for further guidance.</p>
<p>End Point Assessment Methods</p>	<ul style="list-style-type: none"> • Portfolio • Project • Presentation and Interview

Supporting information and Glossary of Terms

Assessment Role	Notes
Employer	Supports the apprentice in the workplace, may provide training, coaching or mentoring.
Training Provider	<p>Employers wishing to access funding must appoint an SFA approved lead provider via the Register of Training Organisations (ROTO) https://www.gov.uk/government/publications/register-of-training-organisations</p> <p>Employers may choose to engage with one or more providers to deliver the on programme training.</p> <p>Providers wishing to deliver on-programme delivery must registered and be approved on the, Register of Apprenticeship Training Providers (RoATP). Also providers who wish to deliver to employers without a digital account, must register and be approved on the Invitation to Tender (ITT). Please follow the link for further information. https://www.gov.uk/government/collections/register-of-apprenticeship-training-providers</p>
End Point Assessment Organisation	<p>Employers must select an end point assessment organisation from the SFA Register of Apprentice Assessment Organisations (RoAAO), approved to deliver this particular standard: https://www.gov.uk/government/publications/register-of-apprentice-assessment-organisations</p>
Local Enterprise Partnership (LEP)	Voluntary partnerships between local authorities and businesses set up to help determine local economic and skills priorities and lead economic growth and job creation.

Term	General Definition within Trailblazers
On-Programme	This is the period from start until the end-point assessment gateway is met. Apprentices require a minimum period of 12 months on-programme training, with 20% off-the-job training prior to taking the end-point assessment to meet funding eligibility requirements. It will include training to develop the skills, knowledge and behaviours detailed on the standard and completion of any mandated qualifications, including English and maths where required. Preparation for the end-point assessment should be completed in this phase. This is the area of significant interest for apprenticeship training providers.
Gateway	Any requirements that must be completed/achieved as a pre-requisite to undertaking the end-point assessment are termed the gateway. For example English and maths minimum requirements. The gateway components are therefore the key outputs of the on-programme training period.

Chartered Manager (CMgr)	Chartered Manager is awarded only by the Chartered Management Institute (CMI). It is recognised throughout the public and private sectors and across all management disciplines but it is not a licence to practise.
Integrated Degree	The degree programme covers all aspects of the standard including knowledge, skills and behaviours; there is no separate assessment of occupational competence.
Validation / Revalidation	The process of internally and externally quality assuring provision.
Curriculum mapping	The process of identifying gaps in the assessment outcomes, module outcomes and curriculum content which are covered by the knowledge input and work-based assessment for the degree programme.
Trainer	The term 'trainer' is commonly used in relation to roles within the on-programme period. A trainer may be appointed by the employer or training providers to deliver some or all parts of the on-programme phase of training. This includes delivering any mandated qualifications, preparation for the end-point assessment and all gateway components. The trainer has no status within the end-point assessment, unless specifically referenced and approved within the assessment plan (for example being a signatory to a portfolio or a panel interview).
Independent Assessor	Individuals involved in administering and delivering the end-point assessment are commonly termed the assessor, end-point assessor or independent assessor and must be appointed by an approved end point assessment organisation.

Themes	Considerations / Implications for delivery	Resources
<p>On programme components/ Infrastructure:</p> <p><i>the drive towards effective competence-based and situational training</i></p>	<p>The delivery will cover learning outcomes related to knowledge, skills and behaviour and recognise that achieving the Chartered Manager Degree Apprenticeship (CMDA) will require significant evidence of ability to deliver activities in the workplace; therefore an entirely academically delivered programme will not meet the required outcomes of the CMDA.</p> <p>Existing programmes - where existing programmes (such as corporate or professional degree level programmes) are in place, the curriculum, including the degree programme, will need to be mapped against the learning outcomes and assessment criteria for the CMDA. Any gaps will need to be identified and addressed jointly between the lead provider and the employer.</p> <p>New programmes - where no existing programme is in place it is advisable that during programme development the curriculum is course mapped to the CMDA standard and careful attention made to the learning or qualification route chosen to ensure Chartered Manager status is secured from CMI. There is no requirement for a CMI specific qualification or programme to be followed to achieve Chartered Manager recognition.</p> <p>In some cases, other awarding organisation accredited qualifications in leadership and management can be embedded in the integrated degree course. Certificates and diplomas may be achieved by the learner at the end of years one, two and three equivalents to the level of HE achievement. In this way, dual accreditation can be achieved.</p> <p>In cases where a new degree is developed, employers will be able to work with universities to shape the overall degree programme and all aspects of their apprentice's training. While all mandatory elements of the standard need to be achieved there may be flexibility in the modules offered within the degree depending on how the university / HEI has designed the degree following negotiation with the employer and apprentice.</p> <p>Chartered Manager status can be fulfilled through two routes:</p> <p>a) Exemption route - Programme mapping to the CMI Level 5 Diploma in Management and Leadership (leading to dual accreditation – an associated payment for programme approval is required). In this route the provider is approved to assess for Chartered Manager through accreditation by CMI and the route to assessment for professional recognition is automatically done once the CMI Level 5 Diploma is achieved by the apprentice.</p>	<p>Future Apprenticeship Toolkit</p> <ol style="list-style-type: none"> i. The Standard ii. The Assessment Plan iii. CMI guidance for HEIs http://www.managers.org.uk/~media/Files/CMDA%20Provider%20Guidance%20-%20FINAL%20Nov%202015.pdf iv. SFA combined funding rules for apprenticeship standards

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	<p>b) Qualified Route – Written submission with telephone interview using the submission template available at iii. This involves payment of a fee to the CMI to assess for Chartered Manager status the cost of which should be met within the overall apprenticeship price, agreed with the employer. Other Awarding Organisation/Body schemes of work and qualifications can be followed and achieved.</p> <p>The achievement of the degree and Chartered Manager status are the gateway to allow access to the end-point assessment for the CMDA. There may be a period or gap between completion of the gateway requirements (for example, at the end of Year 3) and the point at which end assessment takes place (in some cases, at the end of Year 4). The length of the programme should be discussed and agreed between providers and employers. Delivery is likely to be undertaken over 36 months to 54 months to enable the apprentice to undertake 360 credits of learning in addition to completing the assessment for Chartered Manager status and the end-point assessment. In some instances the apprentice may be equipped to undertake the end-point assessment immediately following completion of the degree and gaining chartered manager status but for others they may need longer to build additional evidence and compile their portfolio.</p> <p>CMDA (including end-point assessment):</p> <p>Following the gateway process apprentices will progress to end-point assessment where they will present a portfolio of evidence, work-based synoptic project and undertake an interview to demonstrate their knowledge skills and behaviour to a panel comprising of representatives from the employer, provider and the independent assessment organisation.</p> <p>Lead providers are responsible for ensuring apprentices collate the necessary portfolio of evidence to demonstrate achievement of the standard at the end-point assessment.</p> <p>Skills Funding Agency compliance:</p> <p>The lead provider must be registered on the Skills Funding Agency (SFA) Register of Training Organisations (ROTO) and have an apprenticeship contract. This will enable the provider to deliver nationally recognised apprenticeship standards. It is permissible for providers, including HEI's, FE colleges and private training organisations to work in partnership to deliver the standard.</p>	

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	<p>The current system depends on employers contributing towards the costs of delivery through direct payments to the provider. The SFA will then pay £2 for every £1 paid by the employer up to the maximum government contribution. The CMDA has been awarded cap 6 within the SFA funding tables (available on page 32 of iv), therefore the maximum government (SFA) contribution is £18,000 (excluding incentive payments).</p> <p>The lead provider is required to provide evidence of employer payments to enable them to receive funding.</p> <p>It is anticipated that from Academic Year 2017-18 funding will be routed directly to employers. The impact of this and the apprenticeship levy voucher system are still to be clarified.</p> <p>Organisational Infrastructure:</p> <p>Since the processes, procedures, rules and regulations are different to those which many providers (particularly universities) are familiar with, it is suggested that a cross-functional group is established by the organisation / institution to ensure all relevant elements are considered e.g. legal, funding, admissions, data, administration support, marketing, registry, faculties and finance.</p>	
Delivery:	<p>The delivery of the programme will vary according to the experience and expertise of the provider and the requirements of the employers and apprentices. In some instances this will be day or block release, in others blended learning or distance learning will be applicable.</p> <p>Traditional roll-on, roll-off models of delivery may be applicable depending on the flexibility of the organisation and the numbers engaged with the programme.</p> <p>Accredited Prior Learning (APL) and/or advanced standing should be considered within the context of meeting the standard and an organisation's processes and systems. This may affect the exemption route referred to above. If this route is followed a discussion should be undertaken with the CMI.</p> <p>The minimum requirement for all apprenticeships is 12 months. However the CMDA is typically a 4 year programme. Some providers and employers will negotiate completion in a shorter period of time depending on individual experience and workplace opportunities.</p> <p>In addition to meeting the minimum requirements of Chartered Manager status and the CMDA, the provider and employer may agree additional content according to employer</p>	

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	<p>and apprentices' needs, where additional learning is required to be eligible for funding this additional content must help the apprentice to develop the skills, knowledge and behaviours on the standard.</p> <p>Demonstration of elements of the knowledge, skills and behaviours on the CMDA may not be fully achieved through the degree programme. Any gaps should be clearly identified and highlighted to the employer and apprentice to ensure they can put the necessary resources and opportunities in place in the workplace to enable the apprentice to meet the requirements of the end-point assessment. However lead providers are responsible for ensuring apprentices collate the necessary portfolio of evidence to demonstrate achievement of the standard at the end-point assessment.</p> <p>The achievement of the end-point assessment may be immediately following the completion of the gateway or it may be at an agreed point in time after this to allow the learner to generate additional workplace evidence and compile their portfolio.</p> <p>Quarterly reviews between the provider and employer should take place throughout the programme, with a formal annual review of progress. Ongoing reviews with the apprentice throughout the programme up to the end-point assessment are desirable.</p>	
<p>Resources:</p> <p><i>materials/ resources/ equipment</i></p>	<p>The lead provider should make a decision on the mechanism by which they will support the development of a portfolio to meet the end-point assessment. This could be via an e-portfolio/reflective portfolio system.</p> <p>The provider should ensure that the employer understands its obligation to support the apprentice and has the necessary resources to do this.</p> <p>There is no specialist equipment prescribed as the employer setting dictates the specifics of assessment, except there is an expectation that all assessment tasks are grounded in the workplace. This means the employer must ensure that a fully grounded and rounded learning experience is maximised for the apprentice to allow competency to be achieved and demonstrated. Rotation of the apprentice around all business functions is one way to achieve this prior to any specialisation.</p>	

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<p>Staffing:</p> <p><i>Staff qualifications and skills needed</i></p>	<p>In some organisations where work-based learning is undertaken no major changes to the delivery and resourcing of programmes will be required. However, where organisations take a more theoretical approach to teaching and learning it will be expected that a more integrated, work-based approach (including learning from the work environment) will be taken to the delivery and assessment of the programme. This may require existing staff to develop new methods of delivery and assessment and/or may involve appointment of new staff. Staff should be suitably qualified (determined by the provider) to deliver degree level learning in leadership and management.</p> <p>In some instances, partnering with sub-contracting providers could provide a solution to these requirements. It should be noted that where third-party providers are commissioned as sub-contractors for delivery, they must be registered on the SFA's ROTO (if the sum of the sub-contract is greater than £100,000). In addition to registration on the ROTO an external audit of quality processes is required in this situation (contracts >£100,000 see iv).</p> <p>A significant level of relationship management will be required to ensure successful completion of the CMDA. This relationship management role will ensure the provider, CMI, employer and apprentice are working together to ensure the right environment and opportunities are provided to enable the apprentice to fulfil the requirements of the CMDA.</p>	
<p>Costing:</p> <p><i>costs associated with the resources</i></p>	<p>Finances (SFA/ Employer / CMI):</p> <p>The cost of the apprenticeship programme is negotiated between the lead provider and the employer. A government contribution subject to employer contribution is available up to a cap and any costs over and above the maximum cap will need to be fully recovered from the employer at full cost.</p> <p>Providers should calculate the costs of teaching and resources, management of the relationships between the apprentice, the employer and the provider. In addition CMI fees should be included. The costs of teaching will depend upon the calculation method which the provider uses, this will usually include the costs of staffing to develop, deliver and mark work.</p> <p>Providers should be aware that the caprice agreed is for delivery of the full CMDA including the end-point assessment. Where gaps exist between the provision delivered by the degree provider it could be expected that the employer may negotiate a lower fee to</p>	

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	<p>enable them to provide the recourses and opportunities to fill the gaps. This will be more likely once the funding is routed directly to employers.</p> <p>Additional costs for enabling the apprentice to fulfil the requirements to become a chartered manager (gain their CMI status) or end-point assessment may be incurred by the employer. CMI membership costs are outlined in page 39 of iii above.</p>	
<p>Marketing / Communication:</p> <p><i>promoting the offer to Employers/ Apprentices</i></p>	<p>Information on the standard is available through the apprenticeship website (see i). Information for providers is available through the CMI website and through the CMI published HEI guidance document (see iii). In addition, individual providers will have marketing materials for their provision on their own provider website.</p> <p>Individual providers will determine their routes to market. It is recognised that a number of third-party organisations such as the Local Enterprise Partnerships (LEPs) and Local Authorities (LAs) may provide support to accessing the market as a shared agenda to deliver higher skills within their localities.</p> <p>The CMI are also a route to market; providers can be registered as a CMDA provider with the CMI.</p> <p>In addition collaboration with existing providers of learning at the level below degree level, such as private training organisations and FE colleges may bring additional opportunities and routes to market where progression to managerial, senior and professional occupational job roles is demanded by employers.</p> <p>Information for apprentices is available from the above sources as well as the National Apprenticeship Service vacancies website and other vacancy websites. Apprenticeships are jobs and so employers are ultimately responsible for recruitment. Both employers and universities will need to be satisfied the applicant meets their respective requirements. It is likely that some employers and universities will therefore do recruitment jointly.</p> <p>Recently Nicky Morgan (Secretary of State for Education) has announced plans for legislation to compel schools to provide vocational information, advice and guidance alongside more traditional further educational study and work. http://www.bbc.co.uk/news/education-35401365</p> <p>From an initial marketing and communications perspective; providers are most likely to have a direct relationship with the employer rather than the prospective apprentice. This is because apprentices need to have an apprenticeship job-role before enrolling on the programme.</p>	<p>BIS/NAS materials</p> <p>v. CMI information on CMDA http://www.managers.org.uk/degree-apprenticeships</p>

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<p>End point Assessment:</p>	<p>The end-point assessment will consist of a panel comprising representatives from the employer, provider and an independent assessor who will review the portfolio of evidence, the work-based project and conduct an individual interview. The work-based project forms part of the degree and is also assessed separately for this end-point assessment. The project forms part of the final mark for the end-point assessment.</p> <p>At the time of writing there are no organisations identified for the CMDA on the RoAAO (see vii). It should be noted that the end-point assessment organisation should be independent of the employer and the provider. It is expected that additional organisations will be approved to conduct the end-point assessment to enable employers to choose the most appropriate organisation.</p> <p>Where the CMI are chosen as the end-point assessor and are also assessing the Chartered Manager status (via the qualified route - see infrastructure section above) the process will be combined.</p> <p>The roles and responsibilities of the provider, employer and CMI are outlined in the guidance for HEIs available at iii (section 4 – page 22). This document also outlines the guidance on grades for the end-point assessment (section 2.7 pages 17-18).</p> <p>The CMDA will be given a pass, merit, distinction or fail grade by the end-assessment panel.</p> <p>This grading is entirely separate to the degree classification awarded by the university.</p>	<p>vi. RoAAO</p>
<p>Managing relationships with Employer and Apprentices:</p> <p><i>Employer/ Provider/ Apprentice Contracts</i></p>	<p>The lead provider will need to have close working relationships with the employer to ensure delivery meets their requirements and the requirements articulated in the SFA funding rules available at iv.</p> <p>Providers will also need to maintain a relationship with the CMI and the end-point assessment organisation (if this is not the CMI). Apprentices must be registered as CMI affiliate members within 6 weeks of registering on the CMDA apprenticeship; this should be within 6 weeks of creating the Individualised Learner Record (ILR).</p> <p>The lead provider has a duty of care in respect of apprentices learning under their usual student charter.</p> <p>The lead provider is responsible for ensuring the employer pays the apprentice and signs the necessary contracts (this is through the Apprentice Agreement). The three-way apprentice agreement clearly states the responsibilities of each party. Further guidance on apprentice agreements is included in iv above.</p>	

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<p>Sub-Contracting relationships:</p> <p><i>Lead provider role and potential for collaboration on apprenticeship delivery</i></p>	<p>All lead providers should be registered on the Skills Funding Agency (SFA) Register of Training Organisations (ROTO).</p> <p>Lead providers should have read the SFA funding rules (available at iv) and understand their responsibilities in relation to these rules.</p> <p>The lead provider and the independent assessment organisation must have a deep and critical stake in assessment and the success of the apprentice in a high-quality experience.</p> <p>Lead providers may give employers the choice as to whether they receive the services of a trainer employed by the lead provider or that of a sub-contractor (where applicable) – thus raising the quality of openness and trust in their relationship.</p> <p>Lead providers will ensure that they have Service Level Agreements (SLAs) in place with sub-contractors (where applicable) and that the same quality checks and measures will need to deliver the apprentice successfully to end point assessment.</p> <p>Sub-contractors / partner providers will need to work seamlessly with the lead provider to ensure they fully understand the funding guidance and requirements of delivering and managing to the standard.</p> <p>There is a conscious move to increasing the quality of delivery, quality assurance and accountability. It will be important to look to current contracting relationships and consider these in the light of a more commercial environment and the need for stronger employer relationships.</p>	
<p>Progression</p>	<p>There is currently no Level 7 standard for progression; however individual providers may have Level 7 qualifications which are relevant as progression routes depending on the industry and nature of the occupational job role.</p>	
<p>Market Shaping</p>	<p>Key drivers and determinants are:</p> <ol style="list-style-type: none"> 1. Apprenticeship levy - a new experience that employers (generally outside of construction) are responding to for the first time so will need careful consideration when initially engaging and negotiating 2. SME market - not suited to bespoke degrees so allows the provider to segment and target business by size: large, mid-level, small and micro and will need specific planning and approach 	

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	<p>3. Target audience – could range from school leavers and existing Level 3 apprentices through to experienced managers without an existing Level 6 qualification in a relevant discipline – so will potentially require a differing approach to the apprentice experience</p>	
<p>Quality</p>	<p>Quality assurance for the degree programme will be through the QAA regulations under which the providers of degree programmes currently operate.</p> <p>Individual providers will have their own internal quality assurance processes and systems to manage the provision related to the CMDA and /or Ofsted. If the institution is familiar with standard degree provision only (i.e. full-time/part-time undergraduate) and is therefore new to work-based provision they will need to consider how the CMDA and degree provision will be quality assured.</p> <p>Where sub-contracting takes place the lead provider is responsible for the quality assurance of all delivery.</p> <p>The voice of the learner and employer should be gathered through a variety of methods including regular review meetings, the National Student Survey (every university in the UK takes part, as do many colleges, and is overseen by the UK’s higher education funding bodies) and other relevant methods.</p>	