
Transfers: a step by step walkthrough

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Transfers

- In response to employer demand
- Adds further flexibility to apprenticeship levy
- Employers can transfer up to 25% from April 2019 (previously 10%)
- Opportunity for larger and smaller employers to work together
- Fund any organisation

Transfers benefits

If employers have funds to transfer

- Direct funds in a way that benefits their business
- Support their sector, supply chain or a local agenda
- Transfer funds to multiple employers

If an employer is receiving a transfer

- Training for their apprenticeship will be paid in full
- Get help and support from the transferring employer



Identify an employer

- Sending employer: find an employer(s) to transfer funds to, to pay for apprenticeships
- Agree details of the apprenticeship
 - apprenticeship standard
 - number of apprentices
 - apprenticeship duration
 - cost
- Understand the rules and obligations regarding transfers

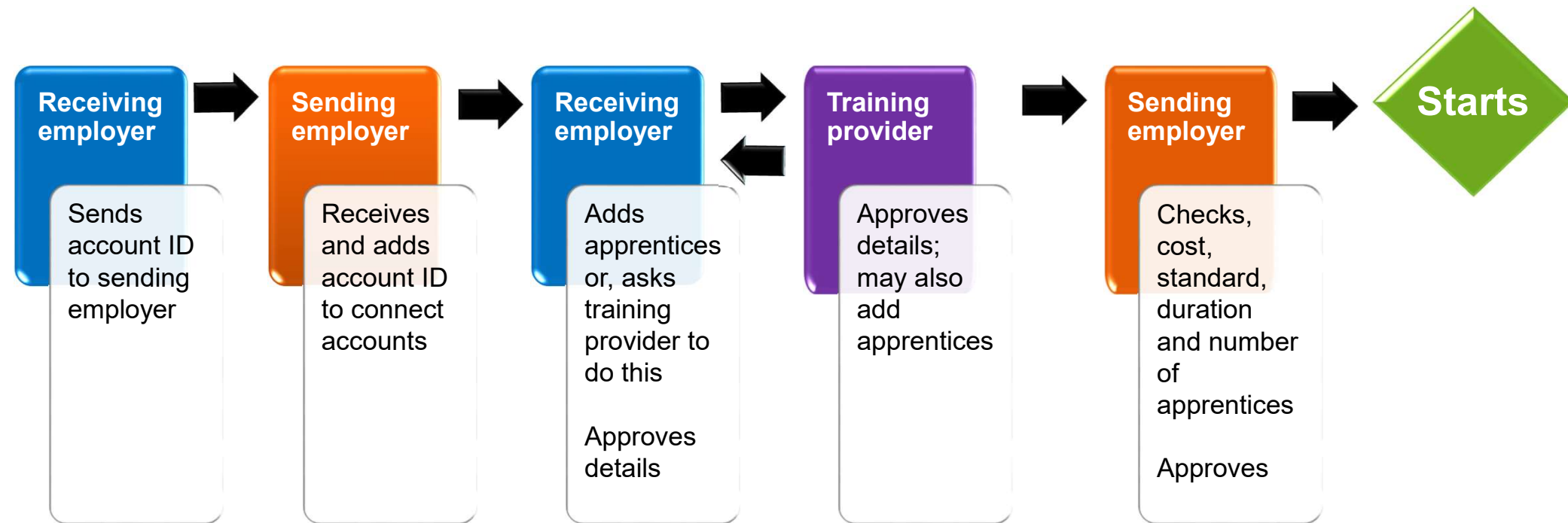


Apprenticeship service account

- Set up account, enabling employers to:
 - connect with each other - the **transferring employer** must be the one that initiates the connection
 - add the apprentice details
 - confirm the transfer
 - view transfer transactions
- Provide support



Connecting accounts and add apprentices



Myth busting

- A transfer can only be used to pay for another employer's apprenticeships.
- It will be an exact and agreed amount
- Employers cannot transfer 25% as a lump sum or a gift
- Employers can make a transfer to any other employer
- At any one time, an employer can only be a sender or a receiver – they cannot do both at the same time.
- Employers can make transfers to multiple employers



Questions



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Transfers: A provider's experience

Crescens George
Chief Executive Officer
Wiser Academy



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Training Provider case study: Crescens George, Wiser Academy



- Supporting small businesses with starting Apprenticeships (cohort waiting period)
- Submitted business case on behalf of a group similar, small businesses to a large levy employer
- Packaged Apprenticeships as a training programme – to keep the process simple
- Employer set-up on the digital Apprenticeships portal (liaising with key stakeholders)
- Better pipeline of business for the Academy – Growth!
- A more leading role, representing small business rather than just a training provider
- Top tip: Be prepared to hand-hold the receiving employer in every step of the process

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Transfers – how it will work

Sending employer



Sending employer calculates available spend



Sending employer initiates a connection online using the account ID from the receiving employer



Sending employer gives final approval of cost and standard

Receiving employer



Both employers discuss and agree terms offline



Receiving employer sets up apprenticeship service account online



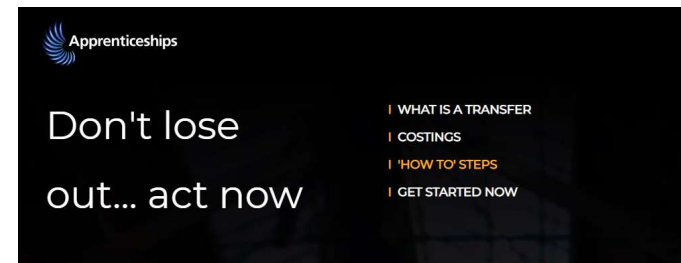
Receiving employer chooses a training provider. They both add and approve apprentices online



Provider

Apprenticeship can start and payments are made on a monthly basis

Guidance and support



3 steps to making a transfer

Step 1 Looking to find out how much allowance you have to transfer?
You can check in your account to see how much apprenticeship funding you have available.

Check now?
Go to your account. You can now check your available apprenticeship funds for transfer and those that are expiring. [Log into your account](#) and look at the funding projection tool - in the 'Finance' section.

Step 2 You identify a **receiving employer**
Then agree the details of the apprenticeship. For example, the cost, which apprenticeship standard, how many apprentices.

Your receiving employer can also find out more about the process by [downloading a Guide](#).

Step 3 To help you get started, we have created a short guide for **sending employers**.

Get started and make a transfer. [Download a Guide TODAY](#)



CASE STUDY: An example of workforce development within a sector

The Bassetlaw Teaching Hospitals NHS Foundation Trust is transferring levy funds to 4 independent GP surgeries to support training nursing associate Higher Apprentices role.

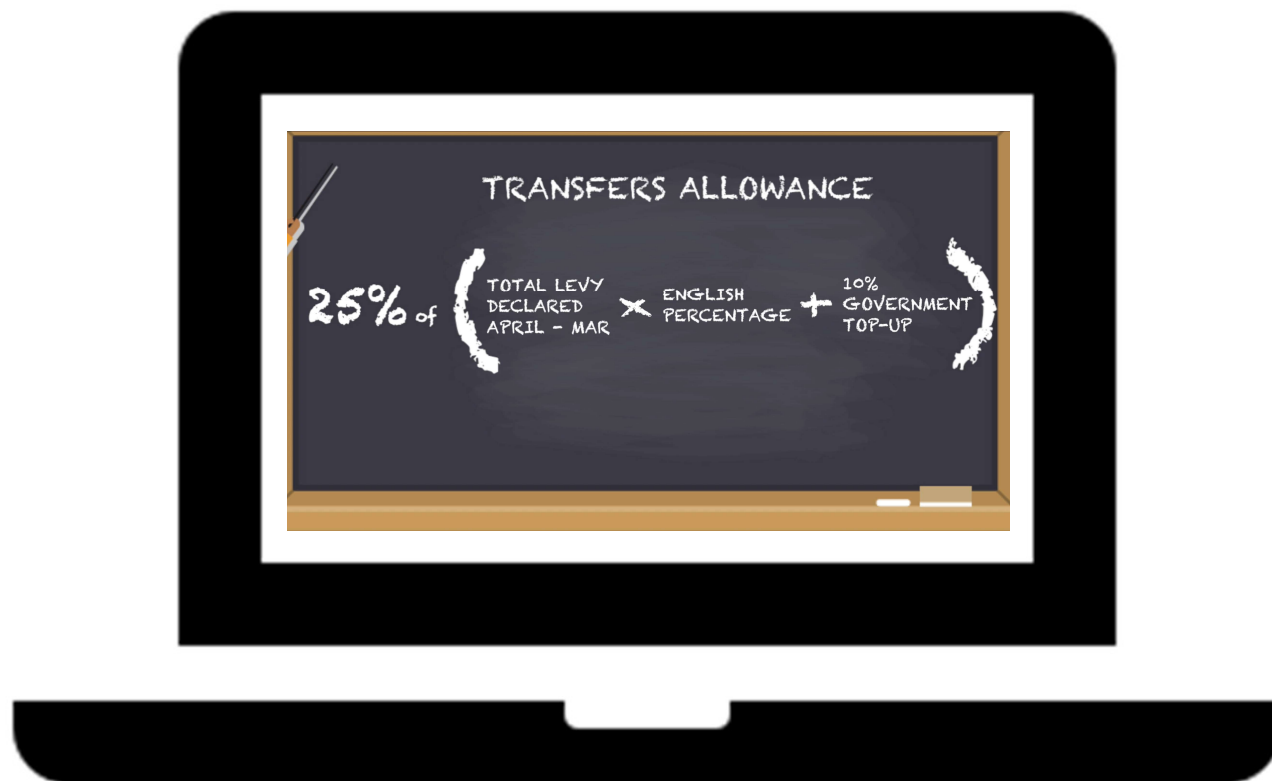
"The transfer will allow the same workforce development

<https://bit.ly/2ZiRqjL>

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Videos on YouTube



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Search for **“Using the apprenticeship service”**

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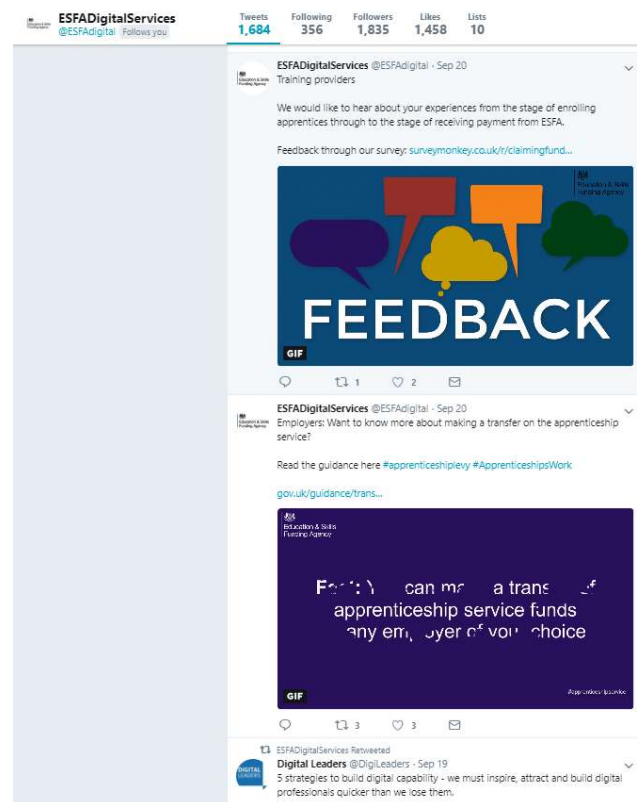
and monthly **Business Update** newsletter

Future webinars on Eventbrite
www.apprenticeshipservice.eventbrite.com

Queries about the apprenticeship service:
08000 150 600

helpdesk@manage-apprenticeships.service.gov.uk
Available : 8am – 10pm (everyday)

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Transfers: Provider's experiences

“BMet are at the beginning of the transfer journey and see it as a great opportunity to engage with Levy paying employers, helping them to transfer their unspent levy.”

Mike Smedley, BMet

“We were approached by an employer regarding a levy transfer. They wanted to transfer some of their levy account funds to help a smaller adult care provider. This has given more adult care provisions in the local authority, and benefitted the service users within the borough.

The process was simple and smooth, however it did require extra communication between the Levy account holder, training provider and the small business. It was no more difficult than a Levy to Provider cohort, just requiring a bit more communication.

The benefits are fantastic as it allows smaller companies to access additional apprenticeship funding.”

Tyron Wain, Director of Business Development, Quest Training

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Transfers: Provider's experiences

“Walsall College is already seeing great interest in the transfer of Levy funds from larger employers. The policy is even more flexible in the West Midlands, where we are working hand in hand with the Combined Authority to ensure the process is as smooth as possible. Within just the first few months of these new arrangements, we have successfully engaged a number of construction employers who are benefiting from the Levy transfer funds. The process for doing this is not time consuming or restrictive. We are already seeing the positive impact of this flexibility to both students and employers.”



James Norris, Assistant Principal, Walsall College

Questions



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