



# Using an apprenticeship levy pot to support organisations of all sizes

Health Education England (now NHS England) started a levy transfer service for the North East and Yorkshire in September 2019. They worked with NHS levy-paying organisations to maximise levy use by transferring excess levy into the system. These partners are from across health and care, including GP practices, dental practices, independent care homes, local authorities, care wards and hospices.

The team advertised directly to smaller organisations making them aware they could be levy recipients and working with those who contacted the team directly. By building relationships with NHS trusts they gained a better understanding of the levy funding available in the region.

Levy transfer supports both smaller and larger organisations, enabling them to develop comprehensive apprenticeship schemes as an integral part of their workforce plan.

By emphasising to private sector companies that it is in everyone's interest to support the health and social sector, levy transfer was agreed in support of their corporate social responsibility mandate. There are also ongoing conversations with universities in the region who may wish to provide levy funds to the sector.

The work put into making this an effective service is reflected in the size of the levy pot, increasing from £884,000 in 2019 to approximately £15 million today enabling around a thousand apprenticeships in the region. Therefore, there has been no recent situation where the team has been unable to support with funding. A fantastic achievement that shows the strength of creating system-wide collaboration.

The team spoke to trusts, supporting them to forecast their finances and recruitment plans to understand the pledges they

can make. Organisations are increasingly embracing strategic forecasting which provides clarity to interested smaller organisations. The service has supported small and medium organisations that wouldn't otherwise have had enough budget to embed apprenticeships into their workforce development plans.

"We have seen many benefits from implementing this service; greater utilisation of regional levy is one but ultimately it has led to the further strengthening and development of the workforce within small and medium employer organisations, demonstrating huge investment in our regional health and care workforce."

Rachel Chalk, Apprenticeship Development Manager, NHS England, North East and Yorkshire Region.

### Top tips for employers:

1. Strategically forecast apprenticeship numbers to calculate levy underspend or transfer needs.
2. Engage with localised levy transfer services to support all organisations in the system.
3. Levy transfer is not just for smaller organisations, your apprenticeship plan may require further investment.