

New Guidance on “Off the Job Training” and the 20% Rule

“The requirement to comply with the **20% rule** for **off-the-job training** has been a thorny one and employers have adopted differing approaches to dealing with it. However, **AELP** (the Association of Employment and Learning Providers) have recently issued **further guidance** on the application of the rule, which will hopefully make compliance much **easier** to plan for and to evidence.”



Sections of the guidance are quoted below. Do please ask us **if you would like a copy** of the full guidance emailed to you and would like to discuss its implementation.

“Off-the-job training is defined as “training received by the apprentice, during the apprentice’s normal working hours, for the purpose of achieving their apprenticeship. It is not training delivered for the sole purpose of enabling the apprentice to perform the work for which they have been employed. [It must be...] directly relevant to the apprenticeship framework or standard, teaching new knowledge, skills and behaviours required to reach competence in the particular occupation. (ESFA 2017/18 Apprenticeship Funding Rules)”

“When someone is in a new job or in a job where there is significant training required to be fully productive then even doing ‘normal’ tasks to get up to speed can feel like “training”. Where this training also teaches the knowledge, skills and/or behaviours required by the apprenticeship it can be included as off-the-job training. However, training that is only required for the job and not relevant to the apprenticeship cannot be included.”

“The expectation is that off-the-job training is specifically to support the development of new behaviours and also skills and knowledge linked to the actual vocational occupation.”

Further recent guidance has stated that the calculation of 20% must include holidays as well. However, the hours spent on **off-the-job training** do not have to be evenly spread on a weekly or even a monthly basis and could be **front end loaded or rear end loaded**.

Because the Apprenticeship Standards cover so many **generic knowledge, skills** and **behaviours** you should be able to relate much of this training to the Standards and **include it in** the record of **off-the-job training**. We have summarised the required Knowledge, Skills and Behaviours below, for information:

At Level 3: Business Awareness; IT Systems and Processes; Ethical Standards; Financial Accounting & Reporting; Management Accounting; Analysis; Communication; Produces Quality and Accurate Information; Uses Systems and Processes; Problem Solving; Embracing change; Adding Value; Ethics and Integrity, Personal Accountability; Productivity; Team Working and Collaboration.

Please call our Apprenticeships Administrator **Annie** on: **01392 311932**
Email: **annie@accountancylearning.co.uk**
Visit: **www.accountancylearning.co.uk**



At Level 4: Analysis; Communication; Leadership; Planning and Prioritisation; Produces Quality and Accurate Information; Team Working and Collaboration; Uses Systems and Processes; Adaptability; Adding Value; Ethics and Integrity; Proactivity; Professional Scepticism.

When you take on a new member of staff, practically everything they do will be **new** to them as they will be developing new knowledge, skills or behaviours. This should therefore be **recorded as "off the job training"** (o.t.j.t.) on our training logs and entered onto the **weekly log** on Moodle. A high proportion of their total o.t.j.t might therefore be achieved in **their first 3 or 4 months** in the office and/or after moving departments or taking on a different role. If this wasn't initially identified or recorded, a "catch up" entry should be made – provided their training log justifies this.

Prior to the current year's intake (and the progression of existing Level 3 Apprentices to Level 4), you may therefore wish to **review** your current policy with regards to the **more formal "study leave"** granted during paid working hours.

Example 20% off-the-job training plan

Duration of apprenticeship: 13 months = 56 weeks x 37 = 2,072 hours x 20% = **414.4** o.t.j.t. hours needed.

Example			
Direct o.t.j.t. with line manager, learning the job, office routines, new clients and processes:			
Period	Hours p.w. x weeks	= Hours	
1. Weeks 1 – 4	37 x 100% x 4	=148	
2. Weeks 5 – 8	37 x 75% x 4	=111	
3. Weeks 9 -12	37 x 50% x 4	=74	
4. Weeks 13-16	37 x 25% x 4	=37	
5. Weeks 17-56	2 x 40	=80	
Total o.t.j.t. by line manager		= 450	
<i>Other office based o.t.j.t.</i>			
6. Quarterly appraisals: 1hr x 4		=4	
7. In house training: 7.5hrs x 2		=15	
<i>Dedicated study time</i>			
8. In office or at drop-in: 2.5 x 50		=125	
Total off-the-job training planned		= 594	
(clearly well above the required 20% of 414.40 hours)			
The amount of o.t.j.t will vary by office and by job and will have other categories to the above. Feel free to tailor yours – and liaise with us over it			

We will work **closely with you** and **your apprentices** to draft an outline plan of how this o.t.j.t. will be achieved over the period of the Apprenticeship.

An added benefit of getting apprentices to record this "in office" o.t.j.t. is that they will better recognise that they have learned new skills and behaviours in the office and will value this more. This is, of course, the traditional training route in the profession – when one took one's Articles and most learning was performed in the office.

If you would like to **discuss the application** of the rules to your own situation, do please let us know and we will get back to you.

Your Plan			
Direct o.t.j.t. with line manager, learning the job, office routines, new clients and processes:			
Period	Hours p.w. x weeks	= Hours	
1. Weeks 1 – 4 x100% x 4	=	
2. Weeks 5 – 8 x 75% x 4	=	
3. Weeks 9 -12 x 50% x 4	=	
4. Weeks 13-16 x 25% x 4	=	
5. Weeks 17-56 x 40	=	
Total o.t.j.t. by line manager		=	
<i>Other office based o.t.j.t.</i>			
6. Quarterly appraisals: 1hr x 4		=	
7. In house training: 7.5hrs x 2		=	
<i>Dedicated study time</i>			
8. In office or at drop-in: 2.5 x 50		=	
Total off-the-job training planned		=	
We will have provided apprentices a spreadsheet on Moodle that they can adapt to fit the circumstances of their employment. Level 4 learners may well have less direct o.t.j.t			