apprenticeship FRAMEWORK

Local Taxation and Benefits (Wales)

IMPORTANT NOTIFICATION FOR ALL APPRENTICESHIP STARTS FROM 14 OCTOBER 2016

Modifications to SASW came into effect on 14 October 2016. These changes relate to the Essential Skills and Employer Rights and Responsibilities requirements of a framework and they ONLY apply to new Apprenticeship starts on, or after, 14th October. Apprenticeship starts before this date must continue to meet the 2013 SASW requirements for Essential Skills and Employer Rights and Responsibilities.

For more details of the changes and how they will affect new apprenticeship starts, please read the following preface page to the framework document. NB: Please check the "Revising a Framework" section for information on any additional changes that may have been made to this framework.

Latest framework version?

For any previous versions of this framework: www.acwcerts.co.uk/framework library

Issue date: Click or tap here to enter text.

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Local Taxation and Benefits (Wales)

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Framework information

Information on the Issuing Authority for this framework:

Instructus

The Apprenticeship sector for occupations in air conditioning, building services engineering, business and administration, cleaning, customer service, digital/information technology, electro technical, electrical and electronic servicing, enterprise and business support, facilities management, heating and ventilating, housing, human resources and recruitment, industrial relations, leadership and management, marketing and sales (also includes contact centres and third sector), plumbing, property and refrigeration.

Issue number: 3	This framework includes:
Framework ID: FR04356	Level 2 □ Level 3 ⊠ Level 4-7 □
Date this framework is to be reviewed by: 30/09/2023	This framework is for use in: Wales

Short description

This apprenticeship is for the local taxation and benefits sector. The apprenticeship is at Level 3 and is the entry point into the sector. Local taxation and benefits are administered by Local Authorities in Wales which includes District Councils and Unitary Authorities. There are a growing number of private companies who are contracted to provide benefit services to local councils. Job titles are local government revenues officer and local government benefits officer. This apprenticeship is intended to attract new people into the sector from local communities, to offer a career route and to upskill existing staff.

Roles in this framework are likely to fit into Standard Occupational Code (SOC): 41

Contact information

Proposer of this framework

This framework is published by Instructus Skills (former Asset Skills) on a non-statutory basis prior to the designation of issuing authorities for Wales.

Developer of this framework

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Revising a framework

Why this framework is being revised

This framework has been updated by Instructus Skills in order to amend contact details, and ensure qualifications are up to date. Some qualifications have been removed due to be being withdrawn and were replaced with the newly accredited IRRV Diploma following updates in line with new legislation.

Summary of changes made to this framework

This framework has been updated by Instructus Skills in order to amend contact details, and ensure qualifications are up to date. Inclusion of the newly accredited IRRV qualification following updates in line with legislation. Updated information relating to credit values, unit breakdowns, GLH and TQT figures.

Qualifications removed

Level 3 Diploma in Local Taxation and Benefits- 600/1738/7

Qualifications added

Level 3 Diploma in Local Taxation, Benefits and Advice- 600/7912/5

Qualifications that have been extended

N/A

Purpose of this framework

Summary of the purpose of the framework

Apprentices who work in Revenues and Benefits administration contribute positively to the well-being of their communities. Schools, the police, street cleaning and local social services rely on the efficient collection of local revenues and the less well off in society rely on the efficient administration of Housing and Council tax benefit.

Local Revenues and Benefits are administered by Local Authorities in Wales which includes District Councils and Unitary Authorities. There are a growing number of private companies who are contracted to provide benefit services to local councils. There may be possibilities to work for local Housing Associations and Citizens Advice Bureau offering advice on benefits. This is an apprenticeship at Level 3 and the entry point into the sector.

Local Government employs 10,000 within the Benefits sector and 10,000 within the Local Taxation sector. Some local authorities find it difficult to recruit experienced staff who are prepared to travel and rely on agency staff which can be expensive. In addition to this there can be problems in recruiting First Line Managers and Senior Managers who have the right skills. There is a need to 'home grow' local talent.

The challenges facing the sector are as follows:

- Legislation the need to keep up to date with constant changes to benefit and revenue legislation
- Maintaining high levels of service with reduced budgets
- Detecting fraudulent claims and overpayments this has become a big focus for Local
 Authorities and resources have had to be diverted to this area
- Ensuring local people, including businesses, are aware of their entitlements
- Front line customer service skills to meet customer demands

The future competences which are required are as follows:

- Management & Leadership being able to implement organisational and culture change, coaching and supporting staff with legislative changes
- Using specialist in-house ICT systems
- Investigative and analytic skills to detect fraud
- Skills and knowledge understanding and implementing changes in legislation and avoiding and spotting errors in calculations.

The above information was sourced from the former Asset Skills/IRRV employer survey, March 2010.

The apprenticeship will help to bring younger people into the sector to allow career progression

and to assist with hard to fill vacancies.

Employers have been involved in the design of the qualifications in the framework which will develop the critical skills required within the sector. The Framework has been developed to meet the skills priorities for Wales and the requirements of the Specification of Apprenticeship Standards for Wales.

Aims and objectives of this framework (Wales)

The aim of the apprenticeship is to attract new people into the sector, especially from local communities.

The objectives are as follows:

- Attract new people from under-represented groups into the sector.
- Make revenue and benefits a career of choice for people new to the sector
- Provide an entry route for a career in revenue and benefits at Level 3 into Level 4 jobs and higher, through further education and training, leading to professional status.
- Provide a progression route for Customer Service and Business Admin Foundation apprentices.

Entry conditions for this framework

Employers are looking to attract applicants from a wide range of backgrounds and experience, some of whom may have had experience, paid or unpaid, within the sector. Applicants will be expected to have basic literacy and numeracy skills on which this apprenticeship will build, be willing to work as part of a team, recognise and appreciate diversity and to communicate with a wide range of customers.

Training providers and employers will use initial assessment to ensure that applicants have a fair opportunity to demonstrate their ability and to tailor programmes to meet individual needs, recognising prior qualifications and experience.

As a guide, applicants may come from a range of routes including:

- · achieved any of the Essential Skills Wales
- achieved the Welsh Baccalaureate in Public Services
- achieved a Foundation apprenticeship in Business Administration, Customer Service or Housing
- academic qualification(s) such as one or more GCSEs, AS or A levels.

Rules to avoid repeating qualifications

1. Essential Skills Wales

Where Essential Skills qualifications are specified in an apprenticeship framework (Level 3), the apprenticeship framework must specify as a Welsh certificate requirement, the acceptance of one of the following recognised proxy qualifications.

For Communication:

- GCSE or iGCSE qualification in English language or literature to at least grade C (Level 2 equivalent); or
- O Level Qualification in English language or literature to at least grade C; or
- A/AS Level qualification in English or literature to at least grade E; or
- SCQF Level 5 Communication Core Skills (Oral communication and written communication); or
- SQA National 5 English; or
- Functional Skills or Key Skills literacy qualifications in English provided the proxy qualification(s) attained is at Level 2 or above.

For Application of Number:

GCSE or iGCSE qualification in Mathematics to at least grade C (Level 2 equivalent); or

O Level Qualification in Mathematics to at least grade C; or

- A/AS Level qualification in Mathematics to at least grade E; or
- SCQF Level 5 Numeracy Core Skill (Graphical information and using number); or
- SQA National 5 Mathematics; or
- Functional Skills or Key Skills numeracy qualifications in Mathematics provided the proxy qualification(s) attained are at Level 2 or above.

2. Qualifications

If applicants have previously completed units that are within one of the combined qualifications, it is possible that this can count towards the total credits of the framework. It is necessary for your Awarding Body to verify all occurrences of the recognition of prior learning.

3. Prior experience

Applicants already working in the sector are able to have their prior experience recognised by the Awarding Organisation and this will count towards the competence and the knowledge qualifications in this framework.

Initial Assessment

Training providers and employers will use initial assessment to ensure that applicants have a fair opportunity to demonstrate their ability and to tailor programmes to meet individual needs, recognising prior qualifications and experience.

Level 3

Title for this framework at level 3

Local Taxation and Benefits

Pathways for the framework at level 3:

Pathway 1: Local Taxation and Benefits

Level 3, Pathway 1: Local Taxation and Benefits

Description of this pathway

Local Taxation and Benefits- 62 credits

- 19 credits minimum Competence*
- 23 credits minimum Knowledge*
- 12 for Essential Skills Wales

Entry requirements for this pathway in addition to the framework entry requirements

There are no additional requirements other than the general entry conditions.

^{*}Pathway minimums must add up to 50 credits for the full Diploma.

Job title(s)	Job role(s)
Local Government Revenues Officer	Duties will include: calculating rents, council tax and business rates; sending bills and issuing reminders; collecting and processing payments; dealing with enquiries face-to-face, by letter or by phone; recovering arrears of rent or council tax.
Local Government Benefits Officer	Duties will include: assessing whether people are entitled to housing and council tax benefits; communicating with other government agencies; dealing with enquiries face-to-face, by letter or by phone; recovering overpayments of benefit.
Local Government Revenue and Benefits Officer	Duties will include a combination of the above including dealing with enquiries face-to-face, by letter or by phone, recovering arrears or overpayments.

Qualifications

Competence qualifications available to this pathway

N/A

Knowledge qualifications available to this pathway

N/A

Combined qualifications available to this pathway

B1 – Level 3 Diploma in Local Taxation, Benefits and Advice						
No.	Ref no.	Awarding organisation	Credit value	Guided learning hours	UCAS points value	
B1a	600/7912/5	IRRV	50	344- 364	510	

Relationship between competence and knowledge qualifications

If an apprentice follows the Advice route within the main qualification, they will achieve a total of 31 credits and 19 competency credits. The following knowledge units will be mandatory:

- Understand the law relating to local taxation, valuation and billing (6 credits)
- Understand the law relating to local taxation, enforcement and recovery (4credits)
- Understand the law relating to routine Housing Benefit cases (6 credits)
- Understand the law relating to non-routine Housing Benefit cases (4 credits)
- Understand the law relating to Local Council Tax Support (5 credits)

• Understand the administration of Local Taxation and Benefit Services (6 credits) OR Understand the law and principles of detecting fraud (6 credits).

If an apprentice follows the Local Taxation route within the main qualification, they will achieve a total of 26 knowledge credits and 24 competency credits. The following knowledge units will be mandatory:

- Understand the law relating to local taxation, valuation and billing (6 credits)
- Understand the law relating to local taxation, enforcement and recovery (4credits)
- Understand the general principles of housing benefit (5 credits)
- Understand the law relating to Local Council Tax Support (5 credits)
- Understand the administration of Local Taxation and Benefit Services (6 credits) OR Understand the law and principles of detecting fraud (6 credits).

If an apprentice follows the Benefits route within the main qualification, they will achieve a total of 26 knowledge credits and 24 competency credits. The following knowledge units will be mandatory:

- Understand the law relating to routine Housing and Council Tax Benefit cases (6 credits)
- Understand the law relating to Local Council Tax support (5 credits)
- Understand the law relating to non-routine Housing Benefit and Council Tax Benefit cases (4 credits)
- Understand the general principles of Local Taxation (5 credits)
- Understand the administration of Local Taxation and Benefit Services (6 credits) OR Understand the law and principles of detecting fraud (6 credits).

If an apprentice follows the Generic route within the main qualification, they will achieve a total of 23 knowledge credits and 27 competency credits. The following knowledge units will be mandatory:

- Understand the law relating to local taxation, valuation and billing (6 credits)
- Understand the law relating to routine Housing and Council Tax Benefit cases (6 credits)
- Understand the law relating to Local Council tax Support (5 credits)
- Understand the administration of Local Taxation and Benefit Services (6 credits) OR Understand the law and principles of detecting fraud (6 credits).

Essential Skills

An apprenticeship framework must specify as a Welsh certificate requirement the expected achievement levels of Essential Skills in Communication and the Application of Number.

Where Essential Skills qualifications are specified in an apprenticeship framework, the apprenticeship framework must specify the acceptance of a recognised proxy qualification for Communication and Application of Number.

Communication

For the current list of acceptable proxy qualifications and appropriate **minimum** grade/level requirements, please refer to the most recent version of <u>SASW</u> on the <u>gov.wales</u> website. Additional guidance materials can be found on the <u>Knowledge Base</u> section of the <u>ACW</u> website.

Does this framework require Communication achievement <u>above</u> the minimum SASW requirement? YES \Box NO \boxtimes
If YES, please state the grade/level required for English and give a brief REASON as to why this is required:
Enter alternative grade/level requirements and reasons here.
Application of Number
For the current list of acceptable proxy qualifications and appropriate <u>minimum</u> grade/level requirements, please refer to the most recent version of <u>SASW</u> on the <u>gov.wales</u> website. Additional guidance materials can be found on the <u>Knowledge Base</u> section of the <u>ACW</u> website.
Does this framework require Application of Number achievement <u>above</u> the minimum SASW requirement? YES \square NO \boxtimes

If YES, please state the grade/level required for Maths and give a brief REASON as to why this is required:				
Enter alternative grade/level requirements and reasons here.				
Inclusion of Digital Literacy (ICT)				
Digital Literacy (ICT) is an optional framework requirement.				
Is Digital Literacy a requirement in this framework? YES \square NO \square				

Progression routes into and from this pathway

Progression into this Level 3 Apprenticeship

Applicants will come from a variety of routes which may include any of the following:

- Previous experience in a customer/business admin orientated environment
- Level 2 Foundation Apprenticeship in Customer Services, Business Administration or Housing
- GCSE/AS or A Levels
- Welsh Bacculaurate in Public Services
- Work experience, paid or unpaid.

Progression from this apprenticeship

- Level 4 and Level 5 qualifications
- Professional progression through membership of the IRRV
- Promotion to senior roles such as team leader, first line manager and investigative benefit fraud
- Progression to HND and Foundation degrees in Local Government administration.

For more information on foundation degrees please visit: http://fd.ucas.com/CourseSearch/.aspx

For more information about the professional organisation, IRRV, please visit: http://www.irrv.net

UCAS points for this pathway:

N/A

Employee rights and responsibilities

Please note that for Apprenticeship starts from 14/10/2016 onwards ERR is no longer a **mandatory** requirement in all frameworks.

However, it may still be included in some frameworks and where it is not explicitly stated that ERR is not a requirement then confirmation of an Apprentice's ERR achievement will still remain a requirement for Apprenticeship certification purposes.

Is ERR a requirement for this framework?	YES		NO	\boxtimes	
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Delivery and assessment

The Employee Rights and Responsibilities component of the apprenticeship can be achieved through either:

1. A ERR Qualification/Unit:

- The L/506/1905 Employee rights and responsibilities unit this is an optional unit included within the combined qualification
- The Level 2 Award in Employee Rights and Responsibilities this qualification is offered by a range of organisations
- Any other approved unit or qualification listed in Instructus Skills FAQ.

2. ERR Workbook:

The Instructus Skills ERR workbook, available from the Instructus Skills E-learning portal (elearning.instructus.org) - The workbook has been designed to enable apprentices to work their way through a series of questions and activities which will bring ERR to life, making the learning more meaningful and long lasting and enhance the employability skills of the apprentice.

ERR National Outcomes

- 1. knows and understands the range of employer and employee statutory rights and responsibilities under Employment Law. This should cover the apprentice's rights and responsibilities under the Employment Rights Act 1996, Equality Act 2010, and Health and Safety legislation, together with the responsibilities and duties of employers;
- 2. knows and understands the procedures and documentation in their organisation which recognise and protect their relationship with their employer. Health & Safety and Equality & Diversity training must be an integral part of the apprentice's learning programme;
- knows and understands the range of sources of information and advice available to them on their employment rights and responsibilities. Details of Access to Work and Additional Learning Support must be included in the

- programme
- 4. understands the role played by their occupation within their organisation and industry;
- 5. has an informed view of the types of career pathways that are open to them;
- 6. knows the types of representative bodies and understands their relevance to theirskill, trade or occupation, and their main roles and responsibilities;
- 7. knows where and how to get information and advice on their industry, occupation, training and career;
- 8. can describe and work within their organisation's principles of conduct and codesof practice;
- 9. recognises and can form a view on issues of public concern that affect their organisation and industry.

Evidence of achievement of ERR

As ERR is part of the Apprentice Certificate Claim Form, there is no longer a requirement to evidence ERR completion when applying for apprenticeship certificates. However, we recommend that an internal record of ERR achievement is retained.

How equality and diversity will be met

How equality and diversity will be met

Within the sector there are three levels of staff which are Administration, Team Leaders and Managers. In terms of age profile young people, aged 18-25, represent 18% of the workforce and are concentrated in the administration category. Female staff constitute 60% of the workforce in administration, but this reduces to 30% in the team leader section and 10% in the managerial section. These figures would indicate that insufficient women are progressing to the higher levels.

20% of the workforce is from an ethnic background made up as follows:

Black/Caribbean (10%) Asian (5%) Chinese (3%) Other (2%)

1% of the sector is disabled which is below the UK average. These figures have been sourced from the IRRV and reflect membership figures.

These figures would indicate that not enough women are entering the higher levels of the sector and that disabled people are under-represented.

The sector is taking the following steps to rectify the gender imbalance and to recruit disabled staff:

- Raising awareness in schools about local taxation and benefits as a career through job profiles cards and career progression pathway information
- Use of non stereotypical images on the careers website and materials
- Case studies for the sector which present under-represented groups as an important part of the local taxation and benefits workforce

Employers and the professional organisation IRRV will encourage apprentices to progress onto FE or through the professional route. To promote more diversity amongst the workforce, to tackle

... Local Taxation and Benefits (Wales) unemployment and to raise social mobility the sector intends to recruit apprentices from amongst its local communities.

Training providers and employers MUST comply with the Equality Act 2010 to ensure that applicants are not discriminated against in terms of entry to and promotion within, the Industry, using the 9 protected characteristics of :

- 1. Age
- 2. Disability
- 3. Gender
- 4. Gender reassignment
- 5. Marriage and civil partnerships
- 6. Pregnancy and maternity
- 7. Race
- 8. Religion and belief
- 9. Sexual orientation.

Instructus Skills will monitor take up and achievement of all Apprenticeships through its Housing Employer Group and continue to take steps to address any barriers to take up and achievement as part of our Sector Qualifications Strategy

On and off the job training

Summary of on- and off-the-job training

Job roles within Local Taxation and Benefits require a through level of technical competency and knowledge, which will be undertaken through work-based training practice and experience.

The total number of hours for this apprenticeship is: 466

This figure includes training time for the integrated qualification, Essential Skills Wales, ERR induction and hours for mentoring/progress reviews. It is envisaged that the framework will take 12 months to complete.

In Wales there is an additional facility to recognise prior achievement of both knowledge and skills. The balance of recognition will be based on the training providers initial assessment training hours delivered under an apprenticeship agreement may vary depending on the previous experience and attainment of the apprentice. The amount of off and on-the-job training required to complete the apprenticeship under the apprenticeship agreement may then be reduced accordingly, provided the total number of hours for this framework can be verified for apprenticeship certification (see below for more details). The time limit for previous attainment has been set at three years prior to applying for apprenticeship certification.

Off-the-job training

Off-the-job training is defined as time for learning activities away from normal work duties.

Off-the-job training may include any activity where an apprentice receives any form of instruction, tuition, assessment or progress reviews. For illustration (but not exclusively) private study, coaching, mentoring, e-learning, distance learning or classroom training may count as off-the-job training, provided it is carried out during paid work time.

For this framework the amount of off-the-job training is 236

This includes training for the knowledge units and Essential Skills Wales. Depending on the delivery model of the training provider it can also include the Wider Key Skill - Improving Own Learning and Performance and ERR induction and training.

How this requirement will be met

Off-the-job training needs to:

be planned, reviewed and evaluated jointly between the apprentice and tutor, mentor or manager allow access as and when required by and apprentice either to a tutor, teacher, mentor or manage be delivered during contracted working hours

be delivered through one or more of the following methods listed above

Off-the-job training must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records.

Evidence of off the job hours

When claiming the Apprenticeship certificate, training providers will be required to sign the Apprenticeship Certificate Claim form, stating that the total training hours have been met by the learner. The Claim Form can be downloaded from ACW: https://acwcerts.co.uk/web/forms-documentation

Previous attainment

Where a learner enters an apprenticeship agreement having previously attained parts or all of the relevant qualifications, this prior learning needs to be recognised using either QCF credit transfer for achievements within the QCF; or through recording or exemptions for certificated learning outside of the QCF, for example Principal Learning qualifications. For apprentices who have already achieved the relevant qualifications, they must have been certificated within three years of applying for the Apprenticeship Certificate.

Previous experience

Where a learner enters an apprenticeship agreement with previous work-related experience, this prior learning needs to be recognised. To count towards apprenticeship certification, previous experience must be recorded using the appropriate Awarding Organisation's "QCF recognition of Prior Learning" procedures and the hours recorded may then count towards the off-the-job hours required to complete the apprenticeship.

On-the-job training

On-the-job training is defined as skills, knowledge and competence gained within normal work duties. Depending on the training providers delivery model it could include Essential Skills Wales, the Wider Key Skill of Improving Own Learning and Performance and ERR induction and training.

For this framework the amount of on-the-job training is 230

Examples of on-the-job training could include:

- coaching and mentoring
- job shadowing
- company updates on policy and procedures, including induction
- instructions, briefings and guidance given whilst on-the-job
- workplace observations.

How this requirement will be met

On-the-job training needs to be:

- planned, reviewed and evaluated jointly between the apprentice and tutor, mentor or manager
- accessible as and when required by and apprentice either to a tutor, teacher, mentor or manager

- delivered during contracted working hours
- formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records.

Evidence of on the job training hours

As part of the evidence requirements for Apprenticeship Completion certification, a copy of a completed Apprentice Consent Form may be requested. ACW: https://acwcerts.co.uk/web/forms-documentation

Previous attainment and experience

Where a learner enters an apprenticeship agreement having previously attained or acquired the appropriate competencies this prior learning needs to be recognised and documented using the relevant credit transfer, an exemption or Recognition of Prior Learning (RPL) procedures (same as off-the-job above). The amount of on-the-job training required to complete the apprenticeship under the apprenticeship agreement may then be reduced accordingly, provided the number of on-the-job hours for this framework can be verified for apprenticeship certification.

Apprentices who commence training under a new apprenticeship agreement with a new employer may bring a range of prior experience with them. When an apprentice can claim a substantial proportion of hours towards the on-the-job framework total through prior learning acquired form previous employment or other vocational programmes, then the apprentice's learning programme should include 'customisation'. Training providers are encouraged to identify additional on-the-job training programmes that customise the learning to the new workplace. Customisation programmes may include selecting appropriate units from qualifications, or relevant units recognised as Quality Assured Lifelong Learning (QALL) through a CQFW recognised body, or follow Essential Skills at a level higher than that specified in the framework and other competency-based qualifications/units relevant to the workplace.

The training provider must have transparent RPL procedures in place to evidence the level of RPL recognition.

For apprentices who have already achieved the relevant qualifications, they must have been certificated within three years from the date of application for the Apprenticeship Certificate or have been continuously employed in the industry for eighteen months.

Wider key skills assessment and recognition

While Wider Key Skills are not a **mandatory** part of the framework, training providers are encouraged to provide apprentices the opportunity to achieve them.

For this framework, there are natural opportunities for Wider Key Skills to be embedded within the mandatory units of the following qualifications:

Enter Qualification Names			

Improving own learning and performance

Give examples - signpost to specific units in framework qualifications that would meet these requirements

Working with others

Give examples - signpost to specific units in framework qualifications that would meet these requirements

Problem solving

Give examples - signpost to specific units in framework qualifications that would meet these requirements

apprenticeship FRAMEWORK

For more information visitwww.acwcerts.co.uk/framework library