

# Levy Transfers Case Study

**London NHS Trusts are supporting  
The Royal Star and Garter Homes  
by transferring apprenticeship funds**  
By Jennifer Stone, Apprenticeship Relationship Manager for  
London and Southeast

## Royal Star and Garter Homes:

Royal Star and Garter Homes Charity was established in 1916 to care for severely disabled young men returning from the battlegrounds of the First World War. Today, they provide outstanding person-centred care and therapies to ex-Servicemen and women and their partners who are living with disability or dementia. The Charity enhances residents' quality of life through their varied and stimulating range of in-house therapies, activities and outings that are tailored to the requirements and interests of each individual resident.

They have three state-of-the-art Care Homes in Surbiton, Surrey, Solihull, West Midlands and High Wycombe, Buckinghamshire. Their aim is to help residents live their lives to the full by providing pioneering, highly specialised nursing, dementia and therapeutic care in a stimulating and homely environment.

The Director of Care at Royal Star and Garter Homes became excited at the prospect of being one of the first Nursing Homes to have their own home-grown HealthCare Assistants on the newly introduced 2-year Nursing Associate Apprenticeship programme.

The Royal Star & Garter Homes started paying approximately £1800.00 monthly into the apprenticeship levy fund when it was introduced in April 2017 and in January 2019, three of their Healthcare Assistants at their home in Surbiton commenced a 2-year Trainee Nursing Associate apprenticeship standard with St George's NHS Trust/Kingston University. They wished to extend this further but required a levy transfer to enable this to happen.

Malcom Brown, Learning & Development Manager at The Royal Star & Garter Homes said *"While attending conferences, seminars and events in 2017, particularly within the Health and Social Care sector, two themes appeared to me to be predominant. Firstly, the conversations and language amongst delegates was aimed at shifting from health and social care diplomas for staff to health and social care apprenticeships in order to utilise the levy fund. Secondly and more worrying, were comments from delegates that there would be unused levy"*. Therefore, it struck him that there will inevitably be a surplus amount of money, which would not be kept within the Health and Social Care sector. Malcom researched and explored the concept of the levy fund transfer.

## **The Levy Transfer:**

In November 2018 Malcom attended a 'Skills for Care' event about the Apprenticeship Levy during which he became aware of the existence of the Health Education England (HEE) NHS 'Levy Transfer Matchmaking' service. The free match-making service is a brokerage system to permit Levy transfer opportunities providing a way to productively utilise unspent Levy funds to support wider regional workforce skills and development needs.

Malcom said, *"this was the single most important piece of information throughout the event as this is what I had been waiting for"*.

Shortly after the event Malcom contacted me about the possibility of an NHS Trust transferring apprenticeship levy funds to The Royal Star & Garter Homes.

Malcom provided me with an overview of how they wished to spend transfer levy funds, which mainly focused on the following:

- Three (additional) Nursing Associates from the Surbiton home at St George's NHS Trust and Kingston University
- Three Nursing Associates from the Solihull home at Birmingham City University
- Three Nursing Associates from the (new) High Wycombe home at Bucks New University

After securing levy funds through the HEE matchmaking service I contacted Malcom to tell him the great news - St. George's University Hospitals NHS Foundation Trust had agreed to fund three Trainee Nursing Associates at their Surbiton home, and Guy's & St. Thomas' NHS Foundation Trust had agreed to fund the six Nursing Associates from the Solihull and High Wycombe homes.

Malcom found the digital apprenticeship account incredibly straightforward and user-friendly. The 'Transfer' tab within the Finance section allowed him to see who he had received a connection from the sending organisation and how much they have agreed to transfer in total for example: £45,000.00 from St. George's University Hospitals NHS Foundation Trust for three Trainee Nursing Associates. This process was then simply repeated with Guy's & St. Thomas' NHS Foundation Trust.

## **St George's University Hospitals NHS Foundation Trust:**

St George's University Hospitals NHS Foundation Trust is the Lead Employer for a Pilot Test Site for the Trainee Nursing Associate initiative and had been working with the Royal Star and Garter from the beginning of the project. The Royal Star and Garter provided our South West London Consortium trainees with work placements in their Sutton care home; which met one of the essential work experience requirements of the training programme.

Sarah James, Associate Director of Workforce at St George's University Hospitals NHS Foundation Trust said *"We were thrilled when they decided that the role would work in their setting too, and so when the request for a levy transfer was received, we were only too happy to help as we see the care homes as a crucial part of the health and social care system. It's in all our interests to have skilled staff in every setting"*.

Mark Riley, Learning & Development Manager at St George's University Hospitals NHS Foundation Trust added *“For the sending organisation, the process is a simple, 4-step procedure, where the receiving organisation does most of the work:*

- *Receiver sends through their Apprenticeship Service ID number*
- *Sender enters ID number onto the Apprenticeship Service to link our organisations*
- *A “handshake” is initiated, and sender gets notified when receiver has accepted the link*
- *Sending Trust receives Apprentice details for approval, allowing final control over numbers (and total value of transfers)*

*Quick and easy – as long as the receiving trust has all relevant details to hand before the process starts.”*

### **Guy’s and St Thomas’ NHS Foundation Trust:**

Guy’s and St Thomas’ NHS Foundation Trust said they were delighted to support Trainee Nurse Associate apprenticeships at The Royal Star and Garter Homes, utilising their unspent Apprenticeship Levy.

Guy’s and St Thomas’ NHS Foundation Trust, Apprenticeship Advisor – Jo Young said

*“Having taken the decision to ‘gift’ levy funds to other organisations we were looking for opportunities within the Health Economy that also met our organisational values.*

*The Royal Star and Garter Home was a perfect fit, providing nursing and dementia care for veterans and their partners. In supporting them to train and develop Nurse Associates we are also helping to build the Nursing Workforce of the future”.*

Jo added *“With help and guidance from Health Education England, both parties were able to set up the transfer on the Digital Apprenticeship System very easily, making it a smooth and painless process”.*

### **Final word from Malcom Brown:**

*“On behalf of The Royal Star & Garter Homes may I express my sincere thanks to you all, for agreeing to transfer apprenticeship levy funds to pay for our future Trainee Nursing Associates from our Surbiton, Solihull and High Wycombe homes.*

*Although we are a very small Charity with three Nursing Homes, we feel that we are leading the Social Care demand for Trainee Nursing Associates”.*