



A

MODERN APPRENTICESHIP

IN

Customer Service at SCQF Level 6

FRAMEWORK DOCUMENT
FOR
SCOTLAND

SKILLS CFA

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Contents

| | |
|--|----|
| Modern Apprenticeships in Scotland | 3 |
| Modern Apprenticeships in Customer Service | 4 |
| Summary of Framework | 8 |
| The Framework | 9 |
| Registration and certification | 10 |
| Recruitment and selection | 10 |
| Equal opportunities | 11 |
| Health and safety | 11 |
| Contracts | 11 |
| Employment status of Modern Apprentices | 12 |
| Terms and conditions of employment | 12 |
| Training and development | 12 |
| Consultation | 16 |
| Career progression | 18 |

Appendices

| | | |
|------------|--------------------------------------|----|
| Appendix 1 | Stakeholder Responsibilities | 20 |
| Appendix 2 | Modern Apprenticeship Centres (MACs) | 23 |
| Appendix 3 | Training Agreement and Training Plan | 24 |

Modern Apprenticeships in Scotland

What are Modern Apprenticeships?

Modern Apprenticeships offer those aged over 16 paid employment combined with the opportunity to train for jobs at craft, technician and management level.

Who develops them?

Modern Apprenticeships are developed by Sector Skills Councils (SSCs). SSCs consult with employers and key partners in their sector to produce a training programme, which meets the needs of employers.

Who are they for?

Modern Apprenticeships are available to employees aged 16 or over. Employees need to demonstrate to their employer that they have the potential to complete the programme. All Modern Apprentices must have a demonstrable need to acquire significant new knowledge and skills to fulfil their job role. The modern apprenticeship framework selected for the employee must be the most appropriate learning programme generally available to that individual, providing such knowledge and skills.

What's in a Modern Apprenticeship?

In Scotland, there are more than 70 different Modern Apprenticeship Frameworks and they are all designed to deliver a training package around a minimum standard of competence defined by employers through SSCs. There are four different levels of Apprenticeship in Scotland: SCQF 5 (SVQ 2), SCQF 6/7 (SVQ 3), SCQF 8/9 (SVQ 4) and SCQF 10 (SVQ 5). They all contain the same 3 basic criteria:

- A relevant SVQ (or alternative competency based qualifications)
- Core Skills
- Industry specific training

Details of the content of this specific Modern Apprenticeship are given in the next section.

Modern Apprenticeships in Customer Service

The revised Customer Service Modern Apprenticeships (CSMA) have been developed by Skills CFA, the pan sector standard setting organisation for the UK, in partnership with Scottish employers, training providers and other key stakeholders. The updated Customer Service Modern Apprenticeship at SCQF Levels 5 and 6 offer employers the opportunity to select an apprenticeship appropriate to their organisation and sector.

The key purpose of customer service is to 'Win and maintain customer satisfaction and loyalty whilst continuously monitoring and improving customer service'¹.

The revised CSMA help to develop the skills, knowledge and competencies required to be effective Customer Service Professionals. It is therefore important that the CSMA are reviewed to ensure they remain current and up-to-date.

Overview of the Customer Service Sector

In an increasingly service-led economy, customer demand for better and more individualised service is set to continue to increase. There is a need to raise customer service standards and increase the supply of people with customer service skills. Employers in Scotland have a major role to play in this, and most employers acknowledge their need to up-skill their current workforce and recruit new staff. The existing workforce needs to be up-skilled and new people attracted into customer service job roles. As competition grows and social networking is increasing, customer expectations are continuously rising. To meet these challenges, employers must find new and innovative ways of providing customer confidence. This can be achieved by ensuring that high levels of customer service skills are practiced by management and employees throughout their organisation and by ensuring that policies and practices of the organisation reflect best practice in customer service.

Employers are therefore under pressure to keep up with, and exceed changing customer expectations and the increasing need for customer satisfaction and loyalty. This applies equally to the public, private and charity/voluntary organisations working across all industry sectors. Those employers who are making progress in improving their service delivery are acting on three broad but inextricably linked fronts: their strategy and culture; their processes, including the use of technology and social media; and their people.

In the case of their people, employers are increasingly recognising the importance of instilling a customer service ethos throughout their organisations, not least in terms of the relationships between people within the organisation. Many employers are putting particular emphasis on the skills of staff that are in direct contact with the customer, recognising that it is they who play a major role in determining the quality of the customer experience. This has driven the establishment of customer service as an occupational area in its own right, with a growing number of people in jobs where the primary performance requirement is to deploy customer service skills.

Customer demands are now driving the new service led economy through changes in new technology and the rise of social media and networking.

These changes are now underpinning the drive for efficiency in response to:

- increased emphasis on high level customer service skills
- recruiting, up-skilling and retaining staff who are competent and motivated to support their customers
- raising product and service quality
- delivering high speed and effective responses
- changes in production methods and the management of human resources
- elasticity of demand for different products and services
- changes in tastes and preferences
- changes to the patterns of demand
- emphasis on high value added

¹ Skills CFA Customer Service Functional Map: December 2012

- higher quality, high specification goods and services
- UK wide and global competition.

The shift in power from organisations to customers, particularly in terms of customer expectations and loyalty, is now defining the way that organisations engage with customers. Customer demands are now leading the way and organisations and their staff have to adapt and respond by using a wider range of technological, social and networking tools to engage with and respond to higher levels of service for customers. As customers now increasingly expect an instant response and consistently high levels of service when dealing with an organisation they also expect this from the individual customer service staff.

Employers in all sectors continue to report significant changes in customer behaviour resulting from enhanced expectations about the standard of service customers expect to receive, and customers now demonstrate:

- a much greater willingness to complain
- a demand for faster response times
- a stronger propensity to make cross-sector and/or organisational comparisons about service standards and
- a desire for services which are tailored to their individual needs.

These changes in customer behaviour impact significantly on employees who can no longer be complacent and must meet new challenges to satisfy the customer. The technological and social skills needed in customer service have been revisited and amended in the revised Customer Service National Occupational Standards (NOS) approved in January 2013, which includes new standards that reflect the growing impact of social media.

Given the reasons discussed above it is important that the Customer Service Modern Apprenticeships are reviewed to ensure they remain current and up-to-date.

Labour Market Information for the Customer Service Workforce

UK Employment by occupation (July 2015 – June 2016)²

| | Scotland | England | Wales | Northern Ireland | UK |
|-------------------------------------|-------------------|---------------------|-------------------|------------------|---------------------|
| Sales & Customer Service | 222,800 (8.7%) | 1,960,400 (7.4%) | 118,300 (8.3%) | 82,000 (9.9%) | 2,383,500 (7.6%) |

There are 222,800 people employed in Sales and Customer Service roles in Scotland, which represents 8.7% of the Scottish workforce. These figures demonstrate that the Sales and Customer Service occupation represent a significant percentage of the Scottish workforce and makes a significant contribution to the Scottish economy.³

The main objectives of the Customer Service Apprenticeships are to:

- support the development of a highly skilled Customer Service workforce in Scotland
- equip individuals with the skills, knowledge and experience needed to provide excellent Customer Service across a wide range of sectors
- provide a flexible entry route into a career in Customer Service
- provide apprentices with an opportunity to raise their skill levels and develop the skills, knowledge and experience they need to progress to higher level job roles with additional responsibilities
- increase the supply of people with high levels of Customer Service skills to address the skills gaps and shortages found in organisations focussing on Customer Service
- give apprentices the opportunity to develop their core skills in communication, numeracy, ICT, working with others and problem

² Official Labour Market Statistics - Nomisweb.co.uk, Search October 2016

³ Official Labour Market Statistics - Nomisweb.co.uk, Search October 2016

solving.

Customer Service Job Roles

Customer service requires generic skills which are in demand in wide-ranging job roles across sectors and organisational boundaries. Many employers in the private, public and third sectors now recognise that customer service is a strategic issue which impacts on organisational reputation and success, and that the development and improvement of customer service requires action in the areas of organisational strategy and culture, the processes that underpin service delivery and the skills of those involved in delivering and supporting customer service delivery.

Employers are recruiting new staff solely dedicated to customer service whilst also developing the skills of existing staff who are in direct contact with customers, recognising that it is they who play a major part in determining the quality of the customer experience.

There are a growing number of individuals whose ‘occupational identity’ is ‘customer service’, i.e. because the primary function of their job role is customer service, and whose career in customer service will take them from organisation to organisation, department to department, and sector to sector.

| Job Titles for Customer Service Occupations | |
|---|--|
| SCQF level 5 | SCQF level 6 |
| Customer Service Trainee | Customer Relationship Manager |
| Customer Service Assistant | Customer Support Agent |
| Customer Service Advisor | Customer Support Officer |
| Customer Service Administrator | Customer Service Executive Officer |
| Customer Service Representative | Customer Service Delivery Co-ordinator |
| Customer Service Agent | Customer Service Operator |
| Customer Service Officer | Customer Service Team Leader |
| Customer Liaison Officer | Customer Service Supervisor |
| Customer Liaison Assistant | Customer Service Manager |
| Customer Liaison Executive | Senior Customer Service Advisor |
| Customer Service Clerk | Customer Relations Officer |

Customer Service Apprenticeship take-up

Customer Service (CS) Modern Apprentices in Training Data

| 2013-2014 ⁴ | | | | 2014-2015 ⁵ | | | | 2015-2016 ⁶ | | | |
|------------------------|---------|----------|--------------|------------------------|---------|----------|--------------|------------------------|---------|----------|--------------|
| CS Female | CS Male | CS Total | All MA Total | CS Female | CS Male | CS Total | All MA Total | CS Female | CS Male | CS Total | All MA Total |
| 429 | 308 | 737 | 35,582 | 401 | 319 | 720 | 35053 | 204 | 163 | 367 | 36371 |
| 58% | 42% | 2% | 100% | 56% | 44% | 2% | 100% | 56% | 44% | 1% | 100% |

For the year 2015 – 2016 there were 367 Customer Service Modern Apprentices in training with 56 per cent female and 44 per cent male. This represents 1% of all MAs in training in Scotland for the period⁷.

In the period 1st April 2015 – 31 March 2016, of those in training:

- 188 were aged 16-19 and of these, 105 (66%) were female
- 239 were aged 20-24 and of these, 129 (64%) were female
- 128 were aged 25+ and of these, 75 (59%) were female
- Customer Service apprentices represented between 2% of all Modern Apprenticeships in Scotland during 2013-2014 and

⁴ SDS, Modern Apprenticeships Breakdown by Age, Quarter 4, 2013-2014

⁵ SDS, Modern Apprenticeships Breakdown by Age, Quarter 4, 2014-2015

⁶ SDS, Modern Apprenticeships by Age, Framework and Gender, 2015-2016

⁷ SDS, Modern Apprenticeships by Age, Framework and Gender, 2015-2016

2014-2015 and 1% during 2015-2016. This demonstrates significant continuous demand from Scottish employers for the Customer Service Modern Apprenticeship frameworks.

In terms of previous data, during 2013-2014 there were 737 Customer Service Modern Apprentices (CSMA) in training compared to 367 CSMA's in training during 2015-2016. We believe the reduced numbers on the CSMA's is because of the reduction in funding for these frameworks.

Even with the funding issues for the CSMA's there is still substantial take up of the CSMA's in Scotland amongst Scottish employers.

Gender Profile of Customer Service Modern Apprentices

The results found in these statistics demonstrate that, although historically Customer Service has been seen as a female dominant occupation, just under a half of all Customer Service apprentices are male. The male/female split in the Customer Service Apprentices has been a consistent percentage over the last three years (58% of females and 42% of males in 2013-2014 with a slight increase in 2014-2015 and 2015-2016 with 56% female and 44% male). These results show that opportunities now exist for both males and females in Customer Service job roles. In contrast to the Customer Service framework, the majority of apprentices in Scotland across all MAs are male (70% in 2015-2016).⁸

Customer Service (CS) Modern Apprenticeships Achievement Data⁹

| | 2013-2014 | | | 2014-2015 | | | 2015-2016 | | |
|-------------------------|-----------|----------|--------------|-----------|----------|--------------|-----------|----------|--------------|
| | Starts | Achieved | Completion % | Starts | Achieved | Completion % | Starts | Achieved | Completion % |
| CS MA | 1130 | 1049 | 93% | 883 | 832 | 94% | 687 | 636 | 93% |
| National Average | 25284 | 20576 | 81% | 25247 | 19387 | 77% | 25818 | 19367 | 75% |

The table above shows that the number of starts on the Customer Service Modern Apprenticeship frameworks have decreased from 1130 starts during 2013-2014 to 687 starts during 2015-2016. As stated above, we believe the reduced number of starts on the CSMA framework is because of the reduction in funding for these frameworks.

The completion rate for the Customer Service Apprenticeships have seen a slight increase over the last three years from a completion rate of 93% in 2013-2014 and 2015-2016 to a completion rate of 94% in 2014-2015. Completion rates for the Customer Service Modern Apprenticeships are significantly higher than the national average completion rates for all Apprenticeships in Scotland, which have decreased over the last three years from a national average completion rate of 81% in 2013-2014 compared to a national average completion rate of 75% in 2015-2016, representing a 6% reduction.

⁸ SDS, Modern Apprenticeships by Age, Framework and Gender, 2015-2016

⁹ SDS, Modern Apprenticeships Breakdown by Age, Quarter 4, 2013-2014, 2014-2016, 2015-2016

Summary of Framework

Diagram showing the contents of the Modern Apprenticeship in Customer Service at SCQF Level 6.

Duration

The average duration of the apprenticeship is 12 months.

Mandatory outcomes

SVQ

One of the following must be achieved:

- SVQ in Customer Service at SCQF Level 6 GL7T 46 (City & Guilds)
- SVQ in Customer Service at SCQF Level 6 GL01 23 (Pearson Education)
- SVQ in Customer Service at SCQF Level 6 GL0D 23 (SQA)

Core Skills

- | | |
|--|--------------|
| • Communication | SCQF Level 5 |
| • Working With Others | SCQF Level 5 |
| • Problem Solving | SCQF Level 5 |
| • Information and Communication Technology | SCQF Level 5 |
| • Numeracy | SCQF Level 5 |

All Core Skills must be separately certificated.

Enhancements

Each Apprentice must achieve two additional units from any SVQ at SCQF Level 6.

Optional Outcomes

Additional SVQ Units/Qualifications/Training

Skills CFA encourages the achievement of additional awards, qualifications and training, where relevant.

The Framework

Duration

It is expected that apprentices following this framework will take on average 12 months to complete. This includes up to 20% of their time for off-the-job training. This would be either learning the knowledge parts of the qualification which would take place away from work or self-study.

Mandatory Outcomes

SVQ(s)/ CBQs

Each apprentice is required to achieve one of the following qualifications:

- SVQ in Customer Service at SCQF Level 6 GL7T 46 (City & Guilds)
- SVQ 3 in Customer Service at SCQF Level 6 GL01 23 (Pearson Education)
- SVQ 3 in Customer Service at SCQF Level 6 GL0D 23 (SQA)

All Scottish Modern Apprenticeships must contain a relevant Scottish Vocational Qualifications (SVQs) or Competency Based Qualifications (CBQs). SVQs and CBQs are work-based qualifications based on National Occupational Standards of competence drawn up by representatives from each industry sector. They are made up of units – normally between six and ten – which break a job down into separate functions reflecting the different kind of activities of a job. SVQs and CBQs are available at a range of levels – although most are at SCQF Levels 5, 6 and 7 (SVQ Level 2 and 3). When someone has achieved an SVQ or CBQ, there is a guarantee that they have the skills and knowledge needed to do their job.

Core Skills

Each apprentice is required to achieve the following core skills:

| | |
|--|--------|
| Communication | SCQF 5 |
| Working with others | SCQF 5 |
| Problem Solving | SCQF 5 |
| Information and Communication Technology | SCQF 5 |
| Numeracy | SCQF 5 |

All Core Skills must be separately certificated

Core Skills are skills and abilities which everyone needs in their work. This is true for every job in every workplace. Core Skills also feature in National Qualifications such as Standard Grades and Highers and from 2000, Scottish candidates have been issued with a Core Skills profile on their Scottish Qualifications Certificate. Candidates who have already been certificated as achieving Core Skills at the levels given above – either in the workplace or at school or college - do not need to repeat these Core Skills as part of the Modern Apprenticeship Framework.

Enhancements

The two enhancements shown below must be chosen for the SCQF Level 6 Customer Service Modern Apprenticeship.
Two additional units from any SVQ at SCQF Level 6.

Optional Outcomes

Skills CFA encourages the achievement of additional awards, qualifications and training, where relevant.

Registration and certification

This Scottish Modern Apprenticeship is managed by Skills CFA. The SSC is the first point of contact in Scotland for any enquiries in relation to the Framework. Contact details:

Skills CFA
Unit 110, Print Rooms
164-180 Union Street
London
SE1 0LH
info@skillscfa.org
Tel: 020 7091 9620

The SSC will register all Scottish Modern Apprentices undertaking this Framework. **All Modern Apprentices must be registered with the SSC within 4 weeks of starting their apprenticeship.**

Registration can be made by completing the Sample Training Plan and Sample Training Agreement in Appendix 3 and sending these to the above address or completing the online registration system (MA Online, www.maonline.org.uk).

Skills CFA will issue a Modern Apprenticeship Certificate of Completion to those Modern Apprentices who have completed the mandatory outcomes of the Framework. Before a certificate is issued, training providers must submit evidence to the SSC that the mandatory outcomes have been achieved. This will normally be in the form of photocopies of certificates from awarding bodies. Requests for registration and certification should be made to the SSC at the address above.

In the case of MAs which receive funding it is acceptable for the Skills Development Scotland Training Plan to be used on the condition that it includes all relevant information as set out in the MA Training Plan.

Requests for registration and certification should be made to the SSC at the address above.

SSC Service level

The SSC undertakes to confirm the registration of candidates in writing within 4 weeks of receipt of the relevant Training Plan and Training Agreement. Each candidate will be issued with a unique registration number.

The SSC also undertakes to issue Certificates of Completion within 4 weeks of receipt of the appropriate evidence that a candidate has completed the outcomes as stated in the Training Plan.

Recruitment and selection

The recruitment and selection of Modern Apprentices is primarily the responsibility of the employer. However, the following guidance is given:

- Employees may enter a Modern Apprenticeship from the age of 16. There is no upper age limit.
- The Modern Apprenticeship is designed to attract high quality people to the industry. Achievement of academic qualifications is one way of assessing the suitability of applicants. However it should be stressed that no persons should be deterred from applying for a Modern Apprenticeship because of a lack of formal educational qualifications. As well as traditional qualifications such as Standard Grades and Highers, employers should also be aware of newer vocational qualifications or vocational activity undertaken outwith an academic institutions, such as volunteering activity.
- The following factors may also influence the selection process:
 - performance during a formal interview process
 - references
 - relevant work experience
 - trial observation period.
- Employers should be aware of the nature, relevance and quality of foreign qualifications and make appropriate allowances concerning entry requirements.
- In order to promote and maintain the high status of the Modern Apprenticeship within the industry all literature distributed for recruitment purposes should emphasise the high standards of achievement expected of the candidate.
- Employers may wish to contact the SSC for advice and guidance on recruitment and selection.

There are no specific sectoral or cross sector requirements for entry on to the Customer Service Modern Apprenticeship Framework at SCQF Level 6.

Equal opportunities

Modern Apprenticeships should ensure that there is equality of opportunity for all and any barriers (real or perceived) are addressed to support anyone seeking to enter employment to undertake the Modern Apprenticeship.

All MAs supported by Skills Development Scotland must conform to any contractual requirements on equal opportunities. All employers of Modern Apprentices should have an Equal Opportunities policy statement.

Health and Safety

All aspects of health and safety at work must be recognised within the delivery of this Modern Apprenticeship Framework and all statutory requirements be adhered to. It is a key aspect of the induction period of the Modern Apprenticeship that apprentices are fully informed both of the regulations and that they and their employers are bound by these regulations. Modern Apprentices should be made aware of their rights and duties with regard to health and safety.

All Modern Apprentices supported by Skills Development Scotland will be required to satisfy the adequacy of SDS's Health and Safety policy and systems.

Contracts

The following three contracts are essential to the successful outcome of the Modern Apprenticeship programme:

1. Contract of employment signed by the employer and the Modern Apprentice.
2. SSC Training Agreement - this agreement outlines the basis of the modern apprenticeship, refers to the contract of employment and includes Health and Safety responsibilities. A sample SSC Training Agreement is set out in Appendix 3.
3. SSC Training Plan - this plan outlines the selected outcomes and the expected duration of the apprenticeship. In cases where funding is offered by SDS, the SDS Training Plan will be sufficient on condition that it contains all relevant information as set out in the Sample Training Plan at Appendix 3. Training Plans may be modified to reflect changing circumstances; however it is essential that the SSC is notified of any changes.

Employment status of Modern Apprentices

It is important that the sector offers genuine employment and career prospects to those people it wishes to attract through Modern Apprenticeships. Accordingly, **all apprentices must be employed.**

All Modern Apprentices must have a demonstrable need to acquire **significant new knowledge and skills** to fulfil their job role. The modern apprenticeship framework selected for the employee must be the most appropriate learning programme generally available to that individual, providing such knowledge and skills.

Terms and conditions of employment

In order to compete with other sectors offering Modern Apprenticeships, attractive packages will need to be developed by employers in the sector. The terms and conditions of employment for individual Modern Apprentices will be agreed between the employer and the apprentice and should form the contract of employment.

Training and development

Delivery

Training delivery can take many forms under the Modern Apprenticeship system. Some organisations may become approved SVQ Assessment Centres; others may join a consortium or use peripatetic assessors. Some large employers will be able to complete all the training and development in-house, but most employers will find that some of the training and development will have to take place away from the normal workplace. In particular the underpinning knowledge requirements are often more suited to delivery by outside training providers which might include:

- private training organisations
- colleges / universities
- other employers

Such knowledge could be delivered through training courses or through open/distance learning packages.

The option of sharing training and assessment resources amongst a cluster of employers (or across the divisions of a larger employer) will be particularly appealing to those firms which do not have the resources to provide all of the training and development. Assessment can be provided by these bodies, but the assessors and the training centre must be approved by the awarding bodies for the SVQ and Core Skills where appropriate.

List of Training Providers

| Existing Customer Service Centres December 2016 | |
|---|---------------------------------------|
| Aberdeen & Grampian Chamber of Commerce | Life Skills Centres Ltd |
| Angel Training | Limelight Careers Ltd |
| Angus Council | Lowland Training Services Ltd |
| Babcock Training Ltd | MGT Training Ltd |
| BT Group PLC | Microcom Training |
| Capita Talent Partnerships | Perth & Kinross Council |
| CEIS | Quest (Scotland) Ltd |
| Didac Ltd | Raytheon Systems Ltd |
| Direct Partners Ltd | Remit Scotland |
| Dumfries & Galloway College | Rewards Training - Glasgow |
| Fife College | South Ayrshire Council |
| First4Skills Ltd | SSVQ |
| Genius People | Strathearn Training |
| GTG Training Ltd | The Tell Organisation Ltd |
| IBM UK Ltd | Training Direct Ltd |
| Impact Results Ltd | Training for Travel Ltd - liquidation |
| Intec Business Colleges | Unique Solutions |
| Intraining Group Ltd | West College Scotland (Clydebank) |
| ITP Training Ltd | West College Scotland (Reid Kerr) |
| JMG Training and Development LTD | West Lothian College |
| Jobs & Business Glasgow | XL Training Ltd |
| Kwik Fit Financial Services | You Train Ltd |
| Learndirect (JHP) | |

Delivery of Training for the Modern Apprenticeship in Customer Service

Work-based training

Delivery and assessment method

Evidence generated at work by carrying out relevant tasks provides the most direct proof of competence. For this reason, the identification, generation and interpretation of such evidence is the primary method of assessment for the competency units.

The most effective way of assessing competence, is through direct observation of the learner. Assessors must make sure that the evidence provided reflects the learner's competence and not just the achievement of a training programme. Where observation is needed to obtain assessment evidence, this must be carried out against the competence unit assessment criteria. Best practice would require that such observation is carried out by a qualified Assessor. If this is not practicable, then alternative sources of evidence may be used.

It is recommended that a holistic approach to assessment is adopted and all evidence submitted by the learner wherever possible is assessed for more than one competence unit.

Please see Skills CFA Assessment strategy for more information.

Skills required by training providers delivering the training

Assessors

The primary responsibility of an Assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, Assessors must:

- be “occupationally competent”. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed;
AND ONE OF EITHER OF THE FOLLOWING
- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;
OR
- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period; AND have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

Internal quality assurer (IQA)

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQAs

IQAs must:

- be “occupationally competent”. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business;
AND ONE OF EITHER OF THE FOLLOWING
- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;
OR
- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA and should be supported by a qualified IQA throughout their training period; AND demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

Delivery of underpinning knowledge (if no formal off-the job requirement)

Delivery of underpinning knowledge is through the units that are within the Customer Service SVQ qualification.

Off-the-job training**Details of off-the-job training** (please state if not applicable)

Underpinning knowledge is achieved through the units that are within the Customer Service SVQ qualification (core and optional units). This component is not separately certificated, but certificated as a part of the overall SVQs.

Delivery and assessment method

The delivery and assessment of off-the-job training is flexible. The method used will be decided by the employer, the training provider and the apprentices, as part of the apprentice's individual training plan.

Exemptions

N/A

The SSC training plan

The plan is required to identify:

- 1 The selected Framework outcomes, specifying whether or not separate certification of the Core Skills is being sought.
- 2 A summary of the Modern Apprentices accredited prior learning
- 3 A timetable for achievement of the selected Framework outcomes, linked to regular progress reviews.

The Training Plan should take into account any relevant previous training and development, education or work experience. Not all Modern Apprentices need have different plans, but many will vary. Moreover as reviews take place and circumstances change so the plan itself can be modified.

However any changes must:

- be subject to the quality provisions of Skills Development Scotland (if the MA is being financially supported)
- comply with the stipulations of this Framework
- meet the needs of the employer and apprentice.

A sample Training Plan is provided at Appendix 3 of this document, however, for those Modern Apprentices funded by SDS area office it is sufficient to submit the Skills Development Scotland Training Plan on condition that it covers the same information required in the MA Training Plan.

Consultation Process

Skills CFA undertook a consultation with employers, training providers and other key stakeholders during November 2016 to review the current Customer Service Modern Apprenticeship (CSMA) frameworks. In particular, all of the mandatory outcomes of the CSMA frameworks, apart from the Customer Service SVQs, were reviewed to ensure they continue to meet employer's needs in Scotland, are fit for purpose and offer an up to date and relevant programme of qualifications and training for Scotland.

The survey has given employers, providers and other key stakeholders the opportunity to provide their feedback on the content of the revised Customer Service Modern Apprenticeships.

The Customer Service online Survey

Skills CFA developed an online Survey entitled 'Modern Apprenticeship Reviews 2016' and ran this from 2 November to 25 November 2016. It was a combined Business Administration/Customer Service survey with separate questions focusing on the BAMA and CSMA frameworks as a lot of the employers, training providers and key stakeholders are the same for both frameworks. We posted a link to the Survey via our twitter page that has over 3860 followers and included a link to the survey on the Skills CFA website. Various contacts in Scotland were also sent information on the review and were asked to share the link to the survey within their networks to ensure a significant number of employers in Scotland had the opportunity to participate in the CSMA review consultation process. In addition to that we sent a link to all employers on MA Online system delivering Customer service Modern Apprenticeships. Finally, we also sent a link to the survey to all of the current CSMA Centres (60) working with Skills CFA in Scotland and asked them to circulate the link to their employer contacts.

46 responses were received for the CSMA part of the survey, with 45 named individuals responding to the online survey. Skills CFA policy is to allow those who do not want to show participant details in the survey to remain confidential to Skills CFA only. Not all respondents answered every question, therefore the total number of respondents (TNR) will vary for each question. Please note we are sharing the names of organisations that participated in the survey in confidence with the Modern Apprenticeship Group.

Main Headline Results of CSMA Survey

- 51% of responses were from employers or employers who are also training providers
- 45% of responses were from micro or small organisations, 32% from large organisations and 20% from medium sized organisations
- 63% of responses to the CSMA survey were from the private sector, 19% were from public sector and 19% were from voluntary/charity organisation
- Organisations across a range of sectors took part in the survey, including Financial, insurance & other professional services (29%); Construction, Building services, engineering and planning (14%); Education (14%); Food service management and Facilities Management (14%); Hospitality, tourism and sport (14%); Wholesale and retail trade (14%)
- All Scottish regions were represented in the consultation
- 79% of those who responded have used the Customer Service MA frameworks before
- 97% of respondents agreed that the customer service qualifications help to raise customer service levels within their organisations and improve the Scottish economy
- 97% of respondents agreed with the proposed to keep the core skills at the same levels in the revised CSMA for both frameworks (all Core Skills at SCQF Level 4 for the CSMA at SCQF Level 5 and all Core Skills at SCQF Level 5 for the CSMA at SCQF Level 6)

- 91% and 83% of respondents think that the mandatory enhancements should remain the same in the CSMA at SCQF Level 5 and 6

MA Review Webinar – December 2016

We invited employers, training providers and other key stakeholder to a webinar to discuss any questions they had on the outcomes of the Business Administration and Customer Service MA reviews. The webinar was held on 1 December 2016.

The following people participated in the webinar:

- Skills CFA (webinar host and presenter)
- City & Guilds
- SQA Awarding Body
- Tell Organisation
- Learn Direct

The Agenda for the MA Review Webinar was as follows:

- Welcome and Introductions
- Overview of Modern Apprenticeships, the CS reviews and the review process
- Presentation and discussion on proposed changes to CSMA frameworks
- Actions and next steps
- Any other business

Engagement of Scottish Trade Unions

We have engaged and consulted the Scottish Trades Union Congress (STUC) in the CSMA review, as follows:

- We sent a copy of the survey link to the STUC and asked for this to be forwarded to trade unions in Scotland. We also had a separate discussion with the STUC representative, during which, they confirmed that MA review survey link had been shared with other trade unions in Scotland.
- We have invited the STUC to share any concerns they have regarding the reviews and have not received any feedback that they have concerns

Key Findings – Mandatory Outcomes

Customer Service SVQs

We did not consult on the Customer Service SVQs in the framework review.

Removal of Contact Centre Pathway within revised CSMA

Due to there being no demand for the Contact Centre SVQs and the current Contact Centre SVQs lapsing on the 31 March 2017, we will be removing the Contact Centre pathway from the revised Customer Service Modern Apprenticeship frameworks. We have consulted with SQA Awarding Body and we are proposing an operation start date of 1 April 2017 for the revised CSMA frameworks. This will give Skills CFA and SQA Awarding Body sufficient time to communicate the removal of the Contact Centre pathway within the revised CSMA frameworks to employers and training providers. However as there has not been any starts on the Contact Centre SVQs during 2015-16 (financial year), we don't think there are any training providers currently delivering the Contact centre pathway and therefore the removal of this pathway will not have any adverse effect on employers, apprentices or training providers.

Core skills

Skills CFA have consulted on the Core Skill levels within the SCQF Level 6 CSMA framework. The majority of employers and key stakeholders consulted agree that the Core Skills within the CSMA framework should remain the same. Therefore, the Core Skills in the revised CSMA framework at SCQF Level 6 will be set at the following levels:

- Communication at SCQF Level 5
- Numeracy at SCQF Level 5
- Information and Communication Technology at SCQF Level 5
- Problem Solving at SCQF Level 5
- Working with Others at SCQF Level 5

Enhancements

83% of those who responded should think that mandatory enhancements should remain the same for the CSMA at SCQF level 6.

Therefore the mandatory enhancement profile will remain the same within the revised SCQF level 6 CSMA framework.

Career progression

Following completion of the Modern Apprenticeship, candidates should be able to achieve positions in areas such as:

Job Titles in Customer Service at SCQF Level 6

Following completion of the Modern Apprenticeship at SCQF Level 6, candidates should be able to achieve positions in areas, such as Customer Service or Contact Centre Operations:

- Customer Relationship Manager
- Customer Support Agent
- Customer Support Officer
- Customer Service Executive Officer
- Customer Service Delivery Co-ordinator
- Customer Service Operator
- Customer Service Team Leader
- Customer Service Supervisor
- Customer Service Manager
- Senior Customer Service Advisor
- Customer Relations Officer

Progression and the fit with other Frameworks

As the Customer Service Modern Apprenticeship at SCQF Level 6 involves customer service generic and transferable skills there are numerous avenues through which individuals may progress, as follows:

- into an enhanced job role using the skills developed through the Modern Apprenticeship as the foundations on which to build
- into sector specific job roles which contain elements of transferrable contact centre or customer service

skills, potentially including the undertaking of additional sector specific vocational qualifications or Modern Apprenticeships

- into employment in local councils where Customer Service Professional Qualifications are offered that are known as 'Customised Awards' and can be a stepping stone for apprentices who have completed their framework and want to find employment

Appendices

APPENDIX 1

Stakeholder Responsibilities

Many organisations and individuals share the responsibility for ensuring that the Modern Apprenticeship programme is implemented to the highest possible standard. They include:

- Awarding Bodies
- Employers
- Modern Apprentices
- Modern Apprenticeship Group (MAG)
- Sector Skills Councils (SSCs)
- Skills Development Scotland
- Training Providers

Role of the Sector Skills Councils

SSCs are responsible for developing Modern Apprenticeship Frameworks and are required to work with employers in their sectors to ensure that all Frameworks meet the needs of employers in their sectors.

For details on your sector's SSC, follow the link to the Federation for Industry Sector Skills and Standards website <http://fisss.org/>.

Role of Skills Development Scotland (SDS)

MA frameworks are used by employers as part of their workforce development to train new employees and up-skill existing members of staff. They can be (and often are) used regardless of whether financial support is available from the delivery body who currently provides a 'contribution' towards the cost of delivery. However, only approved MA Frameworks will be eligible for funding support from Skills Development Scotland who should be contacted to establish the availability and level of support for each MA Framework.

Further information is available from: <http://www.skillsdevelopmentscotland.co.uk/our-services/modern-apprenticeships.aspx>

SDS provides advice and guidance to individuals on the range of Modern Apprenticeships and training providers available. Individuals are signposted to opportunity providers who offer training in the vocational areas of interest.

Responsibilities include:

- Supporting the Modern Apprentice with ongoing Career Planning advice
- Signposting candidates to suitable vacancies
- Promoting the Modern Apprenticeship route on the Skills Development Scotland website
- Facilitating recruitment events that bring together jobseekers and opportunity providers

Role of the Awarding Bodies

A significant proportion of the Modern Apprenticeship is based on the assessment of the apprentice against SVQs/ CBQs or SVQ/ CBQ units. These qualifications are accredited by the SQA Accreditation and the Office of the Qualifications and Examinations Regulator (Ofqual) and are offered by Awarding Bodies.

It is the responsibility of the Awarding Bodies to ensure that centres are approved, that assessors and verifiers are suitably qualified, trained and monitored, and that all of the assessment criteria of the SVQs/ CBQs and SVQ/CBQ units are fully met.

Role of the Training Provider

The role of the training provider is important to the success of the Modern Apprenticeship. A training provider can be a further education college, a private or voluntary training company or in some cases the employer themselves or employer partnerships.

Training Providers are responsible for:

- Confirming an appropriate MA programme for candidates
- Agreeing the training needs of the candidates
- Agreeing roles and responsibilities for on the job training
- Agreeing where off the job training will be required and defining roles and responsibilities for this with relevant parties
- Ensuring trainee/candidate has access to the best quality training opportunities available
- Ensuring that the Modern Apprentices and employers fully understand the principles and processes of competence-based assessment
- Registering of MA candidates with the relevant SSC (and Skills Development Scotland if appropriate).
- Compiling and agreeing assessment schedules/assessment plans
- Judging performance evidence
- Completing assessment records
- Reviewing candidates progress at regular intervals
- Submitting records and evidence for moderation
- Advising the Modern Apprentice who to approach for support, advice, encouragement and in case of complaint

Role of the Modern Apprenticeship Group (MAG)

MAG is an independent group drawn from key stakeholders involved in the management and delivery of the Apprenticeship programme in Scotland.

MAG is responsible for:

- Approval and re-approval of Modern Apprenticeship Frameworks
- De-approval of Modern Apprenticeship Frameworks
- Encouraging best practice across Modern Apprenticeship Frameworks and sectors

Role of the Employer

Employers' responsibilities include:

- Paying all Modern Apprentices in accordance with company policy and in line with current legislation
- Agreeing roles and responsibilities for on the job training
- Agreeing where off the job training will be required and define roles and responsibilities for this with relevant parties
- Highlighting opportunities for the Modern Apprentice to demonstrate competence
- Meeting with Trainers, Assessors, Verifiers and the Modern Apprentices to review progress
- Witnessing candidate performance and verifying evidence

- Releasing Modern Apprentices for college/off-the-job training in line with training plan
- Ensuring the experience, facilities and training necessary to achieve the outcomes of the training plan.
- Supporting and encouraging Modern Apprentices and rewarding achievement
- Taking responsibility for the Health & Safety of Modern Apprentices.

Role of the Modern Apprentice

Modern Apprentices have the same responsibilities to their employer as any other employee. In addition they have a range of commitments to their training programme.

Modern Apprentices' responsibilities include:

- Observing the company's terms and conditions of employment
- Agreeing a training/development plan with all parties involved
- Undertaking development in line with agreed training plan
- Attending meetings with trainers, assessors and verifiers as required
- Attending college/off-the-job training where required
- Providing evidence of competence
- Developing a collection of evidence (portfolio) and retain ownership of this throughout
- Behaving in a professional manner throughout

APPENDIX 2

Modern Apprenticeship Centres (MACs)

Modern Apprentices may only be registered through organisations approved by the SSC to deliver this Framework. Such approved organisations are called Modern Apprenticeship Centres (MACs)

The MAC may be the employer of the apprentice or a separate organisation such as a training provider, further education college, a private or voluntary training company or in some cases the employer themselves or employer partnerships.

In order to be approved, organisations must make a formal application to the SSC, seeking approval and establishing that the centre satisfies the following criteria:

Either

- 1 be approved by an appropriate Awarding Body as a centre for the assessment of the relevant SVQ/ CBQ (and Core Skills if these are being separately certificated)

or

- 2 be capable of demonstrating a contractual relationship with another approved centre for the assessment of those units for which the MAC does not have approval from an appropriate Awarding Body.

In addition

The SSC will maintain a database of MACs for the delivery of the Framework within Scotland, which will be available to employers and others.

Organisations wishing to become MACs who have yet to obtain the necessary Awarding Body approval for assessment should first contact the Awarding Body direct.

Organisations wishing to be accredited with SQMS (or other appropriate quality system) should contact Skills Development Scotland.

In addition to the assessment of the Modern Apprentice against the relevant standards set by the selected Framework outcomes, the MAC has responsibility for:

- Entering into a formal training agreement with the employer and Modern Apprentice
- Registering Modern Apprentices as candidates for the relevant SVQ/ CBQ (s) and other selected units with the appropriate Awarding Body
- Registering Modern Apprentices with the SSC
- Applying for the final 'Certificate of Completion' on behalf of Modern Apprentices
- Informing the SSC of any material alterations to Modern Apprentices' training plans or desired changes to the selected Framework outcomes.

APPENDIX 3



MODERN APPRENTICESHIP SAMPLE TRAINING AGREEMENT

This Training Agreement is entered into by:

| | |
|--|--|
| Name of Employer: | |
| Name of Modern Apprentice: | |
| Name of Modern Apprenticeship Centre: | |

The **Employer’s responsibilities** are to:

- 1 employ the modern apprentice subject to the employer’s usual terms and conditions of employment;
- 2 provide the modern apprentice with the facilities, training and work place opportunities necessary to achieve the selected Framework outcomes specified in the apprentice’s personal training plan;
- 3 pay the modern apprentice an agreed salary which reflects the obligations of the employer and the opportunities for the apprentice;
- 4 in the event of the employer becoming unable to retain the modern apprentice after completion of the apprenticeship, to use reasonable endeavours to secure employment elsewhere;
- 5 in the event of the apprenticeship being terminated prematurely by either the employer or modern apprentice for any reason other than dismissal for unsatisfactory performance or misconduct, to use reasonable endeavours to secure employment and continuation of this apprenticeship elsewhere;
- 6 operate a formal Health and Safety policy and undertake the necessary legal and contractual responsibilities for health and safety of the modern apprentice; and
- 7 operate an Equal Opportunities policy which meets all legal requirements.

The **Modern Apprentice’s responsibilities** are to:

- 1 work for the employer in accordance with the agreed terms and conditions of employment;
- 2 undertake training, attend courses if required, keep records, and take assessments to be determined by the employer and/or Modern Apprenticeship Centre, and carry out such work as may be required in order to achieve the selected Framework outcomes specified in the apprentice’s personal training plan;
- 3 be diligent, punctual, behave in a responsible manner and in accordance with the requirements of Health and Safety legislation relating to the apprentice’s responsibilities as an individual; and
- 4 promote at all times the employer’s best interests.

The **Modern Apprenticeship Centre’s responsibilities** are to:

- 1 agree the content of the modern apprentice’s personal training plan as confirming that the selected Framework outcomes and training plans meet the criteria of this modern apprenticeship
- 2 contract with the employer to provide the training and assessment necessary to enable the modern apprentice to achieve the selected Framework outcomes specified in the apprentice’s personal training plan; and
- 3 use its best endeavours to ensure that the employer provides the modern apprentice with the facilities, training and work place opportunities necessary to achieve the selected Framework outcomes specified in the apprentice’s personal training plan.

This agreement to be signed by all parties:

| | | |
|-------------------------------------|--|--------------|
| Employer | | Date: |
| Modern Apprentice | | Date: |
| Modern Apprenticeship Centre | | Date: |



MODERN APPRENTICESHIP TRAINING PLAN

The Modern Apprenticeship Centre

| |
|------------|
| Name: |
| Address: |
| Telephone: |
| Contact: |

The Modern Apprentice

| |
|----------------|
| Full name: |
| Home address: |
| Work address: |
| Date of birth: |

The Employer

| |
|------------|
| Name: |
| Address: |
| Telephone: |
| Contact: |

Skills Development Scotland office

| |
|------------|
| Name: |
| Address: |
| Telephone: |
| Contact: |

Framework selected outcomes

Mandatory outcomes

| SVQ/ CBQ Level (please identify level) <i>(List mandatory and optional units)</i> | | Tick units being undertaken | SCQF Level | SCQF Credit Points |
|---|--|------------------------------------|-------------------|---------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| SVQ/ CBQ level (please identify level) <i>(List mandatory and optional units)</i> | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Enhancements | | | | |
| | | | | |
| | | | | |

| Core Skills <i>(Include details of the minimum level required)</i> | | Tick units being undertaken | SCQF Level | SCQF Credit Points |
|--|--|------------------------------------|-------------------|---------------------------|
| 1 | Communication | | | |
| 2 | Working with others | | | |
| 3 | Numeracy | | | |
| 4 | Information and communication technology | | | |
| 5 | Problem Solving | | | |

Optional outcomes

| Additional units (if any) <i>These are optional and should reflect the individual training needs of the Apprentice</i> | | Tick units being undertaken | SCQF Level | SCQF Credit Points |
|--|----------------|------------------------------------|-------------------|---------------------------|
| | (specify unit) | | | |

Summary of Modern Apprentice’s accredited prior learning:

If you require assistance in completing this form, please contact:

Skills CFA
Unit 110, Print Rooms
164-180 Union Street
London
SE1 0LH
info@skillscfa.org
Tel: 020 7091 9620