Education & Skills
Funding Agency

Funding calculation for young people 2017 to 2018

Technical specification v1.0

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Purpose

The purpose of this document is to show, at technical implementation level, the specification behind the Education and Skills Funding Agency (ESFA) funding calculation for young people for the academic year 2017 to 2018.

The 2017/18 funding calculation has been created using Oracle Policy Modelling (OPM) technology. OPM builds business rules in the form of a rule base which is then deployed using the Oracle Policy Automation (OPA) engine.

This document contains the OPA rule base source documents for the ESFA funding for young people calculation used by the Funding Information Service (FIS).

A key benefit of OPM is that the rule base uses a ‘natural language’ form which means that the rules themselves (which previously would have been written in a programming language such as C#.net) can be presented as technical guidance documentation and understood by people with little or no IT development experience.

This document has 4 sections:

The first section provides a description of each element of the ESFA funding for young people formula around which the calculation is based.

The second section is a crib sheet, a guide for readers on how to understand and interpret the structure and the format of OPM rules.

The third section is the Interface Agreement which details the inputs, interim variables and outputs used by the ESFA rule base for young people in a tabular format.

This includes the ‘public names’ for attributes that are used when interfacing with the rule base, which are most similar to the field names used in the FIS database, as well as the ‘natural language names’ used in the rule documents themselves, and can aid the reader in reconciling the outputs of the rules with the data seen in the FIS.

Finally, section 4 details the business rules that define the ESFA funding calculation for young people. There is commentary throughout in addition to the information in the crib sheet which is intended to help the reader interpret the rules.

Section 1: The ESFA funding formula for young people

(Student numbers × National funding rate per student × Retention factor × Programme cost weighting + Disadvantage funding + Large programme uplift) × Area cost uplift = Total programme funding

This section aims to describe each element of the funding formula as it pertains to the ESFA funding for young people calculation.

The principles outlined in the *Funding guidance for young people 2017/18* are reflected in the 2017/18 funding calculation and it is important to note that, as in previous years, both historic and in-year elements are used to calculate funding.

A number of the data items returned in your 2017/18 data will not be directly used in the calculation of funding for the 2017/18 academic year but will be used in determining critical elements of your 2019/20 allocation. To this end the funding calculation also outputs some future variables to help illustrate how this data might impact your 2019/20 allocation and this section will indicate where this is the case.

The outputs of the 2017/18 funding calculation may be used to determine aspects of forward allocations. Which, if any, elements are used and how they will be used will be determined during the course of the development of the 2018/19 allocations methodology.

Student Numbers

This is the count of valid students from your current year's data, split into Full Time and Part Time bandings.

Bandings are based on the sum of the two fields ***Planned learning hours*** and ***Planned employability, enrichment and pastoral hours*** recorded in your 2017/18 data. Table 1 details the hour ranges for each band.

National Funding rate per student

This is the base funding rate per student and is determined using the Full Time/Part Time bandings described above. Table 1 details the National Funding Rate for each Full Time/Part Time band.

Table 1 – National rate per band

Band	Annual timetabled hours		National funding rate per student
5	540+ hours	16 and 17 year olds Students aged 18 and over with high needs	£4,000
4a	450+ hours	Students aged 18 and over who are not high needs	£3,300
4b	450 to 539 hours	16 and 17 year olds Students aged 18 and over with high needs	
3	360 to 449 hours		£2,700
2	280 to 359 hours		£2,133
1	Up to 279 hours		£4,000 per full time equivalent (FTE)

Qualifying period to count as a start

The planned programme length is determined using the earliest start date and latest planned end date of all aims within a study programme. Similarly, the actual length used to determine whether or not the student has met the qualifying period uses the earliest start date and latest actual/planned end date of all aims within a study programme.

Table 2 – Criteria to count as a start

Study programme planned hours and planned length in-year		Qualifying Period
450 hours or more		6 weeks (42 days)
	>= 24 weeks	6 weeks (42 days)
	2 to 24 weeks	2 weeks (14 days)

Retention Factor

The Retention Factor is an institution level factor calculated from your 2015/16 data. It is provided to the funding calculation by means of a reference data lookup which is updated

by the Education and Skills Funding Agency (ESFA) based with the factors used in your funding allocation.

Retention is calculated using the individual student's core aim and differs depending on whether or not the student's programme is Academic or Vocational.

The retention factor is the average of the funding percentage for each student which is determined by the student retention status (see table 3).

Table 3: Funding for withdrawing students

Student's completion status	Percentage of annual funding earned
Student leaves before qualifying period	0%
Student leaves and is not recorded as completed	50%
Student retained and is recorded as completed	100%

For vocational programmes, the student retention status is determined by the completion status of the core aim. Academic programmes are slightly different in that retention will be based on the core aim unless it is not retained and another (non-core) aim in the student's programme is, in which case the retained aim will be used.

A future Retention indicator (calculated from your 2017/18 data) will be output by the funding calculation for your information. Owing to the nature of retention this element will be more meaningful toward the end of the year where the completion status of students becomes final.

Programme Cost Weighting

The programme cost weighting factor is an institution level factor calculated from your 2015/16 data. It is provided to the funding calculation by means of a reference data lookup which is updated by the Education and Skills Funding Agency (ESFA) with the factors used in your funding allocation.

The programme cost weighting factor is calculated as a weighted average of each students programme cost weighting (which is derived from the core aim and whether a student's programme is academic or vocational) from your 2015/16 data.

Where a student's programme is academic the programme cost weighting is set to 1.

Where a student's programme is vocational the programme cost weighting is determined by the Tier 2 Sector Subject Area of the core aim. Each Tier 2 Sector Subject Area is assigned a weighting (these can be found in Annex 1).

A future version of your Programme Cost Weighting will be output by the funding calculation for your information.

Disadvantage Funding

Disadvantage funding is calculated in 2 blocks from your 2015/16 data:

Block 1 – Economic Deprivation

This is a factor calculated using a weighted average of each student's disadvantage uplift (based on the Indices of Multiple Deprivation 2015) derived from their home postcode from your 2015/16 data. This is then multiplied by the first 4 elements of the formula (student numbers x national funding rate per student x retention x programme cost weighting) to calculate a cash amount.

For further information and to download postcode uplift data, visit the data service website:

https://www.gov.uk/government/publications/uplift-factors-and-postcode-files

A future version of your Disadvantage Block 1 factor (not cash) will be output by the funding calculation for your information.

Block 2 – Prior Attainment

The block 2 element of disadvantage is calculated as a number of instances of students at your institution in your historic data who have not achieved GCSE grades A* to C or grades 4 to 9 in English or Maths at the end of year 11.

These instances are then divided by the total number of students for your institution in that year to give a proportion which is then multiplied out by your 2016/17 Student numbers and split between full time and part time.

Full time students are multiplied by a rate of £480 and part time students are multiplied by a rate of £292 to produce a cash amount.

To make the disadvantage element of the funding calculation proportionate to the delivery in 2017/18, it is represented as a percentage calculated as the total Block 1 and Block 2 elements of your 2017/18 allocation as a proportion of the total programme funding (less disadvantage and before area cost) from your 2017/18 allocation. This percentage is then applied to each student's funding as an uplift (DisadvantageProportionHistoric). Please note that as this factor is calculated using

funding elements from your allocation, in-year changes to your allocation are likely to change the disadvantage proportion which will feed through to the funding calculation.

Large Programme Uplift

The large programme uplift reflects that some study programmes are necessarily much larger than 600 hours.

The large programme uplift is by exception and is only available for high quality study programmes providing students with substantial stretch and challenge.

To make the large programme uplift element of the funding calculation proportionate to the delivery in 2017/18, it is represented as a percentage calculated as a proportion of the total programme funding (less large programmes and before area cost) from your 2017/18 allocation. This percentage is then applied to each student's funding as an uplift (HistoricLargeProgrammeProportion). Please note that as this factor is calculated using funding elements from your allocation, in-year changes to your allocation are likely to change the large programme uplift proportion which will feed through to the funding calculation.

Area Cost Factor

The Area Cost Factor is an institution level factor calculated from your 2015/16 data. It is provided to the funding calculation by means of a lookup which is updated by the Education Funding Agency based on the factors used in your funding allocation.

A full list of Area costs can be found at Annex A.

Funding conditions on provision of English and mathematics

English and maths at GCSE are essential qualifications for further or higher education and employment. Students who have not achieved a GCSE grade A*-C, GCSE 9 to 4 or equivalent qualification in these subjects by age 16 will be expected to continue to study towards achieving them as a part of their 16-19 study programme. This is now a condition of funding.

To comply with the condition of funding all full time students starting their study programme who have a grade D or grade 3 GCSE or equivalent in maths and/or English must be enrolled on a GCSE qualification in maths and/ or English. Stepping stone qualifications will not meet the condition of funding for these students. Full time students are those on a study programme of at least 540 planned hours if age 16 to 17 or at least 450 hours if aged 18 and not identified as having high needs (i.e. in receipt of element 3 top up funding from local authorities).

Part time students (that is those on a study programme under 540 hours if aged 16 or 17 or 18 and over with high needs, or those on a study programme under 450 hours if aged 18 and over and not high needs) who have a grade D or grade 3 GCSE or equivalent in maths and/ or English can undertake approved stepping stone qualifications in order to meet the condition of funding.

Funding is not adjusted in the 2017/18 ESFA funding calculation for young people as a result of the condition of funding, rather the prior attainment and in-year study of English and mathematics of each student in 2017/18 data will affect the allocation of each institution for 2019/20.

To aid institutions in identifying students who do not meet the condition of funding, the funding calculation uses the Learner EngGrade and MathGrade alongside the *EFAConFundEnglish* and *EFAConFundMaths* validity categories in LARS and MCF and ECF exemption codes to set out each student's GCSE English and mathematics status as follows (a student not meeting the condition in either category will not meet the overall condition of funding):

Mathematics	
Has Maths, Studying Maths	Meets condition for Mathematics
Has Maths, Not studying Maths	Meets condition for Mathematics
Doesn't have Maths, Studying Maths	Meets condition for Mathematics
Exempt from the GCSE Mathematics A*-C or 9 to 4 requirement	Meets condition for Mathematics
Condition of Funding Does Not Apply	Is not required to meet the condition for Mathematics
Has Maths GCSE Grade D or Grade 3, Not studying GCSE Maths	Doesn't meet condition for Mathematics
Doesn't have Mathematics, Not Studying Mathematics	Doesn't meet condition for Mathematics

English	
Has English, Studying English	Meets condition for English
Has English, Not studying English	Meets condition for English
Doesn't have English, Studying English	Meets condition for English
Exempt from the GCSE English A*-C or 9 to 4 requirement	Meets condition for English
Condition of Funding Does Not Apply	Is not required to meet the condition for English
Has English GCSE Grade D or Grade 3, Not studying GCSE English	Doesn't meet condition for English
Doesn't have English, Not Studying English	Doesn't meet condition for English

Further information pertaining to the condition of funding on maths and English can be found on the Department for Education website:

https://www.gov.uk/government/publications/maths-and-english-conditions-of-funding-post-16

Section 2: Oracle Policy Automation

Rules document crib sheet

What is a rule?

A **rule** is an assertion that a conclusion can be drawn from a particular state of affairs. For example:

> If you leave the ice cream in the sun, then the ice cream will melt.
>
> Full-time students and pensioners are eligible for a discount at the university bookstore.
>
> Your plane can take-off from the airport if it has permission from the control tower and has completed a safety check.

Rules operate on data and can incorporate operations such as comparisons and mathematical functions.

What is a rule base?

A **rule base** is simply a collection of one or more connected rules. For example:

Rule 1:

> the person is eligible for a discount at the university bookstore if
>
> the person is a full-time student or
>
> the person is a pensioner

Rule 2:

> the person is a full-time student if
>
> the person is studying a full-time load and
>
> the person does not have a full-time job

Conclusions and conditions

Each rule must have a **conclusion** (the state of affairs that can be determined) and usually has at least one **condition** (the conditions upon which that determination may be made). A conclusion is the "Then" part of an "If... Then..." statement. A condition is the "If" part of an "If... Then..." statement.

> CONCLUSION: the ice-cream will melt if
>
> CONDITION: the ice-cream has been left in the sun
>
> CONCLUSION: the person is eligible for a discount at the university bookstore if
>
> CONDITION: the person is a full-time student
>
> CONDITION: the person is a pensioner
>
> CONCLUSION: your plane can take-off from the airport if

CONDITION: it has permission from the control tower

CONDITION: it has completed a safety check

What is an attribute?

An attribute is a single unit of data or fact. For example:

- the person is a full-time student
- the ice-cream has been left in the sun

An attribute is of a particular data type: boolean, text, number, currency, date, time of day, or date and time. Boolean attributes can either have a true or false value, and variable attributes take a text, number, currency, date, time of day, or date and time value depending on the type of variable.

The following are some examples of attributes and types:

- the person is hungry (boolean attribute)
- the person's name (variable attribute – text)
- the person's date of birth (variable attribute – date)
- the number of cookies the person wants to eat (variable attribute – number)
- the cost of the person's meal (variable attribute – currency)

Attributes form the building blocks of rules.

Connecting conditions using and/or

Where a rule contains multiple conditions, the conditions must be separated by an **and** or an **or** to indicate whether one or all conditions are required to satisfy the conclusion.

For instance,

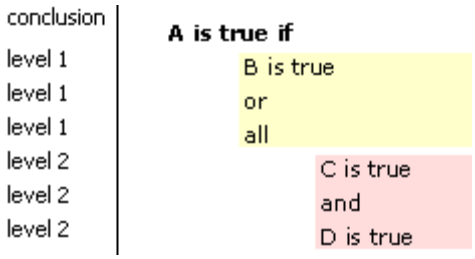
Example 1	Example 2
the person is eligible for a pension if:	the person is eligible for a pension if:
the person is over 65.	the person is over 65.
AND	OR
the person is a citizen.	the person is unable to work.

In Example 1, both conditions must be true to be able to draw a positive outcome for the person's eligibility. If either condition is false, then only a negative outcome can be drawn.

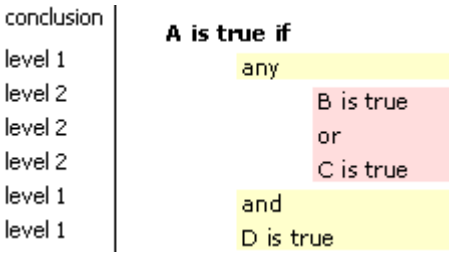
In Example 2, either the first or second condition, or both, must be true to be able to draw a positive outcome. If both the conditions are proved false, then a negative outcome is drawn.

Grouping conditions using both/all and either/any

The **all** operator is used to group conditions separated by **and**. In the example "A if B or (C and D)" the brackets are around the conditions joined by an **and** so you must use the **all** operator in your rule:



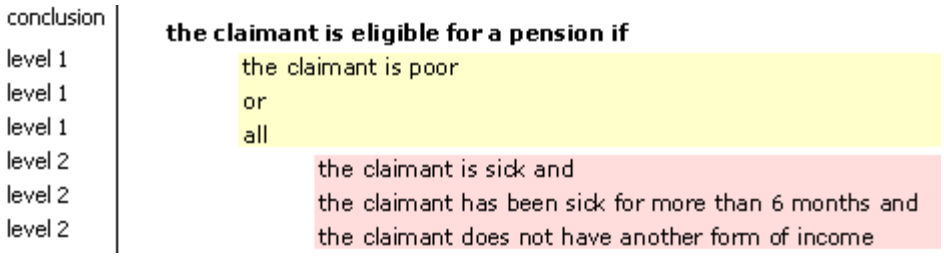
The **any** operator is used to group conditions separated by **or**. In the example "A if (B or C) and D" the brackets are around the conditions joined by an **or** so you must use the **any** operator in your rule:



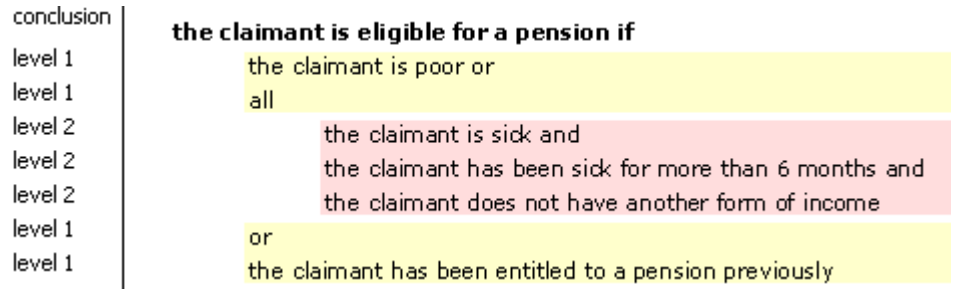
NOTE: You may also use the word **both** in place of **all** and **either** in place of **any**. Using these words has the same effect but may make the text more readable where only two conditions are grouped.

The grouping operators sit above the conditions they are grouping. The conditions being grouped sit beneath the grouping operator and should therefore take the style of the next level down. For example, if the word "any" is in **Level 1** style, the conditions it is grouping should be in **Level 2** style.

The following example demonstrates this placement:



Where your rule continues (as in the example below) at the higher level, the appropriate operator (**and** or **or**) should be added as a separate line at the same level as the subsequent condition. For example:



Alternative conclusions

By default, Oracle Policy Modelling assumes all rules contain an **alternative conclusion**. That is, if the conditions are not satisfied, you can infer the opposite of the conclusion. For example, given the rule:

CONCLUSION: it is a good idea to take an umbrella if

CONDITION: it is raining outside

If it is not raining outside, you may conclude that it is not a good idea to take an umbrella.

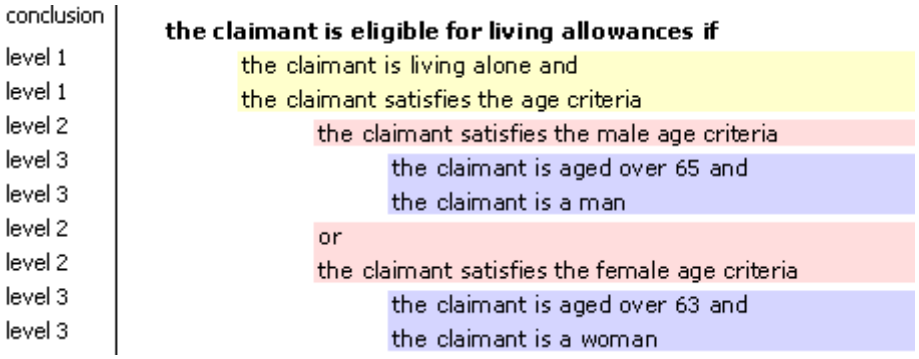
The alternative conclusion need not be stated, it is assumed in all rules unless otherwise indicated.

Understand Oracle Policy Modelling format and structure

Oracle Policy Modelling format is quite strict in order to maintain consistency and completeness of rules and to avoid logical ambiguity. In particular, styles and indentation play an important role in recognizing the meaning of rules. Indentation and styles are used to separate the conditions from the conclusion, and conditions of different levels from each other. Distinct conditions are separated onto different lines, and the placement of **and** and **or** between conditions has special significance.

Rules are marked up in Word using Oracle Policy Modelling styles. Each style has a unique style name and colouring to make it easy to identify.

The rule below shows an example of how a rule would be formatted in Word using Oracle Policy Modelling document styles:



Rule tables in Word documents

In many cases it is more efficient to use rule tables for expressing logic, especially where there is an implied order of logic and/or you need to make sure a conclusion is always reached.

The following diagram shows how a rule table is structured:

attribute to be set (conclusion)	
value if	premise
value if	premise
...	...
value	otherwise

The first row of the table defines which variable or statement will be used as the conclusion attribute for the rule.

The left hand column is used to specify values (includes mathematical expressions) which will set the value of the conclusion attribute if the condition in the right hand column of the same row equates to true.

The final row provides an alternative conclusion, to which the conclusion will be set if all of the conditions equate to false.

In other words:

B

C	A
E	D
F	**Otherwise**

would mean 'If A is true then B is set to C, otherwise if D is true then B is set to E, otherwise B is set to F'.

Rule tables operate from top to bottom, with an implicit 'otherwise' between each row. So the conclusion is set based on the first condition that is proved to be true and the rule exited at that point (without assessing any of the conditions in the rows below). Therefore the order of the rows in rule tables is important.

Uncertain vs Unknown

We use 'uncertain' as well as 'unknown' in rule bases and it is important to understand the difference between the two.

An attribute is unknown if it has simply not been provided (or in the context of an interview, the question has not yet been asked).

An attribute is uncertain if some or all of the information necessary to prove a conclusion has been provided but the conclusion can still not be determined.

The following truth tables show how uncertainty works with **and** and **or** statements:

P	Q	P AND Q
TRUE	UNCERTAIN	UNCERTAIN
UNCERTAIN	TRUE	UNCERTAIN
FALSE	UNCERTAIN	FALSE
UNCERTAIN	FALSE	FALSE
UNCERTAIN	UNCERTAIN	UNCERTAIN

P	Q	P OR Q
TRUE	UNCERTAIN	TRUE
UNCERTAIN	TRUE	TRUE
FALSE	UNCERTAIN	UNCERTAIN
UNCERTAIN	FALSE	UNCERTAIN
UNCERTAIN	UNCERTAIN	UNCERTAIN

Determining whether an attribute's value is certain or known

The known and certain operators are used on rule conditions and cause the condition to evaluate a predictable way when the underlying attribute in the condition has a particular value:

The **uncertain** operator causes the condition to return true only if its value is uncertain. A condition using the uncertain operator returns false if the underlying value is not uncertain.

The **known** operator is commonly used in procedural rules that drive an investigation. For example, forcing attributes to be known in a particular order before determining a goal.

The **currently known** operator is used to test whether an attribute is known, without causing it to be brought up in the question search and asked of the user, i.e. it will test the *current* state of the attribute. It is used a lot where the rule base runs off data (rather than an interactive interview) where the data may or may not be provided, and the fact that a piece of data has not been provided has meaning (e.g. if the 'eligibility for

entitlement funding' is simply not returned in the ILR then we can infer that the learner is not eligible for entitlement).

The **unknown** operator is most commonly used for defaulting values in the rule base where the user has the option of providing an overriding value (either directly or through an inferred attribute).

For example:

Operator	Example
certain	the claimant is eligible for the benefit if it is certain whether or not the claimant is entitled to a payment or the claimant's eligibility status is certain
uncertain	the outcome is unclear if it is uncertain whether or not the means have been achieved or the status of the investigation is uncertain
known	the interview has been completed if it is known whether or not the claimant is eligible for a payment or the claimant's rate of benefit is known
unknown	the generic heading should be shown if it is unknown whether or not the person is eligible or the person's rate of entitlement in unknown
currently known	income details are available if the applicant's income is currently known

Section 3: Interface Agreement

Inputs

Global

Public Name	OPA Local Name	Data Type	Temporal	Source
AreaCostFactor1618	the provider's 16-18 area cost factor	Number		FundingFactorValue FROM Org.Org_Funding WHERE Org_Funding.UKPRN=LearningProvider.UKPRN and Org_Funding.FundingFactorType='EFA 16-19' and Org_Funding.FundingFactor='HISTORIC AREA COST FACTOR' and Org_Funding.EffectiveFrom='1-Aug-2017'
DisadvantageProportion	the provider's disadvantage proportion	Number		FundingFactorValue FROM Org.Org_Funding WHERE Org_Funding.UKPRN=LearningProvider.UKPRN and Org_Funding.FundingFactorType='EFA 16-19' and Org_Funding.FundingFactor='HISTORIC DISADVANTAGE FUNDING PROPORTION' and Org_Funding.EffectiveFrom='1-Aug-2017'
HistoricLargeProgrammeProportion	the provider's historic large programme proportion	Number		FundingFactorValue FROM Org.Org_Funding WHERE Org_Funding.UKPRN=LearningProvider.UKPRN and Org_Funding.FundingFactorType='EFA 16-19' and Org_Funding.FundingFactor='HISTORIC LARGE PROGRAMME PROPORTION' and Org_Funding.EffectiveFrom='1-Aug-2017'

Public Name	OPA Local Name	Data Type	Temporal	Source
LARSVersion	the LARS reference data version	Text		CurrentVersion FROM LARS.LARS_Current_Version
OrgVersion	the Org reference data version	Text		CurrentVersion FROM Org.Org_Current_Version
PostcodeDisadvantageVersion	the postcode disadvantage reference data version	Text		
ProgrammeWeighting	the provider's programme weighting	Number		FundingFactorValue FROM Org.Org_Funding WHERE Org_Funding.UKPRN=LearningProvider.UKPRN and Org_Funding.FundingFactorType='EFA 16-19' and Org_Funding.FundingFactor='HISTORIC PROGRAMME COST WEIGHTING FACTOR' and Org_Funding.EffectiveFrom='1-Aug-2017'
RetentionFactor	the provider's retention factor	Number		FundingFactorValue FROM Org.Org_Funding WHERE Org_Funding.UKPRN=LearningProvider.UKPRN and Org_Funding.FundingFactorType='EFA 16-19' and Org_Funding.FundingFactor='HISTORIC RETENTION FACTOR' and Org_Funding.EffectiveFrom='1-Aug-2017'
SpecialistResources	the provider has specialist resources	Boolean		True if a record exists in the Org.Org_Funding table WHERE FundingFactorValue=1 and Org_Funding.UKPRN=LearningProvider.UKPRN and Org_Funding.FundingFactorType='EFA 16-19' and Org_Funding.FundingFactor='SPECIALIST RESOURCES'. False otherwise.
UKPRN	the provider's UKPRN	Number		UKPRN FROM DCSS Intrajob Valid.LearningProvider

Learner

Public Name	OPA Local Name	Data Type	Temporal	Source
DateOfBirth	the learner's date of birth	Date		DateOfBirth FROM DCSS Intrajob Valid.Learner
EngGrade	the learner's GCSE English qualification grade	Text		EngGrade FROM DCSS Intrajob Valid.Learner
LearnRefNumber	the learner's learner reference number	Text		LearnRefNumber FROM DCSS Intrajob Valid.Learner
LrnFAM_ECF	the learner's ECF FAM code	Number		LrnFAM_ECF FROM DCSS Intrajob Valid.Learner
LrnFAM_EDF1	the learner's EDF FAM code 1	Number		LrnFAM_EDF1 FROM DCSS Intrajob Valid.Learner
LrnFAM_EDF2	the learner's EDF FAM code 2	Number		LrnFAM_EDF2 FROM DCSS Intrajob Valid.Learner
LrnFAM_EHC	the learner's EHC FAM code	Number		LrnFAM_EHC FROM DCSS Intrajob Valid.Learner
LrnFAM_HNS	the learner's HNS FAM code	Number		LrnFAM_HNS FROM DCSS Intrajob Valid.Learner
LrnFAM_LDA	the learner's LDA FAM code	Number		LrnFAM_LDA FROM DCSS Intrajob Valid.Learner
LrnFAM_MCF	the learner's MCF FAM code	Number		LrnFAM_MCF FROM DCSS Intrajob Valid.Learner
MathGrade	the learner's GCSE Maths qualification grade	Text		MathGrade FROM DCSS Intrajob Valid.Learner
PlanEEPHours	the learner's planned employability, enrichment and pastoral hours	Number		PlanEEPHours FROM DCSS Intrajob Valid.Learner

Public Name	OPA Local Name	Data Type	Temporal	Source
PlanLearnHours	the learner's planned learning hours	Number		PlanLearnHours FROM DCSS Intrajob Valid.Learner
PostcodeDisadvantage Uplift	the learner's postcode disadvantage uplift	Number		Uplift FROM Postcode Factors.EFA_PostcodeDisadvantage WHERE EFA_PostcodeDisadvantage.Postcode=Learner.HomePostcode OR (Learner.HomePostcode = 'ZZ99 9ZZ' AND EFA_PostcodeDisadvantage.Postcode=Learner.CurrentPostcode)
ULN	the learner's unique learner number	Number		ULN FROM DCSS Intrajob Valid.Learner

LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal	Source
AimSeqNumber	the learning delivery's aim sequence number	Number		AimSeqNumber FROM DCSS Intrajob Valid.LearningDelivery
AimType	the learning delivery's aim type	Number		AimType FROM DCSS Intrajob Valid.LearningDelivery
AwardOrgCode	the learning delivery's awarding organisation code	Text		AwardOrgCode FROM LARS.LARS_LearningDelivery WHERE LARS_LearningDelivery.LearnAimRef=LearningDelivery.LearnAimRef
CompStatus	the learning delivery's completion status	Number		CompStatus FROM DCSS Intrajob Valid.LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal	Source
EFACOFType	the EFA Condition of funding type	Number		EFACOFType FROM LARS.LARS_LearningDelivery WHERE LARS_LearningDelivery.LearnAimRef=LearningDelivery.LearnAimRef
FundModel	the learning delivery's funding model	Number		FundModel FROM DCSS Intrajob Valid.LearningDelivery
LearnActEndDate	the learning delivery's learning actual end date	Date		LearnActEndDate FROM DCSS Intrajob Valid.LearningDelivery
LearnAimRef	the learning delivery's learning aim reference	Text		LearnAimRef FROM DCSS Intrajob Valid.LearningDelivery
LearnAimRefTitle	the learning delivery's learning aim reference title	Text		LearnAimRefTitle FROM LARS.LARS_LearningDelivery WHERE LARS_LearningDelivery.LearnAimRef=LearningDelivery.LearnAimRef
LearnAimRefType	the learning delivery's learning aim reference type	Text		LearnAimRefType FROM LARS.LARS_LearningDelivery WHERE LARS_LearningDelivery.LearnAimRef=LearningDelivery.LearnAimRef
LearnPlanEndDate	the learning delivery's learning planned end date	Date		LearnPlanEndDate FROM DCSS Intrajob Valid.LearningDelivery
LearnStartDate	the learning delivery's learning start date	Date		LearnStartDate FROM DCSS Intrajob Valid.LearningDelivery
LrnDelFAM_LDM1	the learning delivery's LDM 1 FAM code	Number		LrnDelFAM_LDM1 FROM DCSS Intrajob Valid.LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal	Source
LrnDelFAM_LDM2	the learning delivery's LDM 2 FAM code	Number		LrnDelFAM_LDM2 FROM DCSS Intrajob Valid.LearningDelivery
LrnDelFAM_LDM3	the learning delivery's LDM 3 FAM code	Number		LrnDelFAM_LDM3 FROM DCSS Intrajob Valid.LearningDelivery
LrnDelFAM_LDM4	the learning delivery's LDM 4 FAM code	Number		LrnDelFAM_LDM4 FROM DCSS Intrajob Valid.LearningDelivery
LrnDelFAM_SOF	the learning delivery's SOF FAM code	Number		LrnDelFAM_SOF FROM DCSS Intrajob Valid.LearningDelivery
ProgType	the learning delivery's programme type	Number		ProgType FROM DCSS Intrajob Valid.LearningDelivery
SectorSubjectAreaTier2	the learning delivery's sector subject area tier 2	Number		SectorSubjectAreaTier2 FROM LARS.LARS_LearningDelivery WHERE LARS_LearningDelivery.LearnAimRef=LearningDelivery.LearnAimRef
WithdrawReason	the learning delivery's withdrawal reason	Number		WithdrawReason FROM DCSS Intrajob Valid.LearningDelivery

LearningDeliveryLARSValidity

Public Name	OPA Local Name	Data Type	Temporal	Source
ValidityCategory	the LARS validity's category	Text		ValidityCategory FROM LARS.LARS_Validity WHERE LARS_Validity.LearnAimRef=LearningDelivery.LearnAimRef
ValidityLastNewStartDate	the LARS validity's last date for new starts	Date		LastNewStartDate FROM LARS.LARS_Validity WHERE LARS_Validity.LearnAimRef=LearningDelivery.LearnAimRef

Public Name	OPA Local Name	Data Type	Temporal	Source
ValidityStartDate	the LARS validity's start date	Date		StartDate FROM LARS.LARS_Validity WHERE LARS_Validity.LearnAimRef=LearningDelivery.LearnAimRef

DPOutcome

Public Name	OPA Local Name	Data Type	Temporal	Source
OutCode	the learner destination and progression outcomes code	Number		OutCode FROM DCSS Intrajob Valid.DPOutcome WHERE DPOutcome.LearnRefNumber=Learner.LearnRefNumber
OutType	the learner destination and progression outcomes type	Text		OutType FROM DCSS Intrajob Valid.DPOutcome WHERE DPOutcome.LearnRefNumber=Learner.LearnRefNumber

Outputs

Global

Public Name	OPA Local Name	Data Type	Size	Precision	Temporal	Uncertain Derivation
LARSVersion	the LARS reference data version	Text	50			
OrgVersion	the Org reference data version	Text	50			
PostcodeDisadvantageVersion	the postcode disadvantage reference data version	Text	50			
RulebaseVersion	the current version of the rulebase	Text	10			null
UKPRN	the provider's UKPRN	Number	8			

Learner

Public Name	OPA Local Name	Data Type	Size	Precision	Temporal	Uncertain Derivation
AcadMonthPayment	the learner's payment period	Number	2			0
AcadProg	the learner is studying an academic programme	Boolean				null
ActualDaysILCurrYear	the learner's actual number of days this funding year	Number	3			0
AreaCostFact1618Hist	the provider's historic 16-18 area cost factor	Number	10	5		0
Block1DisadvUpliftNew	the learner's new block 1 disadvantage uplift	Number	10	5		0
Block2DisadvElementsNew	the learner's new block 2 disadvantage elements	Number	10	5		0
ConditionOfFundingEnglish	the learner's English condition of funding status	Text	100			null
ConditionOfFundingMaths	the learner's Mathematics condition of funding status	Text	100			null
CoreAimSeqNumber	the learner's latest core aim sequence number	Number	3			0
FullTimeEquiv	the learner's FTE	Number	10	5		0
FundLine	the learner's funding line type	Text	100			null
LearnerActEndDate	the learner's actual end date	Date				null
LearnerPlanEndDate	the learner's planned end date	Date				null
LearnerStartDate	the learner's start date	Date				null
LearnRefNumber	the learner's learner reference number	Text	12			

Public Name	OPA Local Name	Data Type	Size	Precision	Temporal	Uncertain Derivation
NatRate	the learner's national rate	Currency	10	5		0
OnProgPayment	the learner's on-programme funding	Currency	10	5		0
PlannedDaysILCurrYear	the learner's planned number of days this funding year	Number	3			0
ProgWeightHist	the provider's historic programme weighting	Number	10	5		0
ProgWeightNew	the learner's new programme weighting	Number	10	5		0
PrvDisadvPropnHist	the provider's historic disadvantage proportion	Number	10	5		0
PrvHistLrgProgPropn	the provider's large programme proportion	Number	10	5		0
PrvRetentFactHist	the provider's historic retention factor	Number	10	5		0
RateBand	the learner's rate band	Text	50			null
RetentNew	the learner's new retention status	Number	10	5		0
StartFund	the learner is a start	Boolean				null
ThresholdDays	the learner's qualifying period in days	Number	2			0

Section 4: Funding Calculation Rule Base

Assumptions

Scope of calculations

This rule base will only be required to process data based on ILR records where FundModel = 25, with exception of the condition of funding element which will look across all aims to establish whether or not a learner is undertaking an approved maths and/or English qualification in order to meet the condition (this includes the Princes Trust TEAM programme). References to the Learning Aim Reference Service (LARS) assume that the funding model-dependent data has been filtered for the relevant funding model/ILR subset code.

Funding Elements

Source of Funding

This element creates a learner level source of funding flag using the 'Learning Delivery Funding and Monitoring' entity in the ILR to find the source of funding code. The learner is set to EFA where at least one of the learner's aims is EFA funded, where no EFA funded aims are found if the learner has at least one SFA funded aim the learner is set to SFA funded otherwise a value of Other is returned.

the learner's source of funding	
"EFA"	for at least one of the learner's EFA learning deliveries the learning delivery's SOF FAM code is currently known and the learning delivery's SOF FAM code = 107
"SFA"	for at least one of the learner's EFA learning deliveries the learning delivery's SOF FAM code is currently known and the learning delivery's SOF FAM code = 105
"Other"	**otherwise**

Funding Line Type

the learner's funding line type	
"14-16 Direct Funded Students"	the learner's source of funding = "EFA" and any the learner's age at 31st August = 14 or the learner's age at 31st August = 15 and for at least one of the learner's EFA learning deliveries the learning delivery is Direct Funded
"16-19 High Needs Students"	the learner's source of funding = "EFA" and the learner's age at 31st August < 19 and the learner's HNS FAM code is currently known and the learner's HNS FAM code = 1

"16-19 Students (excluding High Needs Students)"	the learner's source of funding = "EFA" and the learner's age at 31st August < 19 and either all the learner's HNS FAM code is currently known and the learner's HNS FAM code <> 1 or the learner's HNS FAM code is unknown
"19-24 Students with an EHCP"	the learner's source of funding = "EFA" and the learner's age at 31st August >= 19 and the learner's age at 31st August <= 24 and the learner's EHC FAM code is currently known and the learner's EHC FAM code = 1
"25+ Students with an EHCP "	the learner's source of funding = "SFA" and the learner's age at 31st August >= 25 and the learner's EHC FAM code is currently known and the learner's EHC FAM code = 1
"19+ Continuing Students (excluding EHCP)"	the learner's source of funding = "EFA" and the learner's age at 31st August >= 19
"16-18 Traineeships (Adult Funded)"	the learner's source of funding = "SFA" and the learner's age at 31st August < 19 and for at least one of the learner's EFA learning deliveries the learning delivery's programme type is currently known and the learning delivery's programme type = 24
"19+ Traineeships (Adult Funded)"	the learner's source of funding = "SFA" and the learner's age at 31st August >= 19 and for at least one of the learner's EFA learning deliveries the learning delivery's programme type is currently known and the learning delivery's programme type = 24
"Unknown"	**otherwise**

the learning delivery is Direct Funded if

all
- the learning delivery's LDM 1 FAM code is currently known and
  the learning delivery's LDM 1 FAM code = 320

or
all
- the learning delivery's LDM 2 FAM code is currently known and
  the learning delivery's LDM 2 FAM code = 320

or
all
- the learning delivery's LDM 3 FAM code is currently known and
  the learning delivery's LDM 3 FAM code = 320

or
all
- the learning delivery's LDM 4 FAM code is currently known and
  the learning delivery's LDM 4 FAM code = 320

On-Programme Funding

This element calculates the total funding for the learner. Funding = (National Funding Rate * Historic Retention Factor * Historic Programme Weighting) * (1+ Historic Disadvantage Proportion) * Area Cost Allowance * (1+ Historic Large Programme Proportion).

the learner's on-programme funding	
(the learner's national rate * the provider's historic retention factor * the provider's historic programme weighting) * (1 + the provider's historic disadvantage proportion) * the provider's historic 16-18 area cost factor * (1 + the provider's large programme proportion)	the learner is a start and the learner's funding line type <> "14-16 Direct Funded Students"
0	**otherwise**

Condition of Funding

Condition of Funding

This element aids institutions in identifying students who do not meet the condition of funding.

the learner has Grade C or above English if

the learner's uppercase GCSE English qualification grade is currently known and
either
the learner's uppercase GCSE English qualification grade = "A*" or
the learner's uppercase GCSE English qualification grade = "A" or
the learner's uppercase GCSE English qualification grade = "B" or
the learner's uppercase GCSE English qualification grade = "C" or
the learner's uppercase GCSE English qualification grade = "9" or
the learner's uppercase GCSE English qualification grade = "8" or
the learner's uppercase GCSE English qualification grade = "7" or
the learner's uppercase GCSE English qualification grade = "6" or
the learner's uppercase GCSE English qualification grade = "5" or
the learner's uppercase GCSE English qualification grade = "4" or
all
the learner's ECF FAM code is currently known and
the learner's ECF FAM code = 3

the learner has Grade C or above Maths if

the learner's uppercase GCSE Maths qualification grade is currently known and
either
the learner's uppercase GCSE Maths qualification grade = "A*" or
the learner's uppercase GCSE Maths qualification grade = "A" or
the learner's uppercase GCSE Maths qualification grade = "B" or
the learner's uppercase GCSE Maths qualification grade = "C" or
the learner's uppercase GCSE Maths qualification grade = "9" or
the learner's uppercase GCSE Maths qualification grade = "8" or
the learner's uppercase GCSE Maths qualification grade = "7" or
the learner's uppercase GCSE Maths qualification grade = "6" or
the learner's uppercase GCSE Maths qualification grade = "5" or
the learner's uppercase GCSE Maths qualification grade = "4" or
all
the learner's MCF FAM code is currently known and
the learner's MCF FAM code = 3

the learning delivery is Prince's Trust TEAM if

the learning delivery is a core aim and
any
- all
  - the learning delivery's LDM 1 FAM code is currently known and
    the learning delivery's LDM 1 FAM code = 331
- or
  all
  - the learning delivery's LDM 2 FAM code is currently known and
    the learning delivery's LDM 2 FAM code = 331
- or
  all
  - the learning delivery's LDM 3 FAM code is currently known and
    the learning delivery's LDM 3 FAM code = 331
- or
  all
  - the learning delivery's LDM 4 FAM code is currently known and
    the learning delivery's LDM 4 FAM code = 331

and
any
- the learning delivery's learning aim reference = "60023995" or
  the learning delivery's learning aim reference = "60027307" or
  the learning delivery's learning aim reference = "60027629" or
  the learning delivery's learning aim reference = "60032121" or
  the learning delivery's learning aim reference = "60032868" or
  the learning delivery's learning aim reference = "60033344"

and
for at least one of the learning delivery's LARS validities
- the LARS validity's upper case category = "1619_EFA" and
  the LARS validity's start date is currently known and
  the learning delivery's learning start date is on or later than the LARS validity's start date and
  either
  - the LARS validity's last date for new starts is currently unknown or
    all
    - the LARS validity's last date for new starts is currently known and
      the learning delivery's learning start date is on or earlier than the LARS validity's last date for new starts

the learner is a traineeship if

for at least one of the learner's EFA learning deliveries
- the learning delivery's programme type is currently known and
  the learning delivery's programme type = 24

the learner has English GCSE Grade D if

the learner's uppercase GCSE English qualification grade is currently known and
either
- the learner's uppercase GCSE English qualification grade = "D" or
  the learner's uppercase GCSE English qualification grade = "3"

the learner has Maths GCSE Grade D if

the learner's uppercase GCSE Maths qualification grade is currently known and
either
- the learner's uppercase GCSE Maths qualification grade = "D" or
  the learner's uppercase GCSE Maths qualification grade = "3"

the learner is a 1516 continuer if

for at least one of the learner's EFA learning deliveries
the learning delivery's aim sequence number = the learner's latest core aim sequence number and
the learning delivery's learning start date is earlier than the first day of the 1516 funding year

the learning delivery is a recognised GCSE English qualification if

both
the learner's ECF FAM Code is currently known and
the learner's ECF FAM Code = 4
all
the learning delivery is a valid start for CoF and
either
the learner is a 1516 continuer or
the learner is a traineeship or
the learner does not have English GCSE Grade D or
all
the learner has English GCSE Grade D and
the learner's rate band <> "540+ hours (Band 5)" and
the learner's rate band <> "450+ hours (Band 4a)"
and
the learning delivery's number of LARS validity records > 0
for at least one of the learning delivery's LARS validities
the LARS validity's upper case category = "EFACONFUNDENGLISH" and
the LARS validity's start date is currently known and
the learning delivery's learning start date is on or later than the LARS validity's start date and
either
the LARS validity's last date for new starts is unknown or
all
the LARS validity's last date for new starts is currently known and
the learning delivery's learning start date is on or earlier than the LARS validity's last date for new starts
or
all
the learning delivery is a valid start for CoF
the learner has English GCSE Grade D and
either
the learner's rate band = "540+ hours (Band 5)" or
the learner's rate band = "450+ hours (Band 4a)"
and
the EFA Condition of funding type = 1 and
the learning delivery's number of LARS validity records > 0 and
for at least one of the learning delivery's LARS validities
the LARS validity's upper case category = "EFACONFUNDENGLISH" and
the LARS validity's start date is currently known and
the learning delivery's learning start date is on or later than the LARS validity's start date and
either
the LARS validity's last date for new starts is currently unknown or
all
the LARS validity's last date for new starts is currently known and
the learning delivery's learning start date is on or earlier than the LARS validity's last date for new starts
or
all
the learning delivery is a valid start for CoF and
either
the learner does not have English GCSE Grade D or

all
the learner has English GCSE Grade D and
the learner's rate band <> "540+ hours (Band 5)" and
the learner's rate band <> "450+ hours (Band 4a)"
and
the learning delivery is Prince's Trust TEAM

the learning delivery is a recognised GCSE Maths qualification if

both
the learner's MCF FAM Code is currently known and
the learner's MCF FAM Code = 4
or
all
the learning delivery is a valid start for CoF and
either
the learner is a 1516 continuer or
the learner is a traineeship or
the learner does not have Maths GCSE Grade D or
all
the learner has Maths GCSE Grade D and
the learner's rate band <> "540+ hours (Band 5)" and
the learner's rate band <> "450+ hours (Band 4a)"
and
the learning delivery's number of LARS validity records > 0
for at least one of the learning delivery's LARS validities
the LARS validity's upper case category = "EFACONFUNDMATHS" and
the LARS validity's start date is currently known and
the learning delivery's learning start date is on or later than the LARS validity's start date and
either
the LARS validity's last date for new starts is unknown or
all
the LARS validity's last date for new starts is currently known and
the learning delivery's learning start date is on or earlier than the LARS validity's last date for new starts
or
all
the learning delivery is a valid start for CoF
the learner has Maths GCSE Grade D and
either
the learner's rate band = "540+ hours (Band 5)" or
the learner's rate band = "450+ hours (Band 4a)"
and
the EFA Condition of funding type = 1 and
the learning delivery's number of LARS validity records > 0 and
for at least one of the learning delivery's LARS validities
the LARS validity's upper case category = "EFACONFUNDMATHS" and
the LARS validity's start date is currently known and
the learning delivery's learning start date is on or later than the LARS validity's start date and
either
the LARS validity's last date for new starts is currently unknown or
all
the LARS validity's last date for new starts is currently known and
the learning delivery's learning start date is on or earlier than the LARS validity's last date for new starts
or
all
the learning delivery is a valid start for CoF and

either

the learner does not have Maths GCSE Grade D or

all

the learner has Maths GCSE Grade D and

the learner's rate band <> "540+ hours (Band 5)" and

the learner's rate band <> "450+ hours (Band 4a)"

and

the learning delivery is Prince's Trust TEAM

the learner is recognised as an English exception if

the learner's ECF FAM code is currently known and

either

the learner's ECF FAM code = 1 or

the learner's ECF FAM code = 2

the learner is recognised as a Mathematics exception if

the learner's MCF FAM code is currently known and

either

the learner's MCF FAM code = 1 or

the learner's MCF FAM code = 2

the learner is not required to meet the condition of funding if

the learner's total planned hours <= 149 or

the learner's age at 31st August <= 15 or

the learner's source of funding = "SFA" or

for at least one of the learner's EFA learning deliveries

the learning delivery's aim sequence number = the learner's latest core aim sequence number and

the learning delivery's learning start date is earlier than the first day of the 1415 funding year

the learner's English condition of funding status	
"Condition of Funding Does Not Apply"	the learner is not required to meet the condition of funding
"Exempt from the GCSE English A*-C or 9 to 4 requirement"	the learner is recognised as an English exception
"Has English, Studying English"	the learner has Grade C or above English and for at least one of the learner's learning deliveries the learning delivery is a recognised GCSE English qualification
"Has English, Not Studying English"	the learner has Grade C or above English
"Doesn't have English, Studying English"	the learner does not have Grade C or above English and for at least one of the learner's learning deliveries the learning delivery is a recognised GCSE English qualification

"Has English GCSE Grade D or Grade 3, Not studying GCSE English"	the learner is not a 1516 continuer and the learner is not a traineeship and the learner has English GCSE Grade D and either the learner's rate band = "540+ hours (Band 5)" or the learner's rate band = "450+ hours (Band 4a)" and for all of the learner's learning deliveries the learning delivery is not a recognised GCSE English qualification
"Doesn't have English, Not Studying English"	the learner does not have Grade C or above English
""	**otherwise**

the learner's Mathematics condition of funding status	
"Condition of Funding Does Not Apply"	the learner is not required to meet the condition of funding
"Exempt from the GCSE Mathematics A*-C or 9 to 4 requirement"	the learner is recognised as a Mathematics exception
"Has Maths, Studying Maths"	the learner has Grade C or above Maths and for at least one of the learner's learning deliveries the learning delivery is a recognised GCSE Maths qualification
"Has Maths, Not Studying Maths"	the learner has Grade C or above Maths
"Doesn't have Maths, Studying Maths"	the learner does not have Grade C or above Maths and for at least one of the learner's learning deliveries the learning delivery is a recognised GCSE Maths qualification
"Has Maths GCSE Grade D or Grade 3, Not studying GCSE Maths"	the learner is not a 1516 continuer and the learner is not a traineeship and the learner has Maths GCSE Grade D and either the learner's rate band = "540+ hours (Band 5)" or the learner's rate band = "450+ hours (Band 4a)" and for all of the learner's learning deliveries the learning delivery is not a recognised GCSE Maths qualification
"Doesn't have Maths, Not Studying Maths"	the learner does not have Grade C or above Maths
""	**otherwise**

ToUpper(the LARS validity's upper case category = ToUpper(the LARS validity's category)

InstanceCount(learningdeliveryslarsvalidities) the learning delivery's number of LARS validity records
stage 1 = the number of the learning delivery's LARS validities

the learning delivery's number of LARS validity records	
the learning delivery's number of LARS validity records stage 1	the learning delivery's number of LARS validity records stage 1 is currently known
0	**otherwise**

ToUpper(the learner's uppercase GCSE Maths qualification grade = ToUpper(the learner's GCSE Maths qualification grade)

ToUpper the learner's uppercase GCSE English qualification grade = ToUpper(the learner's GCSE English qualification grade)

National Funding Rate Elements

Learner's National Rate

This element calculates the appropriate National Funding Rate for each student based on their total planned hours (planned qualification hours plus planned employability, enrichment and pastoral hours).

The learner's national rate is split into six bands, one full time and five-part time, based on bands of hours (defined by the learning hours threshold elements).

the learner's rate band	
"540+ hours (Band 5)"	the learner's total planned hours >= the learning hours threshold for full time students and either the learner's age at 31st August < 18 or the learner is HNS
"450+ hours (Band 4a)"	the learner's total planned hours >= the learning hours threshold for part time band 4 students and the learner's age at 31st August >= 18 and the learner is not HNS
"450 to 539 hours (Band 4b)"	the learner's total planned hours >= the learning hours threshold for part time band 4 students
"360 to 449 hours (Band 3)"	the learner's total planned hours >= the learning hours threshold for part time band 3 students
"280 to 359 hours (Band 2)"	the learner's total planned hours >= the learning hours threshold for part time band 2 students
"Up to 279 hours (Band 1)"	the learner's total planned hours >= the learning hours threshold for part time band 1 students
"None"	**otherwise**

the learner is HNS if

the learner's HNS FAM code is currently known and
the learner's HNS FAM code = 1

the learner is LDA if

the learner's LDA FAM code is currently known and
the learner's LDA FAM code = 1

the learner is EHC if

the learner's EHC FAM code is currently known and
the learner's EHC FAM code = 1

the learner's national rate	
the national rate for full time students	the learner's rate band = "540+ hours (Band 5)"
the national rate for part time band 4 students	the learner's rate band = "450+ hours (Band 4a)" or the learner's rate band = "450 to 539 hours (Band 4b)"
the national rate for part time band 3 students	the learner's rate band = "360 to 449 hours (Band 3)"
the national rate for part time band 2 students	the learner's rate band = "280 to 359 hours (Band 2)"
the national rate per FTE for part time band 1 students * the learner's FTE	the learner's rate band = "Up to 279 hours (Band 1)"
0	**otherwise**

Learner's Total Planned Hours

This element returns the sum of the planned learning hours and planned employability, enrichment and pastoral hours from the ILR.

the learner's total planned hours	
the learner's planned learning hours + the learner's planned employability, enrichment and pastoral hours	the learner's planned learning hours is currently known and the learner's planned employability, enrichment and pastoral hours is currently known
the learner's planned learning hours	the learner's planned learning hours is currently known
the learner's planned employability, enrichment and pastoral hours	the learner's planned employability, enrichment and pastoral hours is currently known
0	**otherwise**

the learner's FTE = the learner's total planned hours / the funded hours per FTE

Uplifts and Factors

Learning Delivery Academic Flag

This element calculates a flag for each aim to determine whether or not it is deemed academic (based on the aim type). This flag is used in later steps to determine what programme cost weighting the core aim should carry.

the learning delivery is an academic aim	
false	the learning delivery's learning aim reference type is unknown
false	the learning delivery is general studies or critical thinking
true	the learning delivery's learning aim reference type = "0001" or the learning delivery's learning aim reference type = "0002" or the learning delivery's learning aim reference type = "1413" or the learning delivery's learning aim reference type = "1430" or the learning delivery's learning aim reference type = "1431" or the learning delivery's learning aim reference type = "1432" or the learning delivery's learning aim reference type = "1433" or the learning delivery's learning aim reference type = "1434" or the learning delivery's learning aim reference type = "1435" or the learning delivery's learning aim reference type = "1453" A-Level
true	the learning delivery's learning aim reference type = "0003" or the learning delivery's learning aim reference type = "1081" or the learning delivery's learning aim reference type = "1422" or the learning delivery's learning aim reference type = "2999" GCSE
true	all the learning delivery's learning aim reference type = "0016" and the learning delivery's upper case awarding organisation code is currently known and the learning delivery's upper case awarding organisation code = "IB" or the learning delivery's learning aim reference type = "1401" International Baccalaureate
true	the learning delivery's learning aim reference type = "1446" or the learning delivery's learning aim reference type = "1447" Pre-U
true	the learning delivery's learning aim reference type = "1420" FSMQ
true	the learning delivery's learning aim reference type = "1440" Access to HE
false	**otherwise**

the learning delivery's upper case awarding organisation code = ToUpper(the learning delivery's awarding organisation code)

General Studies and Critical Thinking

This element flags general studies aims for the learning delivery academic flag.

the learning delivery is general studies or critical thinking if

the learning delivery's learning aim reference title is currently known and
either
the learning delivery's learning aim reference title contains "General Studies" or
the learning delivery's learning aim reference title contains "Critical Thinking"
the learning delivery's learning aim reference type is currently known and
any
the learning delivery's learning aim reference type = "0001" or
the learning delivery's learning aim reference type = "0002" or
the learning delivery's learning aim reference type = "1413" or
the learning delivery's learning aim reference type = "1430" or
the learning delivery's learning aim reference type = "1432" or
the learning delivery's learning aim reference type = "1434" or
the learning delivery's learning aim reference type = "1453"

Learner is Studying an Academic Programme

This element uses the learning delivery academic flag to determine whether or not the learner's core aim represents an academic programme or a vocational programme (if the learner is not academic the default value is vocational).

the learner is studying an academic programme	
true	the learner's number of core aim records = 0
true	for at least one of the learner's EFA learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery is an academic aim
false	**otherwise**

Learner's New Retention Status

This element sources the in-year retention status for each learner calculating an in year value from 2017/18 data. For academic learners the calculation sets the learner as retained if any of the aims in the programme are continuing, completed or on a planned break otherwise the learner is not retained. For vocational learners this logic runs only on the core aim.

the learner's new retention status	
0	the learner is not a start
1	the latest programme is a traineeship and for at least one of the learner's EFA traineeship programme aims the learning delivery's aim sequence number = the learner's latest EFA traineeship programme aim sequence number and the learning delivery's completion status is currently known and any the learning delivery's completion status = 1 or the learning delivery's completion status = 2 or the learning delivery's completion status = 6 or all the learning delivery's completion status = 3 and

	the learning delivery's withdrawal reason is currently known and the learning delivery's withdrawal reason = 7 or all the learning delivery's completion status = 3 and either the learner destination and progression outcomes indicates the learner has gone into employment or the learner destination and progression outcomes indicates the learner has gone into other education
1	the learner is studying an academic programme and for at least one of the learner's EFA learning deliveries the learning delivery is an academic aim and the learning delivery's completion status is currently known and any the learning delivery's completion status = 1 or the learning delivery's completion status = 2 or the learning delivery's completion status = 6 or all the learning delivery's completion status = 3 and the learning delivery's withdrawal reason is currently known and the learning delivery's withdrawal reason = 7
1	the learner is not studying an academic programme and for at least one of the learner's EFA learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's completion status is currently known and any the learning delivery's completion status = 1 or the learning delivery's completion status = 2 or the learning delivery's completion status = 6 or all the learning delivery's completion status = 3 and the learning delivery's withdrawal reason is currently known and the learning delivery's withdrawal reason = 7
0.5	**Otherwise**

the latest programme is a traineeship if

for at least one of the learner's EFA learning deliveries
the learning delivery's aim sequence number = the learner's latest core aim sequence number and
the learning delivery's programme type is currently known
the learning delivery's programme type = 24

Latest EFA Traineeship Programme Aim

There could be more than one EFA traineeship programme aim in a learner's dataset in one academic year, therefore a set of logic is applied to pick the latest traineeship aim in the set. This achieved in 4 steps.

Step 1 identifies the EFA traineeship programme aim(s) from all the learner's aims.

the learning delivery is an EFA traineeship programme aim if

the learning delivery's programme type is currently known and
the learning delivery's programme type = 24 and
the learning delivery's aim type = 1

the learning delivery is a member of the learner's EFA traineeship programme aims if

the learning delivery is a member of the learner's learning deliveries and
the learning delivery is an EFA traineeship programme aim

the learner's number of EFA traineeship programme aim records stage 1 = the number of the learner's EFA traineeship programme aims

Learner's Number of EFA Traineeship Programme Aims

Step 2 calculates how many EFA traineeship programme aims are in the learner's dataset.

the learner's number of EFA traineeship programme aim records stage 1 = the number of the learner's EFA traineeship programme aims

the learner's number of EFA traineeship programme aim records	
the learner's number of EFA traineeship programme aim records stage 1	**the learner's number of EFA traineeship programme aim records stage 1 is currently known**
0	**otherwise**

Learner's Latest EFA Traineeship Programme Aim

Step 3 picks the latest EFA Traineeship Programme aim from the learner's dataset using the EFA Traineeship Programme aims start date.

the learner's latest EFA traineeship programme aim start date	
the learning delivery's learning start date which is the latest for all of the learner's EFA traineeship programme aims	the learner's number of EFA traineeship programme aim records > 0
uncertain	**otherwise**

the learner's latest learning delivery start date	
the learning delivery's learning start date which is the latest for all of the learner's learning deliveries	the number of the learner's learning deliveries > 0
uncertain	**otherwise**

Latest EFA Traineeship Programme Aim Sequence Number

Step 4 then extracts the aim sequence number for the latest EFA traineeship programme aim selected in step 3.

the learner's latest EFA traineeship programme aim sequence number	
the learning delivery's aim sequence number which is the greatest for all of the learner's EFA traineeship programme aims for which it is the case that the learning delivery's learning start date = the learner's latest EFA traineeship programme aim start date	the learner's number of EFA traineeship programme aim records > 0
0	**otherwise**

Historic Retention

This is a lookup value based on the retention factor used for the 2017/18 allocation passed into the calculation and used for the on programme funding element.

the provider's historic retention factor	
the provider's retention factor	the provider's retention factor is currently known
0	**otherwise**

New Programme Weighting

These two elements source the future factor for programme cost weighting calculating an in year value from the core aim recorded in the 2017/18 data. The learning delivery's programme weighting uses the Sector subject area tier 2 of the core aim recorded in the 2017/18 data (if the learner is academic a default of 1 is set). This element is then used to calculate the learner's new programme weighting where a core aim is recorded. If there is no core aim recorded (as there may not be for academic learners in the annual school census) the weighting is set to a default value of 1. The Prince's Trust TEAM programme carries a programme weighting of 1.2 which overrides the SSA Tier 2 code.

the learner's new programme weighting stage 1	
InstanceValueIf(the learner's EFA learning deliveries, the learning delivery's programme weighting, the learning delivery's aim sequence number = the learner's latest core aim sequence number)	the learner's number of core aim records > 0
1	**otherwise**

the learner's new programme weighting = the learner's new programme weighting stage 1

the learner's new programme weighting	
1.2	the learner's new programme weighting stage 1 = 1 and for at least one of the learner's EFA learning deliveries the learning delivery is Prince's Trust TEAM
the learner's new programme weighting stage 1	**otherwise**

the learning delivery's programme weighting	
1	the learner is studying an academic programme
1	the learning delivery's Sector subject area tier 2 is unknown
1.75	any the learning delivery's Sector subject area tier 2 = 3 or the learning delivery's Sector subject area tier 2 = 3.1 or the learning delivery's Sector subject area tier 2 = 3.2 or the learning delivery's Sector subject area tier 2 = 3.3 or the learning delivery's Sector subject area tier 2 = 3.4 and the provider has specialist resources
1.3	any the learning delivery's Sector subject area tier 2 = 3 or the learning delivery's Sector subject area tier 2 = 3.1 or the learning delivery's Sector subject area tier 2 = 3.2 or the learning delivery's Sector subject area tier 2 = 3.3 or the learning delivery's Sector subject area tier 2 = 3.4 or the learning delivery's Sector subject area tier 2 = 4.1 or the learning delivery's Sector subject area tier 2 = 4.2
1.2	any the learning delivery's Sector subject area tier 2 = 4 or the learning delivery's Sector subject area tier 2 = 4.3 or the learning delivery's Sector subject area tier 2 = 5 or the learning delivery's Sector subject area tier 2 = 5.1 or the learning delivery's Sector subject area tier 2 = 5.2 or the learning delivery's Sector subject area tier 2 = 6.1 or the learning delivery's Sector subject area tier 2 = 7 or the learning delivery's Sector subject area tier 2 = 7.1 or the learning delivery's Sector subject area tier 2 = 7.3 or the learning delivery's Sector subject area tier 2 = 7.4 or the learning delivery's Sector subject area tier 2 = 9.1 or the learning delivery's Sector subject area tier 2 = 9.2 or the learning delivery's Sector subject area tier 2 = 13 or the learning delivery's Sector subject area tier 2 = 13.1 or the learning delivery's Sector subject area tier 2 = 13.2
1	**otherwise**

Historic Programme Cost Weighting

This is a lookup value based on the programme cost weighting factor used for the 2017/18 allocation passed into the calculation and used for the on programme funding element.

the provider's historic programme weighting	
the provider's programme weighting	the provider's programme weighting is currently known
0	**otherwise**

Historic Area Cost

This is a lookup value based on the Area Cost factor used for the 2017/18 allocation passed into the calculation and used for the on programme funding element.

the provider's historic 16-18 area cost factor	
the provider's 16-18 area cost factor	the provider's 16-18 area cost factor is currently known
0	**otherwise**

Provider's Large Programme Proportion

This is a lookup value based on the Area Cost factor used for the 2017/18 allocation passed into the calculation and used for the on programme funding element.

the provider's large programme proportion	
the provider's historic large programme proportion	the provider's historic large programme proportion is currently known
0	**otherwise**

Supporting rules

the learner destination and progression outcomes upper case type = ToUpper(the learner destination and progression outcomes type)

the learner destination and progression outcomes indicates the learner has gone into employment if

the learner's number of destination and progression outcome records >0
and
for at least one of the learner's destination and progression outcomes
the learner destination and progression outcomes upper case type = "EMP" and
either
the learner destination and progression outcomes code = 1 or
the learner destination and progression outcomes code = 4

the learner destination and progression outcomes indicates the learner has gone into other education if

the learner's number of destination and progression outcome records > 0
and
for at least one of the learner's destination and progression outcomes
the learner destination and progression outcomes upper case type = "EDU" and
either
the learner destination and progression outcomes code = 2 or
the learner destination and progression outcomes code = 4 or
the learner destination and progression outcomes code = 5

the learner destination and progression outcome record count stage 1 = the number of the learner's destination and progression outcomes

the learner's number of destination and progression outcome records	
the learner destination and progression outcome record count stage 1	the learner destination and progression outcome record count stage 1 is currently known
0	**otherwise**

Disadvantage Elements

New Block 1 Disadvantage Uplift

This element sources the future factor for disadvantage block 1 calculating an in year value based on the IMD 2015 uplift matched of the learners home postcode from 2017/18 data.

the learner's new block 1 disadvantage uplift	
the learner's postcode disadvantage uplift	the learner's postcode disadvantage uplift is currently known
1	**otherwise**

New Block 2 Disadvantage Elements

This is a count of the elements of block 2 disadvantage that the learner is eligible for, 1 if they have no Grade C or Above English, 1 if they have no Grade C or above Maths, 2 if they have neither.

the learner does not have Grade C or above English by year 11 if

all
- the learner's EDF FAM code 1 is currently known and
  the learner's EDF FAM code 1 = 2

or
all
- the learner's EDF FAM code 2 is currently known and
  the learner's EDF FAM code 2 = 2

the learner does not have Grade C or above Maths by year 11 if

all
- the learner's EDF FAM code 1 is currently known and
  the learner's EDF FAM code 1 = 1

or
all
- the learner's EDF FAM code 2 is currently known and
  the learner's EDF FAM code 2 = 1

the learner's new block 2 disadvantage elements	
0	the learner has Grade C or above English by year 11 and the learner has Grade C or above Maths by year 11
1	the learner has Grade C or above English by year 11 or the learner has Grade C or above Maths by year 11
2	**otherwise**

Historic Disadvantage Proportion

This is a lookup value based on the disadvantage funding (block 1 and block 2) from the 2017/18 allocation passed into the calculation and used for the on programme funding element. This value is calculated as the total Block 1 and Block 2 elements of your 2017/18 allocation as a proportion of the total programme funding (less disadvantage and before area cost).

the provider's historic disadvantage proportion	
the provider's disadvantage proportion	the provider's disadvantage proportion is currently known
0	**otherwise**

Parameters

These are fixed values that are passed through the various elements of the funding calculation.

the first day of the current funding year = 2017-08-01
the last day of the current funding year = 2018-07-31
the 1st June of the current funding year = 2018-06-01
the first day of the 1415 funding year = 2014-08-01
the first day of the 1516 funding year = 2015-08-01

the funded hours per FTE = 600
the national rate for full time students = £4,000
the learning hours threshold for full time students = 540
the national rate for part time band 4 students = £3,300
the learning hours threshold for part time band 4 students = 450
the national rate for part time band 3 students = £2,700
the learning hours threshold for part time band 3 students = 360
the national rate for part time band 2 students = £2,133
the learning hours threshold for part time band 2 students = 280
the national rate per FTE for part time band 1 students = £4,000
the learning hours threshold for part time band 1 students = 0

Date Rules

Summer School Students

We need to exclude summer school students from the valid starts. These are identified as those students who are <= 15 years old whose earliest start date falls on or after 1st June of the relevant academic year.

the learner is a summer school student if

the learner's age at 31st August <= 15 and
the learner's start date is on or later than the 1st June of the current funding year

The Learner is a Valid Start

The learner is counted as a start this year if their actual learning this year meets the appropriate number of threshold days - which is based on the planned learning this year.

the learner is a start if

the learner's qualifying period in days > 0 and
the learner's actual number of days this funding year >= the learner's qualifying period in days and
the learner is not a summer school student

Learner Qualifying Period

This element calculates the qualifying period of the learner based on the planned duration of their programme.

the learner's qualifying period in days	
42	the learner's total planned hours >= the learning hours threshold for part time band 4 students
42	the learner's planned number of days this funding year >= 168
14	the learner's planned number of days this funding year >= 14
0	**otherwise**

Learner's Planned Days in Funding Year

This element calculates the learner's planned programme duration as the difference between the learner's start date this year and their planned end date this year.

the learner's planned number of days this funding year	
the number of days (inclusive) from the learner's start date this year to the learner's planned end date this year	the learner's start date this year is certain and the learner's planned end date this year is certain and the learner's planned end date this year is on or later than the learner's start date this year
0	**otherwise**

Learner's Actual Days in Funding Year

This element calculates the learner's actual programme duration as the difference between the learner's start date this year and their actual end date this year.

the learner's actual number of days this funding year	
DayDifferenceInclusive(the number of days (inclusive) from the learner's start date this year to the learner's actual end date this year	the learner's start date this year is certain and the learner's actual end date this year is certain and the learner's actual end date this year is on or later than the learner's start date this year
0	**otherwise**

Start Date Calculations

The start date used in planned duration elements is calculated in 2 steps.

The first step is to pick the earliest of the learning deliveries start dates.

InstanceMinimum(learnersefalearningdeliveries, the learner's start date = the earliest of all the learning delivery's learning start date for the learner's EFA learning deliveries

The second step adjusts the start date to the start of the academic year if it falls before the start of the academic year.

the learner's start date this year	
uncertain	the learner's actual end date is currently known and the learner's actual end date is earlier than the first day of the current funding year
the first day of the current funding year	the learner's start date is earlier than the first day of the current funding year
the learner's start date	the learner's start date is on or earlier than the last day of the current funding year
uncertain	**otherwise**

Planned End Date Calculations

The planned end date used in planned duration elements is calculated in 2 steps.

The first step picks the latest of the learning deliveries planned end dates.

InstanceMaximum(learnersefalearningdeliveries, the learner's planned end date = the latest of all the learning delivery's learning planned end date for the learner's EFA learning deliveries

The second step adjusts the planned end date to the end of the academic year if it falls after the end of the academic year.

the learner's planned end date this year	
uncertain	the learner's start date is later than the last day of the current funding year
the last day of the current funding year	the learner's planned end date is later than the last day of the current funding year
the learner's planned end date	the learner's planned end date is on or later than the first day of the current funding year
uncertain	**otherwise**

Actual End Date Calculations

The actual end date used in planned duration elements is calculated in a number of steps.

The first step is to use the planned end date if there is no actual end date.

the learning delivery's adjusted actual end date	
the learning delivery's learning actual end date	the learning delivery's learning actual end date is currently known
the learning delivery's learning planned end date	**otherwise**

The second step is to pick the latest end date across all the learner's aims. The learner's actual end date is the latest of the learning deliveries actual end dates (or planned end date if the actual end date is unknown).

InstanceMaximum(learnersefalearningdeliveries, the learner's actual end date = the latest of all the learning delivery's adjusted actual end date for the learner's EFA learning deliveries

The third step is to adjust the end date to the end of the academic year if it goes beyond the end of the academic year.

the learner's actual end date this year	
uncertain	the learner's start date is later than the last day of the current funding year
the last day of the current funding year	the learner's actual end date is currently known and the learner's actual end date is later than the last day of the current funding year
the learner's actual end date	the learner's actual end date is currently known and the learner's actual end date is on or later than the first day of the current funding year
uncertain	**otherwise**

Learner's Payment Period

This is the period (1-12) which the payments are allocated to.

the learner's payment period	
ExtractMonth(the learner's start date this year) + 5	the learner is a start and ExtractMonth(the learner's start date this year) <= 7
ExtractMonth(the learner's start date this year) - 7	the learner is a start and ExtractMonth(the learner's start date this year) >= 8
0	**otherwise**

Learner Age

This element derives the learner's age as at 31st August of the academic year in question.

the learner's age at 31st August = the number of years between the learner's date of birth and MakeDate(ExtractYear(the first day of the current funding year), 8, 31)

Date Rules for Condition of Funding

The Learning Delivery is a Valid Start for CoF

The learning delivery is counted as a start this year if the actual learning delivery this year meets the appropriate number of thresholds days – which is based on the planned learning this year.

the learning delivery is a start if

the learning delivery's qualifying period in days >0 and
the learning delivery's actual number of days >= the learning delivery's qualifying period in days

the learning delivery is a valid start for CoF if

the learning delivery is a start

Learning Delivery Qualifying Period

This element calculates the qualifying period of the learning delivery based on the planned duration of the qualification.

the learning delivery's qualifying period in days	
42	the learning delivery's planned number of days >= 168
14	the learning delivery's planned number of days >= 14
0	**otherwise**

Learning Delivery Planned Days

This element calculates the learning delivery planned programme duration as the difference between the learning delivery start date and the learning delivery planned end date.

the learning delivery's planned number of days	
DayDifferenceInclusive(the learning delivery's learning start date, the learning delivery's planned end date this year)	the learning delivery's learning start date is currently known and the learning delivery's planned end date this year is certain and the learning delivery's planned end date this year is on or later than the learning delivery's learning start date
0	**otherwise**

Learning Delivery's Actual Days

This element calculates the learning delivery's actual programme duration as the difference between the learning delivery's start date and their actual end date.

the learning delivery's actual number of days	
DayDifferenceInclusive(the learning delivery's learning start date, the learning delivery's adjusted actual end date)	the learning delivery's learning start date is certain and the learning delivery's adjusted actual end date is certain and the learning delivery's adjusted actual end date is on or later than the learning delivery's learning start date
0	**otherwise**

Planned End Date Calculation

The planned end date used in the planned duration elements is adjusted to the planned end date to the end of the academic year if it falls after the end of the academic year.

the learning delivery's planned end date this year	
uncertain	the learning delivery's learning start date is later than the last day of the current funding year
the last day of the current funding year	the learning delivery's learning planned end date is later than the last day of the current funding year
the learning delivery's learning planned end date	the learning delivery's learning planned end date is currently known
uncertain	**otherwise**

EFA and Core Aim Selection

There can be more than one core aim in a learner's dataset in one academic year, therefore a set of logic is applied to pick the latest core aim in the set. This achieved in 4 steps.

Step 1 identifies the core aim(s) from all the learner's aims.

the learning delivery is a core aim if

the learning delivery's aim type = 5

the learning delivery is a member of the learner's core aims if

the learning delivery is a member of the learner's EFA learning deliveries and
the learning delivery is a core aim

Learner's Number of Core Aims

Step 2 calculates how many core aims are in the learner's dataset - some learners in the annual school census may not have a core aim identified. Where this is the case the core aim records count will be set to 0 and these learner's will receive a programme cost weighting of 1. This element is also used to determine the academic/vocational status of the learner.

the learner's number of core aim records stage 1 = the number of the learner's core aims

the learner's number of core aim records	
the learner's number of core aim records stage 1	the learner's number of core aim records stage 1 is currently known
0	**otherwise**

Learner's Latest Core Aim

Step 3 picks the latest core aim from the learner's dataset using the core aims start date.

the learner's latest core aim start date	
the learning delivery's learning start date which is the latest for all of the learner's core aims	the learner's number of core aim records > 0
uncertain	**otherwise**

Core Aim Sequence Number

Step 4 then extracts the aim sequence number for the latest core aim selected in step 3. The aim sequence number is used as a key identifier in many other elements of the funding calculation.

the learner's latest core aim sequence number	
the learning delivery's aim sequence number which is the greatest for all of the learner's core aims for which it is the case that the learning delivery's learning start date = the learner's latest core aim start date	the learner's number of core aim records > 0
0	**otherwise**

EFA Aim Selection

the learning delivery is a member of the learner's EFA learning deliveries if

the learning delivery is a member of the learner's learning deliveries and
the learning delivery's funding model = 25

Annex 1 – Derivations

Programme cost weightings by sector subject area (SSA)

SSA tier 2 code	SSA tier 2 description	Programme cost weighting banding	Programme cost weighting factor
1	Health, public services and care	Base	1
1.1	Medicine and dentistry	Base	1
1.2	Nursing and subjects and vocations allied to medicine	Base	1
1.3	Health and social care	Base	1
1.4	Public services	Base	1
1.5	Child development and wellbeing	Base	1
2	Science and mathematics	Base	1
2.1	Science	Base	1
2.2	Mathematics and statistics	Base	1
3	Agriculture, horticulture, and animal care	High/specialist[1]	1.3/1.75
3.1	Agriculture	High/specialist	1.3/1.75
3.2	Horticulture and forestry	High/specialist	1.3/1.75
3.3	Animal care and veterinary science	High/specialist	1.3/1.75
3.4	Environmental conservation	High/specialist	1.3/1.75
4	Engineering and manufacturing technologies	Medium	1.2
4.1	Engineering	High	1.3
4.2	Manufacturing technologies	High	1.3

[1] The high weighting (30%) will include non-specialist agriculture and animal care. The specialist weighting (75%) will apply where there is a requirement to run specialist facilities such as a farm or equine stables.

SSA tier 2 code	SSA tier 2 description	Programme cost weighting banding	Programme cost weighting factor
4.3	Transportation operations and maintenance	Medium	1.2
5	Construction, planning and the built environment	Medium	1.2
5.1	Architecture	Medium	1.2
5.2	Building and construction	Medium	1.2
6	Information and communication technology	Base	1
6.1	ICT practitioners	Medium	1.2
6.2	ICT for users	Base	1
7	Retail and commercial enterprise	Medium	1.2
7.1	Retailing and wholesaling	Medium	1.2
7.2	Warehousing and distribution	Base	1
7.3	Service enterprises	Medium	1.2
7.4	Hospitality and catering	Medium	1.2
8	Leisure, travel and tourism	Base	1
8.1	Sport, leisure and recreation	Base	1
8.2	Travel and tourism	Base	1
9	Arts, media and publishing	Base	1
9.1	Performing arts	Medium	1.2
9.2	Crafts, creative arts and design	Medium	1.2
9.3	Media and communication	Base	1
9.4	Publishing and information services	Base	1
10	History, philosophy and theology	Base	1
10.1	History	Base	1
10.2	Archaeology and archaeological sciences	Base	1

SSA tier 2 code	SSA tier 2 description	Programme cost weighting banding	Programme cost weighting factor
10.3	Philosophy	Base	1
10.4	Theology and religious studies	Base	1
11	Social Sciences	Base	1
11.1	Geography	Base	1
11.2	Sociology and social policy	Base	1
11.3	Politics	Base	1
11.4	Economics	Base	1
11.5	Anthropology	Base	1
12	Languages, literature and culture	Base	1
12.1	Languages, literature and culture of the British Isles	Base	1
12.2	Other languages, literature and culture	Base	1
12.3	Linguistics	Base	1
13	Education and training	Medium	1.2
13.1	Teaching and lecturing	Medium	1.2
13.2	Direct learning support	Medium	1.2
14	Preparation for life and work	Base	1
14.1	Foundations for learning and life	Base	1
14.2	Preparation for work	Base	1
15	Business, administration and law	Base	1
15.1	Accounting and finance	Base	1
15.2	Administration	Base	1
15.3	Business management	Base	1
15.4	Marketing and sales	Base	1
15.5	Law and legal services	Base	1

Area costs uplift by region

London A – 1.20	London B – 1.12
Camden	Barking and Dagenham
City of London	Barnet
Fulham	Bexley
Greenwich	Brent
Hackney	Bromley
Hammersmith	Croydon
Haringey	Ealing
Islington	Enfield
Kensington and Chelsea	Harrow
Lambeth	Havering
Lewisham	Hillingdon
Newham	Hounslow
Southwark	Kingston upon Thames
Tower Hamlets	Merton
Wandsworth	Redbridge
Westminster	Richmond upon Thames
	Sutton
	Waltham Forest

Bedfordshire and Hertfordshire non-fringe – 1.03	
Bedford	North Hertfordshire
Central Bedfordshire	Stevenage
Luton	

Berkshire, Surrey, and West Sussex fringe – 1.12	
Bracknell Forest	Slough

Berkshire, Surrey, and West Sussex fringe – 1.12	
Crawley	Spelthorne
Elmbridge	Surrey County Council
Epsom and Ewell	Surrey Heath
Guildford	Tandridge
Mole Valley	Waverley
Reigate and Banstead	Windsor and Maidenhead
Runnymede	Woking

Berkshire non-fringe – 1.12	
Reading	Wokingham
West Berkshire	

Buckinghamshire non-fringe – 1.07	
Aylesbury Vale	Wycombe
Milton Keynes	

Cambridgeshire – 1.02	
Cambridge	Huntingdonshire
East Cambridgeshire	Peterborough
Fenland	South Cambridgeshire

Hampshire and Isle of Wight – 1.02	
Basingstoke and Deane	Isle of Wight
East Hampshire	New Forest
Eastleigh	Portsmouth
Fareham	Rushmoor
Gosport	Southampton
Hampshire County Council	Test Valley

Hart	Winchester
Havant	

Hertfordshire and Buckinghamshire fringe – 1.10	
Broxbourne	South Buckinghamshire
Chiltern	St Albans
Dacorum	Three Rivers
East Hertfordshire	Watford
Hertsmere	Welwyn Hatfield

Kent and Essex fringe – 1.06	
Basildon	Harlow
Brentwood	Sevenoaks
Dartford	Thurrock
Epping Forest	

Oxfordshire – 1.07	
Cherwell	South Oxfordshire
Oxford	Vale of White Horse
Oxfordshire County Council	West Oxfordshire

West Sussex non-fringe – 1.01	
Adur	Horsham
Arun	Mid-Sussex
Chichester	Worthing

Annex 2 - Changelog

Education & Skills
Funding Agency

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