Education & Skills
Funding Agency

Funding calculation for young people 2022 to 2023

Technical specification v1.00

October 2022

Contents

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 2022 to 2023 (hereafter academic years will be referred to in the format 2022/23).

The 2022/23 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 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:

1. Section 1 provides a description of each element of ESFA funding for young people formula around which the calculation is based.

2. Section 2 is a crib sheet, a guide for readers on how to understand and interpret the structure and the format of OPM rules.

3. Section 3 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.

4. Section 4 details the business rules that define 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

This section aims to describe each element of ESFA funding formula for young people. The funding formula is shown below.

(Student numbers × National funding rate per student × Retention factor × Programme cost weighting + L3 programme maths and English funding + Disadvantage funding + Large programme uplift) × Area cost uplift = Total programme funding

The principles outlined in the funding guidance for young people 2022 to 2023 are reflected in the 2022/23 funding calculation and it is important to note that, both historic and in-year elements are used to calculate funding.

Several data items that you return in your 2022/23 data will not be directly used in the calculation of funding for the 2022/23 academic year but will be used in determining critical elements of your 2024/25 allocation. The funding calculation also outputs some future variables to help illustrate how this data might impact your 2024/25 allocation and this section will indicate where this is the case.

The outputs of the 2022/23 funding calculation may be used to determine aspects of forward allocations. If any of these elements are used, and how they will be used, will be determined during the course of the development of the 2023/24 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.

For study programmes and T Level transition programmes, funding bands are based on the sum of the two fields ***Planned learning hours*** and ***Planned employability, enrichment and pastoral hours*** recorded in your 2022/23 data. T Level funding bands are based on the occupational specialism recorded for the T Level programme. Where the ***Planned hours*** recorded against the T Level programme aim are lower than the minimum hours for this band, the funding band will be lowered to the appropriate band based on ***Planned hours***. 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 (T Levels)

Band	Timetabled hours for the programme		National funding rate per student
9 - very large T Levels	1,730 hours	16, 17 and 18 year old students	£13,068
8 - large T Levels	1,580 hours	16, 17 and 18 year old students	£11,982
7 - medium T Levels	1,380 hours	16, 17 and 18 year old students	£10,896
6 - small T Levels	1,180 hours	16, 17 and 18 year old students	£9,446

Table 1a – National rate per band (study programmes)

Band	Annual timetabled hours		National funding rate per student
5	580+ hours	16 and 17 year olds Students aged 18 and over with high needs	£4,542
4a	485+ hours	Students aged 18 and over who are not high needs	£3,757
4b	485 to 579 hours	16 and 17 year olds Students aged 18 and over with high needs	£3,757
3	385 to 484 hours		£3,056
2	300 to 384 hours		£2,416
1	Up to 299 hours		£4,542 per full time equivalent (FTE)

Qualifying period to count as a start

The planned programme length is calculated using the earliest start date and latest planned end date of all the aims within a study programme. Similarly, the actual length used to calculate whether the student has met the qualifying period uses the earliest start date and latest actual/planned end date of all the aims within a study programme.

Table 2 – Criteria to count as a start

Study programme planned hours and planned length in-year		Qualifying Period
485 hours or more		6 weeks (42 days)
Fewer than 485 hours	>= 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 2020/21 data. It is fed into the funding calculation through a reference data lookup which is updated by ESFA with the factors used in your funding allocation.

Retention is calculated using the individual student's core aim and differs depending on whether the student's programme is academic or vocational.

T Levels are recorded as a 2-year programme, with retention calculated on an annual basis. When students are on a 2-year programme and they complete the first year, they will be counted as retained in that academic year. We define completing the first year as being in learning on the last working day in June. The same principle applies in the second year.

T Level and transition programmes are treated as vocational for calculation purposes.

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's completion status	Percentage of annual funding earned
Student retained and is recorded as completed	100%

For vocational programmes (including T Levels and transition programmes), the student retention status is determined by the completion status of the core aim. For academic programmes, if the core aim is not retained, but another aim is, then we use the aim that is retained.

A future retention indicator (calculated from your 2022/23 data) will be output by the funding calculation for your information. 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 2020/21 data. It is fed into the funding calculation through a reference data lookup which is updated by 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 from your 2020/21 data.

Where a student's programme is academic the programme cost weighting is set to 1, with one exception. The exception relates to a study programme consisting of 2 or more Science A levels, where a (1.1) programme cost weighting will apply.

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.

L3 programme maths and English

L3 programme maths and English funding is calculated from your 2020/21 data:

Students are eligible for additional funding in the first year of a level 3 programme when they have not yet attained a GCSE grade 9 to 4 (or equivalent) in maths and/or English, and their study programme meets at least one of these criteria:

a. it includes at least 2 A levels

b. it includes a level 3 qualification of at least 360 guided learning hours (GLH)

c. it is a T Level

There are different funding rates for 1-year and 2-year programmes, so the funding calculation distinguishes between the two.

This is calculated for each subject that a student does not hold a GCSE pass grade. This means that a student who has not passed **either** English or maths will receive one instance, and those without **both** GCSEs will receive 2 instances.

For students on 2-year programmes, as long as they are continuing at the end of their first year then we pay the whole 2-year rate in the first year of their programme. Otherwise we pay the rate for a 1-year programme.

Disadvantage funding

Disadvantage funding is calculated in 2 blocks from your 2020/21 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 2019) derived from their home postcode from your 2020/21 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 uplift factors and postcode files data service website:

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 the number 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 by your 2021/22 student numbers and split between full-time and part-time.

Full-time students are multiplied by a rate of £504 and part time students are multiplied by a rate of £307 to produce a cash amount.

To make the disadvantage element of the funding calculation proportionate to the delivery in 2022/23, it is represented as a percentage. This percentage is calculated as the total block 1 and block 2 elements of your 2022/23 allocation as a proportion of the total programme funding (less disadvantage and before area cost) from your 2022/23 allocation. This percentage is then applied to each student's funding as an uplift (DisadvantageProportionHistoric). As this factor is calculated using funding elements from your allocation, any 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 is calculated from the last full year's attainment data (from the 2019/20 Young Peoples Matched Administrative Dataset, YPMAD) for the 2022/23 allocations.

The large programme uplift reflects that some study programmes are 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 2022/23, it is represented as a percentage This percentage is calculated as a proportion of the total programme funding (less large programmes and before area cost) from your 2022/23 allocation. This percentage is then applied to each student's funding as an uplift (HistoricLargeProgrammeProportion). As this factor is calculated using funding elements from your allocation, any in-year changes to your allocation are likely to change the large programme uplift proportion which will feed through to the funding calculation.

Further information about the large programme uplift can be found in the 16 to 19 funding large programme uplift guidance.

Area cost factor

The area cost factor is an institution level factor calculated from your 2020/21 data. It is fed into the funding calculation through a lookup which is updated by ESFA based on the factors used in your funding allocation.

A full list of area costs can be found at annex 1.

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.

Funding is not adjusted in the 2022/23 ESFA funding calculation for young people because of the condition of funding, instead, the prior attainment and in-year study of English and mathematics of each student in 2022/23 data will affect the allocation of each institution for 2024/25.

To help institutions identify 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
Has Maths below GCSE grade D or grade 3, holds Maths FSL2 pass	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
Has English below GCSE grade D or grade 3, holds English FSL2 pass	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 about the condition of funding on maths and English can be found in the 16 to 19 funding: maths and English condition of funding guidance.

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,

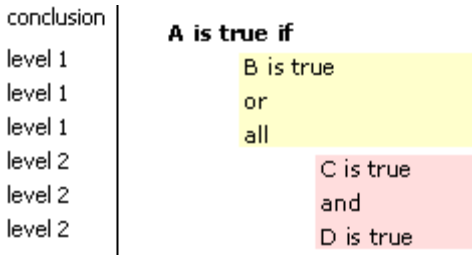
Example 1	Example 2
the person is eligible for a pension if:	the person is eligible for a pension if:
the person is over 65.	the person is over 65.
AND	OR
the person is a citizen.	the person is unable to work.

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.

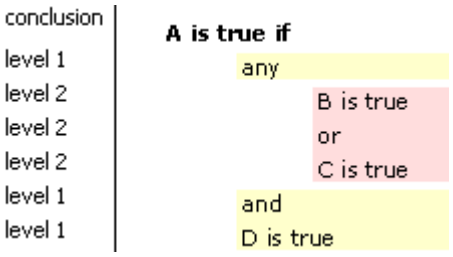
In Example 2, either the first or second condition, or both, must be true to be able to draw a positive outcome. If both the conditions are proved false, then a negative outcome is drawn.

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:



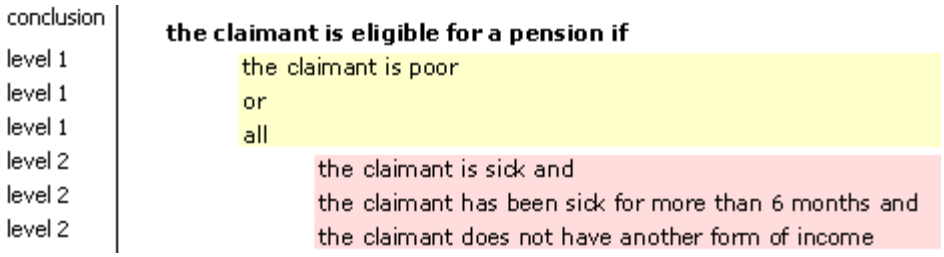
The **any** operator is used to group conditions separated by **or**. In the example "A if (B or C) and D" the brackets are around the conditions joined by an **or** so you must use the **any** operator in your rule:



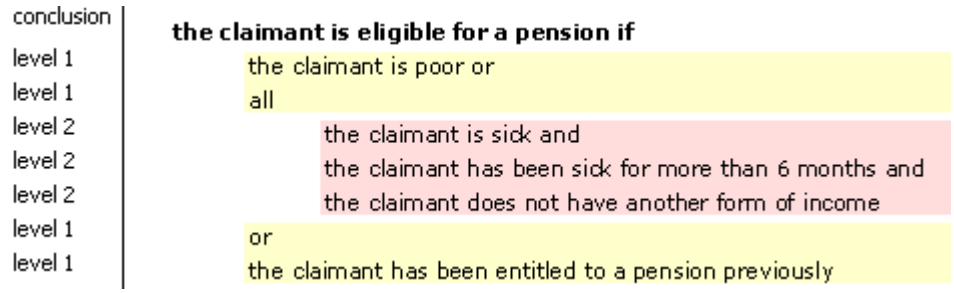
NOTE: You may also use the word **both** in place of **all** and **either** in place of **any**. Using these words has the same effect but may make the text more readable where only 2 conditions are grouped.

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 (OPM) 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.

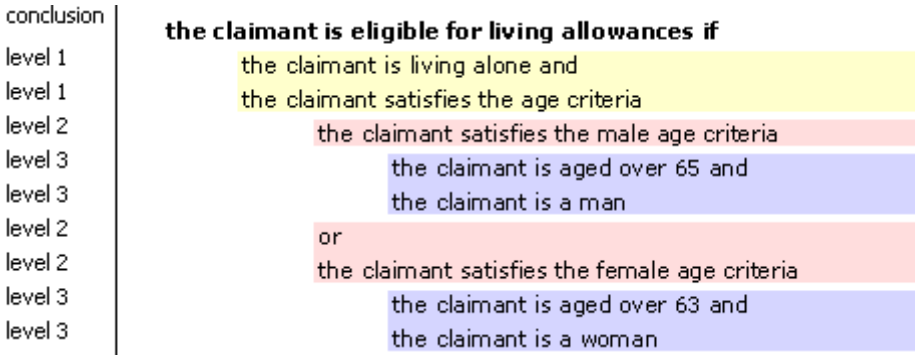
The alternative conclusion need not be stated, it is assumed in all rules unless otherwise indicated.

Understand Oracle Policy Modelling format and structure

OPM format is quite strict 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 OPM 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 OPM 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, for example 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 (for example 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	Pass through	Key	Type	Source	OPA Name
AreaCostFactor1618			number	AreaCostFactor1618 = ReferenceInput.Organisations_OrganisationFunding.OrgFundFactValue using ReferenceInput.Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput.Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput.Organisations_Organisation.Id = ReferenceInput.Organisations_OrganisationFunding. Organisations_Organisation_Id and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactor = "HISTORIC AREA COST FACTOR" and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19" and ReferenceInput.Organisations_OrganisationFunding.Effectivefrom = "01 Aug 2022"	the provider's 16-18 area cost factor
Level3ProgMathsandEnglishProportion			Number	Level3ProgMathsandEnglish proportion = ReferenceInput.Organisations_OrganisationFunding.OrgFundFactValue using ReferenceInput.Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput.Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput.Organisations_Organisation.Id = ReferenceInput.Organisations_OrganisationFunding. Organisations_Organisation_Id and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactor	the provider’s level 3 maths and English proportion

Public Name	Pass through	Key	Type	Source	OPA Name
				= "HISTORIC LEVEL 3 PROGRAMME MATHS AND ENGLISH PROPORTION " and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19" and ReferenceInput.Organisations_OrganisationFunding.Effectivefrom = "01 Aug 2022"	
DisadvantageProportion			number	DisadvantageProportion = ReferenceInput.Organisations_OrganisationFunding.OrgFundFactValue using ReferenceInput.Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput.Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput.Organisations_Organisation.Id = ReferenceInput.Organisations_OrganisationFunding. Organisations_Organisation_Id and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactor = "HISTORIC DISADVANTAGE FUNDING PROPORTION" and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19" and ReferenceInput.Organisations_OrganisationFunding.Effectivefrom = "01 Aug 2022"	the provider's disadvantage proportion
HistoricLargeProgrammeProportion			number	HistoricLargeProgrammeProportion = ReferenceInput.Organisations_OrganisationFunding.OrgFundFactValue using ReferenceInput.Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput.Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput.Organisations_Organisation.Id = ReferenceInput.Organisations_OrganisationFunding. Organisations_Organisation_Id and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactor = "HISTORIC LARGE PROGRAMME PROPORTION" and	the provider's historic large programme proportion

Public Name	Pass through	Key	Type	Source	OPA Name
				ReferenceInput.Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19" and ReferenceInput.Organisations_OrganisationFunding.Effectivefrom = "01 Aug 2022"	
LARSVersion	Yes		text	ReferenceInput.LARS_Current_Version.CurrentVersion	the LARS reference data version
OrgVersion	Yes		text	ReferenceInput.Org_Current_Version.CurrentVersion	the Org reference data version
ProgrammeWeighting			number	ProgrammeWeighting = ReferenceInput.Organisations_OrganisationFunding.OrgFundFactValue using ReferenceInput.Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput.Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput.Organisations_Organisation.Id = ReferenceInput.Organisations_OrganisationFunding.Organisations_Organisation_Id and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactor = "HISTORIC PROGRAMME COST WEIGHTING FACTOR" and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19" and ReferenceInput.Organisations_OrganisationFunding.Effectivefrom = "01 Aug 2022"	the provider's programme weighting
RetentionFactor			number	RetentionFactor = ReferenceInput.Organisations_OrganisationFunding.OrgFundFactValue using ReferenceInput.Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput.Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput.Organisations_Organisation.Id = ReferenceInput.Organisations_OrganisationFunding.Organisations_Organisation_Id and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactor	the provider's retention factor

Public Name	Pass through	Key	Type	Source	OPA Name
				= "HISTORIC RETENTION FACTOR" and ReferenceInput.Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19" and ReferenceInput.Organisations_OrganisationFunding.Effectivefrom = "01 Aug 2022"	
SpecialistResources			boolean	SpecialistResources = “True” when ReferenceInput.Organisations_OrganisationFunding.OrgFundFactorValue = 1 using ReferenceInput. Organisations_OrganisationFunding using ReferenceInput. Organisations_Organisation on ReferenceInput. Organisations_Organisation.UKPRN = LearningProvider.UKPRN and ReferenceInput. Organisations_OrganisationFunding.OrgFundFactor = "SPECIALIST RESOURCES" and ReferenceInput. Organisations_OrganisationFunding.OrgFundFactType = "EFA 16-19"	the provider has specialist resources
UKPRN	Yes	Yes	number	ILR	the provider's UKPRN
PostcodeDisadvantageVersion	Yes		text	ReferenceInput.MetaData_PostcodeFactorsVersion ReferenceInput.	the postcode disadvantage reference data version

Learner

Public Name	Pass through	Key	Type	Source	OPA Name
LearnRefNumber	Yes	Yes	text	ILR	the learner's learner reference number
ULN			number	ILR	the learner's unique learner number
DateOfBirth			date	ILR	the learner's date of birth
EngGrade			text	ILR	the learner's GCSE English qualification grade
MathGrade			text	ILR	the learner's GCSE Maths qualification grade
LrnFAM_ECF			number	ILR	the learner's ECF FAM code
LrnFAM_EDF1			number	ILR	the learner's EDF FAM code 1
LrnFAM_EDF2			number	ILR	the learner's EDF FAM code 2
LrnFAM_EHC			number	ILR	the learner's EHC FAM code
LrnFAM_HNS			number	ILR	the learner's HNS FAM code
LrnFAM_MCF			number	ILR	the learner's MCF FAM code
LrnFAM_NLM1			number	ILR	the learner's NLM FAM code 1
LrnFAM_NLM2			number	ILR	the learner's NLM FAM code 2

Public Name	Pass through	Key	Type	Source	OPA Name
PlanEEPHours			number	ILR	the learner's planned employability, enrichment and pastoral hours
PlanLearnHours			number	ILR	the learner's planned learning hours
PostcodeDisadvantageUplift			number	PostcodeDisadvantageUplift = ReferenceInput.FM25_PostcodeDisadvantage.Uplift using ReferenceInput.FM25_PostcodeDisadvantage on ReferenceInput.FM25_PostcodeDisadvantage.Postcode = Learner.Postcode or ReferenceInput.FM25_PostcodeDisadvantage.Postcode = "ZZ99 9ZZ" Use main address uplift unless Postcode matches "ZZ99 9ZZ", in which case use temporary address uplift	the learner's postcode disadvantage uplift

LearningDelivery

Public Name	Pass through	Key	Type	Source	OPA Name
LearnAimRef			text	ILR	the learning delivery's learning aim reference
AimType			number	ILR	the learning delivery's aim type
AimSeqNumber			number	ILR	the learning delivery's aim sequence number
FundModel			number	ILR	the learning delivery's funding model

Public Name	Pass through	Key	Type	Source	OPA Name
ProgType			number	ILR	the learning delivery's programme type
LearnStartDate			date	ILR	the learning delivery's learning start date
LearnPlanEndDate			date	ILR	the learning delivery's learning planned end date
LearnActEndDate			date	ILR	the learning delivery's learning actual end date
CompStatus			number	ILR	the learning delivery's completion status
WithdrawReason			number	ILR	the learning delivery's withdrawal reason
LearnAimRefTitle			text	LearnAimRefTitle = ReferenceInput.LARS_LearningDelivery.LearnAimRefTitleusing ReferenceInput.LARS_LearningDelivery on LARS_LearningDelivery.LearnAimRef = LearningDelivery.LearnAimRef	the learning delivery's learning aim reference title
LearnAimRefType			text	LearnAimRefType = ReferenceInput.LARS_LearningDelivery.LearnAimRefType using ReferenceInput.LARS_LearningDelivery on LARS_LearningDelivery.LearnAimRef = LearningDelivery.LearnAimRef	the learning delivery's learning aim reference type
AwardOrgCode			text	AwardOrgCode = ReferenceInput.LARS_LearningDelivery.AwardOrgCode using ReferenceInput.LARS_LearningDelivery on LARS_LearningDelivery.LearnAimRef = LearningDelivery.LearnAimRef	the learning delivery's awarding organisation code

Public Name	Pass through	Key	Type	Source	OPA Name
EFACOFType			number	EFACOFType = ReferenceInput.LARS_LearningDelivery.EFACOFType using ReferenceInput.LARS_LearningDelivery on LARS_LearningDelivery.LearnAimRef = LearningDelivery.LearnAimRef	the ESFA Condition of funding type
SectorSubjectAreaTier2			number	SectorSubjectAreaTier2 = ReferenceInput.LARS_LearningDelivery.SectorSubjectAreaTier2 using ReferenceInput.LARS_LearningDelivery on LARS_LearningDelivery.LearnAimRef = LearningDelivery.LearnAimRef	the learning delivery's sector subject area tier 2
NotionalNVQLevel			number	ReferenceInput.LARS_Validity. Validity.NotionalNVQLevel = 3 using ReferenceInput.LARS_Validity on ReferenceInput.LARS_Validity.LearnAimRef = LearningDelivery.LearnAimRef	the LARS validity's notional NVQ level
GuidedLearningHours			number	ReferenceInput.LARS_Validity. Validity.GuidedLearningHours >= 360 using ReferenceInput.LARS_Validity on ReferenceInput.LARS_Validity.LearnAimRef = LearningDelivery.LearnAimRef	the LARS validity's guided learning hours
PHours			number	ILR	the learning delivery’s planned hours

LearningDeliveryLARSValidity

Public Name	Pass through	Key	Type	Source	OPA Name
ValidityCategory			text	ValidityCategory = ReferenceInput.LARS_Validity.ValidityCategory using ReferenceInput.LARS_Validity on ReferenceInput.LARS_Validity.LearnAimRef = LearningDelivery.LearnAimRef	the LARS validity's category
ValidityLastNewStartDate			date	ValidityLastNewStartDate = ReferenceInput.LARS_Validity.ValidityLastNewStartDate using ReferenceInput.LARS_Validity on ReferenceInput.LARS_Validity.LearnAimRef = LearningDelivery.LearnAimRef	the LARS validity's last date for new starts
ValidityStartDate			Date	ValidityStartDate = ReferenceInput.LARS_Validity.ValidityStartDate using ReferenceInput.LARS_Validity on ReferenceInput.LARS_Validity.LearnAimRef = LearningDelivery.LearnAimRef	the LARS validity's start date

LearningDeliveryLARSProgrammeFunding

Public Name	Pass through	Key	Type	Source	OPA Name
TlevelFundingBand			Number	TlevelFundingBand = ReferenceInput.LARS_Programme_Funding.FundingBand using ReferenceInput.LARS_Programme_Funding on LearningDelivery.ProgType = 31 and LARS_Programme_Funding.ProgrammeCode = LearningDelivery.FWorkCode and LARS_Programme_Funding.PWayCode = LearningDelivery.PWayCode and LARS_Programme_Funding.ProgType = LearningDelivery.ProgType	
TlevelPCW			Number	TlevelPCW = ReferenceInput.LARS_Programme_Funding.ProgrammeCostWeightingFactor using ReferenceInput.LARS_Programme_Funding on LearningDelivery.ProgType = 31 and LARS_Programme_Funding.ProgrammeCode = LearningDelivery.FWorkCode and LARS_Programme_Funding.PWayCode = LearningDelivery.PWayCode and LARS_Programme_Funding.ProgType = LearningDelivery.ProgType	
EffectiveFrom			Date	EffectiveFrom = ReferenceInput.LARS_Programme_Funding.EffectiveFrom using ReferenceInput.LARS_Programme_Funding on LearningDelivery.ProgType = 31 and LARS_Programme_Funding.ProgrammeCode = LearningDelivery.FWorkCode and LARS_Programme_Funding.PWayCode = LearningDelivery.PWayCode and LARS_Programme_Funding.ProgType = LearningDelivery.ProgType	
EffectiveTo			Date	EffectiveTo = ReferenceInput.LARS_Programme_Funding.EffectiveTo using ReferenceInput.LARS_Programme_Funding on LearningDelivery.ProgType = 31 and LARS_Programme_Funding.ProgrammeCode = LearningDelivery.FWorkCode and LARS_Programme_Funding.PWayCode = LearningDelivery.PWayCode and LARS_Programme_Funding.ProgType = LearningDelivery.ProgType	

DPOutcome

Public Name	Pass through	Key	Type	Source	OPA Name
OutCode			number	ILR	the learner destination and progression outcomes code
OutType			text	ILR	the learner destination and progression outcomes type

LearningDeliveryFAM

Public Name	Pass through	Key	Type	Source	OPA Name
LearnDelFAMCode			text	ILR	the learning delivery FAM's code
LearnDelFAMDateFrom			date	ILR	the learning delivery FAM's date applies from
LearnDelFAMDateTo			date	ILR	the learning delivery FAM's date applies to
LearnDelFAMType			text	ILR	the learning delivery FAM's type

Outputs

Global

Public Name	Passed Through	Key	Type	Size	Precision	OPA Name
RulebaseVersion			text	10		the current version of the rulebase
UKPRN	Yes	Yes	number			the provider's UKPRN
LARSVersion	Yes		text	10		the LARS reference data version
OrgVersion	Yes		text	10		the Org reference data version

Learner

Public Name	Passed Through	Key	Type	Size	Precision	OPA Name
LearnRefNumber	Yes	Yes	text	12		the learner's learner reference number
AcadMonthPayment			number			the learner's payment period
AcadProg			boolean			the learner is studying an academic programme
ActualDaysILCurrYear			number			the learner's actual number of days this funding year
AreaCostFact1618Hist			number	10	5	the provider's historic 16-18 area cost factor
Block1DisadvUpliftNew			number	10	5	the learner's new block 1 disadvantage uplift
Block2DisadvElementsNew			number	10	5	the learner's new block 2 disadvantage elements
ConditionOfFundingEnglish			text	100		the learner's English condition of funding status
ConditionOfFundingMaths			text	100		the learner's Mathematics condition of funding status
CoreAimSeqNumber			number			the learner's latest core aim sequence number
FullTimeEquiv			number	10	5	the learner's FTE
FundLine			text	100		the learner's funding line type

Public Name	Passed Through	Key	Type	Size	Precision	OPA Name
LearnerActEndDate			date			the learner's actual end date
LearnerPlanEndDate			date			the learner's planned end date
LearnerStartDate			date			the learner's start date
NatRate			currency	10	5	the learner's national rate
OnProgPayment			currency	10	5	the learner's on-programme funding
PlannedDaysILCurrYear			number			the learner's planned number of days this funding year
ProgWeightHist			number	10	5	the provider's historic programme weighting
ProgWeightNew			number	10	5	the learner's new programme weighting
PrvDisadvPropnHist			number	10	5	the provider's historic disadvantage proportion
PrvHistLrgProgPropn			number	10	5	the provider's large programme proportion
PrvRetentFactHist			number	10	5	the provider's historic retention factor
historic Level3ProgMathsandEnglish proportion			number	10	5	The provider’s historic level 3 maths and English proportion
RateBand			text	50		the learner's rate band
RetentNew			number	10	5	the learner's new retention status
StartFund			boolean			the learner is a start
ThresholdDays			number			the learner's qualifying period in days
TLevelStudent			boolean			The learner is a T level student
TransitionStudent			Boolean			The learner is a Transition student
TraineeshipStudent			Boolean			The learner is a Traineeship student
AlternateRateBand			Boolean			The learner has an alternate rate band applied
TLevelAdditionalHours			Number	2	0	The T level Learner has 40 or 80 additional hours
Year1ofTlevelStudyProgramme			Boolean			The T level learner is a year 1 student
Year2ofTlevelStudyProgramme			Boolean			The T level learner is a year 2 student
Year3ofTlevelStudyProgramme			Boolean			The T level learner is a year 3+ student

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 (16-19 (excluding Apprenticeships)), 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 and transition programmes, but excludes T Levels). 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 ESFA 16-19 where at least one of the learner's aims is ESFA 16-19 funded, where no ESFA 16-19 funded aims are found if the learner has at least one ESFA Adult funded aim the learner is set to ESFA Adult funded otherwise a value of Other is returned.

the learner's source of funding	
"ESFA 16-19"	for at least one of the learner's ESFA learning deliveries for at least one of the learning delivery FAMs the learning delivery FAM's type = "SOF" and the learning delivery FAM's code = "107"
"ESFA Adult"	for at least one of the learner's ESFA learning deliveries for at least one of the learning delivery FAMs the learning delivery FAM's type = "SOF" and the learning delivery FAM's code = "105"
"Other"	**Otherwise**

Funding Line Type

the learner's funding line type	
"14-16 Direct Funded Students"	the learner's source of funding = "ESFA 16-19" 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 ESFA 16-19 learning deliveries the learning delivery is Direct Funded
"16-19 High Needs Students"	the learner's source of funding = "ESFA 16-19" 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 = "ESFA 16-19" 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 = "ESFA 16-19" 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
"19+ Continuing Students (excluding EHCP)"	the learner's source of funding = "ESFA 16-19" and the learner's age at 31st August >= 19
"16-18 Traineeships (Adult Funded)"	the learner's source of funding = "ESFA Adult" and the learner's age at 31st August < 19 and for at least one of the learner's ESFA 16-19 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 = "ESFA Adult" and the learner's age at 31st August >= 19 and for at least one of the learner's ESFA 16-19 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

for at least one of the learning delivery FAMs
the learning delivery FAM's type = "LDM" and
the learning delivery FAM's 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) * (1 + Historic Large Programme Proportion) * (1 + Historic L3 maths and English Proportion) * Area Cost Allowance.

the base programme funding = the learner's national rate * the provider's historic retention factor * the provider's historic programme weighting

the learner's on-programme funding	
the base programme funding * (1 + the provider's historic disadvantage proportion) * (1 + the provider's L3 maths and English proportion) * (1 + the provider's large programme proportion) * the provider's historic 16-18 area cost factor	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

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
for at least one of the learning delivery FAMs
the learning delivery FAM's type = "LDM" and
the learning delivery FAM's 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 ESFA 16-19 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 has English below 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 = "E" or
the learner's uppercase GCSE English qualification grade = "F" or
the learner's uppercase GCSE English qualification grade = "G" or
the learner's uppercase GCSE English qualification grade = "U" or
the learner's uppercase GCSE English qualification grade = "X" or
the learner's uppercase GCSE English qualification grade = "NR" or
the learner's uppercase GCSE English qualification grade = "NONE" or
the learner's uppercase GCSE English qualification grade = "2" or
the learner's uppercase GCSE English qualification grade = "1"

the learner has Maths below 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 = "E" or
the learner's uppercase GCSE Maths qualification grade = "F" or
the learner's uppercase GCSE Maths qualification grade = "G" or
the learner's uppercase GCSE Maths qualification grade = "U" or
the learner's uppercase GCSE Maths qualification grade = "X" or
the learner's uppercase GCSE Maths qualification grade = "NR" or
the learner's uppercase GCSE Maths qualification grade = "NONE" or
the learner's uppercase GCSE Maths qualification grade = "2" or
the learner's uppercase GCSE Maths qualification grade = "1"

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 does not have English GCSE Grade D or
  - all
    - the learner has English GCSE Grade D and
    - the learner's rate band <> "1730 hours (T level Band 9)" and
    - the learner's rate band <> "1580 hours (T level Band 8)" and
    - the learner's rate band <> "1380 hours (T level Band 7)" and
    - the learner's rate band <> "1180 hours (T level Band 6)"and
    - the learner's rate band <> "580+ hours (Band 5)" and
    - the learner's rate band <> "485+ 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 = "1730 hours (T level Band 9)" or
  - the learner's rate band = "1580 hours (T level Band 8)" or
  - the learner's rate band = "1380 hours (T level Band 7)" or
  - the learner's rate band = "1180 hours (T level Band 6)"or
  - the learner's rate band = "580+ hours (Band 5)" or
  - the learner's rate band = "485+ hours (Band 4a)"
- and
- the ESFA 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 <> "1730 hours (T level Band 9)" and
the learner's rate band <> "1580 hours (T level Band 8)" and
the learner's rate band <> "1380 hours (T level Band 7)" and
the learner's rate band <> "1180 hours (T level Band 6)"and
the learner's rate band <> "580+ hours (Band 5)" and
the learner's rate band <> "485+ 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 does not have Maths GCSE Grade D or
all
the learner has Maths GCSE Grade D and
the learner's rate band <> "1730 hours (T level Band 9)" and
the learner's rate band <> "1580 hours (T level Band 8)" and
the learner's rate band <> "1380 hours (T level Band 7)" and
the learner's rate band <> "1180 hours (T level Band 6)"and
the learner's rate band <> "580+ hours (Band 5)" and
the learner's rate band <> "485+ 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 = "1730 hours (T level Band 9)" or
the learner's rate band = "1580 hours (T level Band 8)" or
the learner's rate band = "1380 hours (T level Band 7)" or
the learner's rate band = "1180 hours (T level Band 6)"or
the learner's rate band = "580+ hours (Band 5)" or
the learner's rate band = "485+ hours (Band 4a)"
and
the ESFA 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 <> "1730 hours (T level Band 9)" and
the learner's rate band <> "1580 hours (T level Band 8)" and
the learner's rate band <> "1380 hours (T level Band 7)" and
the learner's rate band <> "1180 hours (T level Band 6)"and
the learner's rate band <> "580+ hours (Band 5)" and
the learner's rate band <> "485+ hours (Band 4a)"
and
the learning delivery is Prince's Trust TEAM

the learner is recognised as an English exemption 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 exemption 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 has Functional Skills Level 2 English if

the learner's ECF FAM Code is currently known and
the learner's ECF FAM Code = 5

the learner has Functional Skills Level 2 Mathematics if

the learner's MCF FAM Code is currently known and
the learner's MCF FAM Code = 5

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 = "ESFA Adult"
or
all
the latest programme is a T level and
the learner's latest ESFA 16-19 T level programme aim start date < 2022-08-01

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 exemption
"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
"Has English GCSE Grade D or Grade 3, Not studying GCSE English"	the learner has English GCSE Grade D and either the learner's rate band = "1730 hours (T level Band 9)" or the learner's rate band = "1580 hours (T level Band 8)" or the learner's rate band = "1380 hours (T level Band 7)" or the learner's rate band = "1180 hours (T level Band 6)"or the learner's rate band = "580+ hours (Band 5)" or the learner's rate band = "485+ hours (Band 4a)" and for all of the learner's learning deliveries the learning delivery is not a recognised GCSE English qualification
"Has English below GCSE grade D or grade 3, holds English FSL2 pass"	the learner has Grade D or below English and the learner has Functional Skills Level 2 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
"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 exemption
"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
"Has Maths GCSE Grade D or Grade 3, Not studying GCSE Maths"	the learner has Maths GCSE Grade D and either the learner's rate band = "1730 hours (T level Band 9)" or the learner's rate band = "1580 hours (T level Band 8)" or the learner's rate band = "1380 hours (T level Band 7)" or the learner's rate band = "1180 hours (T level Band 6)"or the learner's rate band = "580+ hours (Band 5)" or the learner's rate band = "485+ hours (Band 4a)" and for all of the learner's learning deliveries the learning delivery is not a recognised GCSE Maths qualification
"Has Maths below GCSE grade D or grade 3, holds Maths FSL2 pass"	the learner has Grade C or above Maths and the learner has Functional Skills Level 2 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
"Doesn't have Maths, Not Studying Maths"	the learner does not have Grade C or above Maths
""	**otherwise**

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

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**

Supporting Rules

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

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: for Study and Transition programmes the combined value of (planned qualification hours plus planned employability, enrichment and pastoral hours); for T levels (planned hours).

The learner's national rate is split into nine bands, four T level, followed by one full time and five part time, based on bands of hours (defined by the learning hours threshold elements).

the learner's rate band	
"1730 hours (T level Band 9)"	the learner is a T level student and the learner's T level Funding Band = 9 and the learner's total planned hours >= the learning hours threshold for T Level band 9 students
"1580 hours (T level Band 8)"	the learner is a T level student and the learner's T level Funding Band >= 8 and the learner's total planned hours >= the learning hours threshold for T Level band 8 students
"1380 hours (T level Band 7)"	the learner is a T level student and the learner's T level Funding Band >= 7 and the learner's total planned hours >= the learning hours threshold for T Level band 7 students
"1180 hours (T level Band 6)"	the learner is a T level student and the learner's T level Funding Band >= 6 and the learner's total planned hours >= the learning hours threshold for T Level band 6 students
"580+ 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 or the learner is a T level student
"485+ 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 and the learner is not a T level student
"485 to 579 hours (Band 4b)"	the learner's total planned hours >= the learning hours threshold for part time band 4 students
"385 to 484 hours (Band 3)"	the learner's total planned hours >= the learning hours threshold for part time band 3 students
"300 to 384 hours (Band 2)"	the learner's total planned hours >= the learning hours threshold for part time band 2 students
"Up to 299 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 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 T Level band 9 students /2	the learner's rate band = "1730 hours (T level Band 9)"
the national rate for T Level band 8 students /2	the learner's rate band = "1580 hours (T level Band 8)"
The national rate for T Level band 7 students /2	the learner's rate band = "1380 hours (T level Band 7)"
the national rate for T Level band 6 students /2	the learner's rate band = "1180 hours (T level Band 6)"
the national rate for full time students	the learner's rate band = "580+ hours (Band 5)"
the national rate for part time band 4 students	the learner's rate band = "485+ hours (Band 4a)" or the learner's rate band = "485 to 579 hours (Band 4b)"
the national rate for part time band 3 students	the learner's rate band = "385 to 484 hours (Band 3)"
the national rate for part time band 2 students	the learner's rate band = "300 to 384 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 299 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	
InstanceValueIf(the learner's ESFA 16-19 T level programme aims, the learning delivery's planned hours, the learner's latest ESFA 16-19 T level programme aim sequence number = the learning delivery's aim sequence number)	for at least one of the learner's ESFA 16-19 learning deliveries the learner's latest programme is a T level and the learning delivery is an ESFA 16-19 T level programme aim and the learning delivery's planned hours is currently known and the T level learner is a year 1 student
InstanceValueIf(the learner's ESFA 16-19 T level programme aims, the learning delivery's planned hours, the learner's latest ESFA 16-19 T level programme aim sequence number = the learning delivery's aim sequence number) + the learner's T level additional hours	for at least one of the learner's ESFA 16-19 learning deliveries the learner's latest programme is a T level and the learning delivery is an ESFA 16-19 T level programme aim and the learning delivery's planned hours is currently known and either the T level learner is a year 2 student or the T level learner is a year 3+ student
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 / 2) / the funded hours per FTE	the learner is a T Level student
the learner's total planned hours / the funded hours per FTE	**otherwise**

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 is an ESFA 16-19 T level programme aim
false	The learning delivery is an ESFA 16-19 T level transition programme 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 (Free Standing Maths Qualification)
true	the learning delivery's learning aim reference type = "1440" or the learning delivery's learning aim reference type = "1460" **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 and critical thinking 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	for at least one of the learner's ESFA 16-19 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 2022/23 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 T level and for at least one of the learner's ESFA 16-19 T level programme aims the learning delivery's aim sequence number = the learner's latest ESFA 16-19 T level 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 any the learning delivery's withdrawal reason = 2 or the learning delivery's withdrawal reason = 7 or the learning delivery's withdrawal reason = 47 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 latest programme is a traineeship and for at least one of the learner's ESFA 16-19 traineeship programme aims the learning delivery's aim sequence number = the learner's latest ESFA 16-19 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 any the learning delivery's withdrawal reason = 2 or the learning delivery's withdrawal reason = 7 or the learning delivery's withdrawal reason = 47 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 ESFA 16-19 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
1	the learner is studying an academic programme and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery is an academic aim and either all the learning delivery's completion status is currently known and the learning delivery's completion status = 3 and the learning delivery's withdrawal reason is currently known and any the learning delivery's withdrawal reason = 2 or the learning delivery's withdrawal reason = 7 or the learning delivery's withdrawal reason = 47 or all the learning delivery's completion status is currently known and the learning delivery's completion status = 3 and the learning delivery's withdrawal reason is currently known and the learning delivery's planned duration >= 18 and the learning delivery's learning start date >= the first day of the current funding year and the learning delivery's learning actual end date >= the two year programme first year end date
1	the learner is not studying an academic programme and for at least one of the learner's ESFA 16-19 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

1	the learner is not studying an academic programme and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and either all the learning delivery's completion status is currently known and the learning delivery's completion status = 3 and the learning delivery's withdrawal reason is currently known and any the learning delivery's withdrawal reason = 2 or the learning delivery's withdrawal reason = 7 or the learning delivery's withdrawal reason = 47 or all the learning delivery's completion status is currently known and the learning delivery's completion status = 3 and the learning delivery's withdrawal reason is currently known and the learning delivery's planned duration >= 18 and the learning delivery's learning start date >= the first day of the current funding year and the learning delivery's learning actual end date >= the two year programme first year end date
0.5	**Otherwise**

the latest programme is a traineeship if

for at least one of the learner's ESFA 16-19 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 ESFA 16-19 Traineeship Programme Aim

There could be more than one ESFA 16-19 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 ESFA 16-19 traineeship programme aim(s) from all the learner's aims.

the learning delivery is an ESFA 16-19 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 ESFA 16-19 traineeship programme aims if

the learning delivery is a member of the learner's learning deliveries and
the learning delivery is an ESFA 16-19 traineeship programme aim

The Learner's Number of ESFA 16-19 Traineeship Programme Aims

Step 2 calculates how many ESFA 16-19 traineeship programme aims are in the learner's dataset.

the learner's number of ESFA 16-19 traineeship programme aim records stage 1 = the number of the learner's ESFA 16-19 traineeship programme aims

the learner's number of ESFA 16-19 traineeship programme aim records	
the learner's number of ESFA 16-19 traineeship programme aim records stage 1	**the learner's number of ESFA 16-19 traineeship programme aim records stage 1 is currently known**
0	**otherwise**

Learner's Latest ESFA 16-19 Traineeship Programme Aim

Step 3 picks the latest ESFA 16-19 Traineeship Programme aim from the learner's dataset using the ESFA 16-19 Traineeship Programme aims start date.

the learner's latest ESFA 16-19 traineeship programme aim start date	
the learning delivery's learning start date which is the latest for all of the learner's ESFA 16-19 traineeship programme aims	the learner's number of ESFA 16-19 traineeship programme aim records > 0
uncertain	**otherwise**

Latest ESFA 16-19 Traineeship Programme Aim Sequence Number

Step 4 then extracts the aim sequence number for the latest ESFA 16-19 traineeship programme aim selected in step 3.

the learner's latest ESFA 16-19 traineeship programme aim sequence number	
the learning delivery's aim sequence number which is the greatest for all of the learner's ESFA 16-19 traineeship programme aims for which it is the case that the learning delivery's learning start date = the learner's latest ESFA 16-19 traineeship programme aim start date	the learner's number of ESFA 16-19 traineeship programme aim records > 0
0	**otherwise**

Historic Retention

This is a lookup value based on the retention factor used for the 2022/23 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 2022/23 data. The learning delivery's programme weighting uses the Sector subject area tier 2 of the core aim recorded in the 2022/23 data (if the learner is academic a default of 1 is set, with one exception. The exception relates to a study programme consisting of 2 or more Science A levels, where a (1.1) programme cost weighting will apply**). 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 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 ESFA 16-19 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	
the learner's T level PCW	the learner's latest programme is a T level
the learner's national T level transition programme PCW	the learner's latest programme is a Transition Programme
1.2	the learner's new programme weighting stage 1 = 1 and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery is Prince's Trust TEAM
the learner's new programme weighting stage 1	**otherwise**

the learner's low PCW criteria	
true	the learner is studying an academic programme and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's Sector subject area tier 2 = 2.1 and the learning delivery is an A level and the learning delivery's learning aim reference type = "1431"
true	the learner is studying an academic programme and the learner's number of A level learning delivery records with SSA 2.1 > 1
true	the learner is not studying an academic programme and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and any the learning delivery's Sector subject area tier 2 = 2.1 or the learning delivery's Sector subject area tier 2 = 1.1 or the learning delivery's Sector subject area tier 2 = 1.2
false	**otherwise**

the learning delivery's programme weighting	
1.1	the learner's low PCW criteria is true
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 = 3.1 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 learning delivery's count of postcode specialist resource reference data records > 0 and for at least one of the learning delivery's postcode specialist resource reference data for delivery location postcode the postcode specialist resource reference data's specialist resources = "Y"
1.75	any 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 learning delivery's count of postcode specialist resource reference data records = 0 and the provider has specialist resources
1.4	the learning delivery's Sector subject area tier 2 = 4.1 or the learning delivery's Sector subject area tier 2 = 4.2 or the learning delivery's Sector subject area tier 2 = 4.3 or the learning delivery's Sector subject area tier 2 = 5.2
1.3	Any 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 = 7.4
1.2	Any the learning delivery's Sector subject area tier 2 = 5.1 or the learning delivery's Sector subject area tier 2 = 5.3 or the learning delivery's Sector subject area tier 2 = 6.1 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 = 9.1 or the learning delivery's Sector subject area tier 2 = 9.2 or the learning delivery's Sector subject area tier 2 = 13.1 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 2022/23 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 2022/23 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 Large Programme used for the 2022/23 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 learners 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 learners 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 learners 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**

Specialist Resources

Determines that the date of the Campus Funding is known and useable.

the campus funding's applicable effective to date	
the date 1 day after the campus funding's effective to date	the campus funding's effective to date is currently known and the campus funding's effective to date is certain
Latest()	**otherwise**

Creates a temporal variable for all the specialist resource flags based on all the Campus Funding entities

the learner's campus specialist resource flags = TemporalFromRange(the campus funding for the learner, the campus funding's effective from date, the campus funding's applicable effective to date, the campus funding's specialist resources)

Finds the date the campus funding entities should be applied from for each learning delivery – uses the learning delivery learning start date, or the transition date (set in parameters document) if the learning start date is before the transition date.

the learning delivery's applicable campus lookup factor date	
the learning delivery's learning start date	the learning delivery's learning start date >= the campus funding transition date
the campus funding transition date	**otherwise**

Finds the value of the specialist resources flag based on the value of all the Campus Funding entities on the applicable date.

the learning delivery's applicable campus specialist resource flag = ValueAt(the learning delivery's applicable campus lookup factor date, the learner's campus specialist resource flags)

Postcode Specialist Resource

the postcode specialist resource reference data's applicable effective to date	
the date 1 day after the postcode specialist resource reference data's effective to date	the postcode specialist resource reference data's effective to date is currently known and the postcode specialist resource reference data's effective to date is certain
Latest()	**otherwise**

the learning delivery's postcode specialist resource flags = TemporalFromRange(the learning delivery's postcode specialist resource reference data for delivery location postcode, the postcode specialist resource reference data's effective from date, the postcode specialist resource reference data's applicable effective to date, the postcode specialist resource reference data's specialist resources)

the learning delivery's applicable postcode specialist resource flag = ValueAt(the first day of the current funding year, the learning delivery's postcode specialist resource flags)

the postcode specialist resource reference data is a member of the learning delivery's postcode specialist resource reference data for delivery location postcode if

the postcode specialist resource reference data's postcode = the learning delivery's delivery location postcode

the first day of the current funding year is on or later than the postcode specialist resource reference data's effective from date and

the first day of the current funding year is on or earlier than the postcode specialist resource reference data's applicable effective to date

the postcode specialist resource reference data is a member of the learning delivery's postcode specialist resource reference data for applicable start date if

the first day of the current funding year is on or later than the postcode specialist resource reference data's effective from date and

the first day of the current funding year is on or earlier than the postcode specialist resource reference data's applicable effective to date

the learning delivery's count of postcode specialist resource reference data records stage 1 = the number of the learning delivery's postcode specialist resource reference data for applicable start date

the learning delivery's count of postcode specialist resource reference data records	
the learning delivery's count of postcode specialist resource reference data records stage 1	the learning delivery's count of postcode specialist resource reference data records stage 1 is currently known and the learning delivery's count of postcode specialist resource reference data records stage 1 is certain
0	**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**

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 2019 uplift matched of the learners home postcode from 2022/23 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 2022/23 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 2022/23 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**

Level 3 programme maths and English elements

the learner has English GCSE Grade D or below if

the learner's uppercase GCSE English qualification grade is currently known and
any
- the learner's uppercase GCSE English qualification grade = "D" or
- the learner's uppercase GCSE English qualification grade = "E" or
- the learner's uppercase GCSE English qualification grade = "F" or
- the learner's uppercase GCSE English qualification grade = "G" or
- the learner's uppercase GCSE English qualification grade = "U" or
- the learner's uppercase GCSE English qualification grade = "X" or
- the learner's uppercase GCSE Maths qualification grade = "NR" or
- the learner's uppercase GCSE English qualification grade = "NONE" or
- the learner's uppercase GCSE English qualification grade = "3" or
- the learner's uppercase GCSE English qualification grade = "2" or
- the learner's uppercase GCSE English qualification grade = "1"

and
either
- the learner's ECF FAM code is currently unknown or
- all
  - the learner's ECF FAM code is currently known and
  - the learner's ECF FAM code <> 2 and
  - the learner's ECF FAM code <> 3

the learner has Maths GCSE Grade D or below if

the learner's uppercase GCSE Maths qualification grade is currently known and
any
- the learner's uppercase GCSE Maths qualification grade = "D" or
- the learner's uppercase GCSE Maths qualification grade = "E" or
- the learner's uppercase GCSE Maths qualification grade = "F" or
- the learner's uppercase GCSE Maths qualification grade = "G" or
- the learner's uppercase GCSE Maths qualification grade = "U" or
- the learner's uppercase GCSE Maths qualification grade = "X" or
- the learner's uppercase GCSE Maths qualification grade = "NR" or
- the learner's uppercase GCSE Maths qualification grade = "NONE" or
- the learner's uppercase GCSE Maths qualification grade = "3" or
- the learner's uppercase GCSE Maths qualification grade = "2" or
- the learner's uppercase GCSE Maths qualification grade = "1"

and
either
- the learner's MCF FAM code is currently unknown or
- all
  - the learner's MCF FAM code is currently known and
  - the learner's MCF FAM code <> 2 and
  - the learner's MCF FAM code <> 3

the learner's number of A level learning delivery records current funding year stage 1 = InstanceCountIf(the learner's ESFA 16-19 learning deliveries, the learning delivery is an A level current funding year)

the learner's number of A level learning delivery records current funding year	
the learner's number of A level learning delivery records current funding year stage 1	the learner's number of A level learning delivery records current funding year stage 1 is currently known
0	**otherwise**

the learner's number of A level learning delivery records with SSA 2.1 stage 1 = InstanceCountIf(the learner's ESFA 16-19 learning deliveries, the learning delivery is an A level with sector subject area 2.1)

the learner's number of A level learning delivery records with SSA 2.1	
the learner's number of A level learning delivery records with SSA 2.1 stage 1	the learner's number of A level learning delivery records with SSA 2.1 stage 1 is currently known
0	**otherwise**

the learning delivery is a L3_Full_Time_1Yr if

the learning delivery's learning start date >= the first day of the current funding year and
the learning delivery's learning start date <= the last day of the current funding year and
the learning delivery's aim sequence number = the learner's latest core aim sequence number and
either
- all
  - the learner is studying an academic programme and
    the learning delivery is an A level and
    the learner's number of A level learning delivery records > 1 and
    either
    - the learning delivery's planned duration < 18 or
      all
      - the learning delivery's planned duration >= 18
        the learning delivery's completion status <> 1
- or
  all
  - the learner is not studying an academic programme and
    the learning delivery is NVQ_L3 and
    the learning delivery is GLH_Compliant
    either
    - the learning delivery's planned duration < 18 or
      all
      - the learning delivery's planned duration >= 18
        the learning delivery's completion status <> 1

the learning delivery is a L3_Full_Time_2Yr if

the learning delivery's learning start date >= the first day of the current funding year and
the learning delivery's learning start date <= the last day of the current funding year and
the learning delivery's planned duration >= 18 and
the learning delivery's completion status is currently known and
the learning delivery's completion status = 1
the learning delivery's aim sequence number = the learner's latest core aim sequence number and
either

all

the learner is studying an academic programme and
the learning delivery is an A level and
the learner's number of A level learning delivery records > 1

or
all

the learner is not studying an academic programme and
the learning delivery is NVQ_L3 and
the learning delivery is GLH_Compliant

the learning delivery is an A level

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 = "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"

the learning delivery is an A level current funding year

the learning delivery is an A level and
the learning delivery's learning start date >= the first day of the current funding year and
the learning delivery's learning start date <= the last day of the current funding year

the learning delivery is an A level with sector subject area 2.1

the learning delivery's sector subject area tier 2 = 2.1 and
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 = "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"

the learning delivery is NVQ_L3 if

the learning delivery's notional NVQ level is currently known and
the learning delivery's notional NVQ level = "3"

the learning delivery is GLH_Compliant if

the learning delivery's `guided learning hours` is currently known and
the learning delivery's guided learning hours >= 360

New L3_Maths_English_1year Elements

This is a count of the elements of level 3 maths and English that the learner is eligible for where a student on a Level 3 full time 1 year study programme, 1 if they have Grade D or below English and ECF is not 2 or 3, 1 if they have no Grade D or above Maths and ECF is not 2 or 3, 0 if they have neither.

the learner's new L3_Maths_English_1 year elements	
2	for at least one of the learner's learning deliveries the learning delivery is a L3_Full_Time_1Yr and the learner has English GCSE Grade D or below and the learner has Maths GCSE Grade D or below
1	for at least one of the learner's learning deliveries the learning delivery is a L3_Full_Time_1Yr and either the learner has English GCSE Grade D or below or the learner has Maths GCSE Grade D or below
0	**otherwise**

New L3_Maths_English_2year Elements

This is a count of the elements of level 3 maths and English that the learner is eligible for where a student on a Level 3 full time 2 year study programme, 1 if they have Grade D or below English and ECF is not 2 or 3, 1 if they have no Grade D or above Maths and ECF is not 2 or 3, 0 if they have neither.

the learner's new L3_Maths_English_2 year elements	
2	for at least one of the learner's learning deliveries the learning delivery is a L3_Full_Time_2Yr and the learner has English GCSE Grade D or below and the learner has Maths GCSE Grade D or below
1	for at least one of the learner's learning deliveries the learning delivery is a L3_Full_Time_2Yr and either the learner has English GCSE Grade D or below or the learner has Maths GCSE Grade D or below
0	Otherwise

Historic Level3ProgMathsandEnglishProportion

This is a lookup value based on the disadvantage funding (L3_Maths_English_1year and L3_Maths_English_2year) from the 2022/23 allocation passed into the calculation and used for the on programme funding element. This value is calculated as the total B L3_Maths_English_1year and L3_Maths_English_2year elements of your 2022/23 allocation as a proportion of the total programme funding (less Level3ProgMathsandEnglish and before area cost).

the provider's historic Level3ProgMathsandEnglish proportion	
the provider's Level3ProgMathsandEnglish proportion	the provider's Level3ProgMathsandEnglish proportion is currently known
0	**otherwise**

Parameters

Parameters

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

the first day of the current funding year = 2022-08-01

the last day of the current funding year = 2023-07-31

the last day of the previous funding year = 2022-07-31

the 1st June of the current funding year = 2023-06-01

the two year programme first year end date = 2023-06-30

the national rate for T Level band 9 students = £13,068

the learning hours threshold for T Level band 9 students = 1,730

the national rate for T Level band 8 students = £11,982

the learning hours threshold for T Level band 8 students = 1,580

the national rate for T Level band 7 students = £10,896

the learning hours threshold for T Level band 7 students = 1,380

the national rate for T Level band 6 students = £9,446

the learning hours threshold for T Level band 6 students = 1,180

the funded hours per FTE = 640

the national rate for full time students = £4,542

the learning hours threshold for full time students = 580

the national rate for part time band 4 students = £3,757

the learning hours threshold for part time band 4 students = 485

the national rate for part time band 3 students = £3,056

the learning hours threshold for part time band 3 students = 385

the national rate for part time band 2 students = £2,416

the learning hours threshold for part time band 2 students = 300

the national rate per FTE for part time band 1 students = £4,542

the learning hours threshold for part time band 1 students = 0

the campus funding transition date = 2018-08-01

the national PCW for ZTPR0001 = 1.3

the national PCW for ZTPR0002 = 1.0

the national PCW for ZTPR0003 = 1.3

the national PCW for ZTPR0004 = 1.1

the national PCW for ZTPR0005 = 1.4

the national PCW for ZTPR0006 = 1.1

the national PCW for ZTPR0007 = 1.2

the national PCW for ZTPR0008 = 1.4

the national PCW for ZTPR0009 = 1.2

the national PCW for ZTPR0010 = 1.1

the national PCW for ZTPR0011 = 1.0

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

either
  all
    the learner is a T level student and
    the learner is not a summer school student and
    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
    either
      the T level learner is not a year 3+ student or
      both
        the learner is in year 3 of T level study programme and
        the learner is repeating up to one full final year of T level
or
all
  the learner is not a T level student and
  the learner is not a summer school student and
  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

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	
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.

the learner's start date = the earliest of all the learning delivery's learning start date for the learner's ESFA 16-19 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.

the learner's planned end date = the latest of all the learning delivery's learning planned end date for the learner's ESFA 16-19 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).

the learner's actual end date = the latest of all the learning delivery's adjusted actual end date for the learner's ESFA 16-19 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**

Learning Delivery's Planned Duration

the learning delivery's planned duration = MonthDifference(the learning delivery's learning start date, the learning delivery's learning planned end date)

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**

ESFA 16-19 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 ESFA 16-19 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 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**

ESFA 16-19 Aim Selection

the learning delivery is a member of the learner's ESFA 16-19 learning deliveries if

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

T Levels

the learner's latest core aim is a T Level programme if

for at least one of the learner's core aims (the core aim)
the core aim's programme type is currently known and
the core aim's programme type is certain and
the core aim's programme type = 31 and
the core aim's learning start date = the learner's latest core aim start date

the learner is a T level student if

the learner's latest core aim is a T Level programme

the learner's latest programme is a T level if

the learner's latest core aim is a T Level programme

Latest ESFA 16-19 T level Programme Aim

There could be more than one ESFA 16-19 T level programme aim in a learner's dataset in one academic year, therefore a set of logic is applied to pick the latest T level aim in the set. This achieved in 4 steps.

Step 1 identifies the ESFA 16-19 T level programme aim(s) from all the learner's aims.

the learning delivery is an ESFA 16-19 T level programme aim if

the learning delivery's programme type is currently known and
the learning delivery's programme type = 31 and
the learning delivery's aim type = 1

the learning delivery is a member of the learner's ESFA 16-19 T level programme aims if

the learning delivery is a member of the learner's learning deliveries and
the learning delivery is an ESFA 16-19 T level programme aim

The Learner's Number of ESFA 16-19 T level Programme Aims

Step 2 calculates how many ESFA 16-19 T level programme aims are in the learner's dataset.

the learner's number of ESFA 16-19 T level programme aim records stage 1 = the number of the learner's ESFA 16-19 T level programme aims

the learner's number of ESFA 16-19 T level programme aim records	
the learner's number of ESFA 16-19 T level programme aim records stage 1	**the learner's number of ESFA 16-19 T level programme aim records stage 1 is currently known**
0	**Otherwise**

Learner's Latest ESFA 16-19 T level Programme Aim

Step 3 picks the latest ESFA 16-19 T level Programme aim from the learner's dataset using the ESFA 16-19 T level Programme aims start date.

the learner's latest ESFA 16-19 T level programme aim start date	
the learning delivery's learning start date which is the latest for all of the learner's ESFA 16-19 T level programme aims	the learner's number of ESFA 16-19 T level programme aim records > 0
uncertain	**Otherwise**

Latest ESFA 16-19 T level Programme Aim Sequence Number

Step 4 then extracts the aim sequence number for the latest ESFA 16-19 T level programme aim selected in step 3.

the learner's latest ESFA 16-19 T level programme aim sequence number	
the learning delivery's aim sequence number which is the greatest for all of the learner's ESFA 16-19 T level programme aims for which it is the case that the learning delivery's learning start date = the learner's latest ESFA 16-19 T level programme aim start date	the learner's number of ESFA 16-19 T level programme aim records > 0
0	**Otherwise**

the T level learner is a year 1 student if

the learner's latest ESFA 16-19 T level programme aim start date is on or later than the first day of the current funding year and

the learner's latest ESFA 16-19 T level programme aim start date is on or earlier than the last day of the current funding year and

the learner is a T level student

the T level learner is a year 2 student if

the learner's latest ESFA 16-19 T level programme aim start date is on or later than the date 1 year before the first day of the current funding year and

the learner's latest ESFA 16-19 T level programme aim start date is on or earlier than the date 1 year before the last day of the current funding year and

the learner is a T level student

the T level learner is a year 3+ student if

the learner's latest ESFA 16-19 T level programme aim start date is earlier than the date 1 year before the first day of the current funding year and

the learner is a T level student

Latest ESFA 16-19 T level Transition Programme Aim

There could be more than one ESFA 16-19 T level transition programme aim in a learner's dataset in one academic year, therefore a set of logic is applied to pick the latest T level transition programme aim in the set. This achieved in 4 steps.

Step 1 identifies the ESFA 16-19 T level transition programme aim(s) from all the learner's aims.

the learning delivery is an ESFA 16-19 T level transition programme aim if

the learning delivery's programme type is currently known and

the learning delivery's programme type = 30 and

the learning delivery's aim type = 1

the learning delivery is a member of the learner's ESFA 16-19 T level transition programme aims if

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

the learning delivery is an ESFA 16-19 T level transition programme aim

The Learner's Number of ESFA 16-19 T level Transition Programme Aims

Step 2 calculates how many ESFA 16-19 T level transition programme aims are in the learner's dataset.

the learner's number of ESFA 16-19 T level transition programme aim records stage 1 = the number of the learner's ESFA 16-19 T level transition programme aims

the learner's number of ESFA 16-19 T level transition programme aim records	
the learner's number of ESFA 16-19 T level transition programme aim records stage 1	**the learner's number of ESFA 16-19 T level transition programme aim records stage 1 is currently known**
0	**Otherwise**

Learner's Latest ESFA 16-19 T level Transition Programme Aim

Step 3 picks the latest ESFA 16-19 T level Transition Programme aim from the learner's dataset using the ESFA 16-19 T level Transition Programme aims start date.

the learner's latest ESFA 16-19 T level transition programme aim start date	
the learning delivery's learning start date which is the latest for all of the learner's ESFA 16-19 T level transition programme aims	the learner's number of ESFA 16-19 T level transition programme aim records > 0
uncertain	**Otherwise**

Latest ESFA 16-19 T level Transition Programme Aim Sequence Number

Step 4 then extracts the aim sequence number for the latest ESFA 16-19 T level transition programme aim selected in step 3.

the learner's latest ESFA 16-19 T level transition programme aim sequence number	
the learning delivery's aim sequence number which is the greatest for all of the learner's ESFA 16-19 T level transition programme aims for which it is the case that the learning delivery's learning start date = the learner's latest ESFA 16-19 T level transition programme aim start date	the learner's number of ESFA 16-19 T level transition programme aim records > 0
0	**Otherwise**

the learner is a transition student

for at least one of the learner's ESFA 16-19 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 = 30

the learner's latest programme is a Transition Programme if

for at least one of the learner's ESFA 16-19 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 = 30

the LARS programme funding's applicable effective to date	
the date 1 day after the LARS programme funding's effective to date	the LARS programme funding's effective to date is currently known and the LARS programme funding's effective to date is certain
Latest()	**otherwise**

the LARS programme funding's T level funding bands = TemporalFromRange(the LARS programme funding for the learning delivery, the LARS programme funding's effective from date, the LARS

programme funding's applicable effective to date, the LARS programme funding's T level funding band)

the learning delivery's applicable T level funding band = ValueAt(the first day of the current funding year, the LARS programme funding's T level funding bands)

the learner's T level funding band stage 1 = InstanceValueIf(the learner's ESFA 16-19 learning deliveries, the learning delivery's applicable T level funding band,the learning delivery's aim sequence number = the learner's latest ESFA 16-19 T level programme aim sequence number)

the learner's T level funding band	
the learner's T level funding band stage 1	the learner's T level funding band stage 1 is currently known and the learner's T level funding band stage 1 is certain and the learner's T level funding band stage 1 > 0
6	the learner is a T level student
0	**otherwise**

the LARS programme funding's T level PCWs = TemporalFromRange(the LARS programme funding for the learning delivery, the LARS programme funding's effective from date, the LARS programme funding's applicable effective to date, the LARS programme funding's T level PCW)

the learning delivery's applicable T level PCW = ValueAt(the first day of the current funding year, the LARS programme funding's T level PCWs)

the learner's T level PCW stage 1 = InstanceValueIf(the learner's ESFA 16-19 learning deliveries, the learning delivery's applicable T level PCW, the learning delivery's aim sequence number = the learner's latest ESFA 16-19 T level programme aim sequence number)

the learner's T level PCW	
the learner's T level PCW stage 1	the learner's T level PCW stage 1 is currently known and the learner's T level PCW stage 1 is certain and the learner's T level PCW stage 1 > 0
1	the learner is a T level student
0	**otherwise**

the learner's T level Additional Hours	
40	either all it is known whether the T level learner is a year 2 student and the T level learner is a year 2 student or all it is known whether the T level learner is a year 3+ student and the T level learner is a year 3+ student
0	**Otherwise**

the learner is repeating up to one full final year of T level if

the learner is a T level student and
either
both
the learner's NLM FAM code 1 is currently known and
the learner's NLM FAM code 1 = 22
or
both
the learner's NLM FAM code 2 is currently known and
the learner's NLM FAM code 2 = 22

the learner's national T level Tran Prog PCW	
1.75	the learner's latest programme is a Transition Programme and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = "ZTPR0001" and the learning delivery's count of postcode specialist resource reference data records > 0 and for at least one of the learning delivery's postcode specialist resource reference data for delivery location postcode the postcode specialist resource reference data's specialist resources = "Y"
1.75	the latest programme is a T level Transition Programme and the provider has specialist resources and for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = "ZTPR0001" and the learning delivery's count of postcode specialist resource reference data records = 0
the national PCW for ZTPR0001	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0001'
the national PCW for ZTPR0002	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0002'

the national PCW for ZTPR0003	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0003'
the national PCW for ZTPR0004	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0004'
the national PCW for ZTPR0005	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0005'
the national PCW for ZTPR0006	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0006'
the national PCW for ZTPR0007	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0007'

the national PCW for ZTPR0008	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0008'
the national PCW for ZTPR0009	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0009'
the national PCW for ZTPR0010	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0010'
the national PCW for ZTPR0011	the learner's latest programme is a T level Transition Programme for at least one of the learner's ESFA 16-19 learning deliveries the learning delivery's aim sequence number = the learner's latest core aim sequence number and the learning delivery's learning aim reference is currently known and the learning delivery's learning aim reference = 'ZTPR0011'
1	**Otherwise**

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	Low	1.1
1.2	Nursing and subjects and vocations allied to medicine	Low	1.1
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	1.4
4.2	Manufacturing technologies	High	1.4

[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	High	1.4
5	Construction, planning and the built environment	Medium	1.2
5.1	Architecture	Medium	1.2
5.2	Building and construction	High	1.4
5.3	Urban, rural and regional planning	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	1.3
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

SSA tier 2 code	SSA tier 2 description	Programme cost weighting banding	Programme cost weighting factor
10.2	Archaeology and archaeological sciences	Base	1
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

Programme cost weightings by T level Occupational Specialism

Occupational Specialism learning aim reference	Occupational Specialism Name	Occupational Specialism Programme Cost Weighting
ZTLOS032	T Level Occupational Specialism - Air conditioning engineering and refrigeration engineering	1.4
ZTLOS027	T Level Occupational Specialism - Electrical and electronic equipment engineering	1.3
ZTLOS026	T Level Occupational Specialism - Electrotechnical engineering	1.3
ZTLOS029	T Level Occupational Specialism - Gas engineering	1.3
ZTLOS030	T Level Occupational Specialism - Plumbing and heating engineering	1.3
ZTLOS028	T Level Occupational Specialism - Protection systems engineering	1.4
ZTLOS031	T Level Occupational Specialism - Heating engineering and ventilation	1.3
ZTLOS003	T Level Occupational Specialism - Building services design	1.3
ZTLOS002	T Level Occupational Specialism - Civil engineering	1.3
ZTLOS004	T Level Occupational Specialism - Hazardous materials analysis and surveying	1.3
ZTLOS001	T Level Occupational Specialism - Surveying and design for construction and the built environment	1.3
ZTLOS022	T Level Occupational Specialism - Bricklaying	1.3
ZTLOS023	T Level Occupational Specialism - Carpentry and joinery	1.3
ZTLOS024	T Level Occupational Specialism - Painting and decorating	1.3

ZTLOS025	T Level Occupational Specialism - Plastering	1.3
ZTLOS009	T Level Occupational Specialism - Data Technician	1.2
ZTLOS005	T Level Occupational Specialism - Digital Production, Design and Development	1.2
ZTLOS010	T Level Occupational Specialism - Digital Infrastructure	1.2
ZTLOS012	T Level Occupational Specialism - Digital Support	1.2
ZTLOS011	T Level Occupational Specialism - Network Cabling	1.4
ZTLOS007	T Level Occupational Specialism - Assisting teaching	1.2
ZTLOS006	T Level Occupational Specialism - Early years education and childcare	1
ZTLOS008	T Level Occupational Specialism - Supporting and mentoring students in further and higher education	1.2
ZTLOS013	T Level Occupational Specialism - Supporting Healthcare - Supporting the Adult Nursing team	1
ZTLOS014	T Level Occupational Specialism - Supporting Healthcare - Supporting the Midwifery Team	1
ZTLOS015	T Level Occupational Specialism - Supporting Healthcare - Supporting the Mental Health Team	1
ZTLOS016	T Level Occupational Specialism - Supporting Healthcare - Supporting the Care of Children and Young People	1
ZTLOS017	T Level Occupational Specialism - Supporting Healthcare - Supporting the Therapy Teams	1
ZTLOS018	T Level Occupational Specialism - Assisting with Healthcare Science	1
ZTLOS020	T Level Occupational Specialism - Technical - Food Sciences	1.3
ZTLOS019	T Level Occupational Specialism - Technical - Laboratory Sciences	1
ZTLOS021	T Level Occupational Specialism - Technical - Metrology Sciences	1.4

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

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