



Department
for Education

The adult skills fund funding calculation rulebase for 2025 to 2026

Version 1: June 2026

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Introduction and purpose of the document

1. This document is an annotated version of the adult skills fund funding calculation for the 2025 to 2026 funding year. The Individualised Learner Record (ILR) funding model "adult skills fund" (funding model code 38) includes:

- provision delivered through the Adult Skills Fund, including Free Courses for Jobs
- provision funded by devolved authorities. However they may choose to adjust the funding so their actual funding for a provider may be different to the values calculated from this calculation.

2. The funding policy implemented within this calculation is described in our [Funding Rates and Formula](#) document. The primary source of data for the calculation is the Individualised Learner Record which is described further here: [Individualised Learner Record \(ILR\) technical documents, guidance and requirements](#).

3. This document contains a copy of the source code which is compiled to form the actual funding calculation implemented within the [Submit learner data](#) (SLD) service and the associated Funding Information Service software.

4. The calculation is written using a rules management product called Oracle Policy Automation (OPA) which uses a natural-language approach to define the calculation rules. For more information about OPA see the Introduction to rulebases section below.

5. This document is aimed at software suppliers, people developing internal software, and others who wish to understand the exact details of the calculation.

6. This document contains:

- this introductory section
- the Introduction to Rulebases section which describes some specifics of the OPA product and how it works
- calculation logic originally implemented as text within Microsoft Word (starting at the Parameters section)
- calculation logic originally implemented as Microsoft Excel tables (starting at the Devolved Flexibility Mapping Table section)
- the Interface Fields section which describes Input data passed into the rulebase and resulting Output data from the rulebase

Understanding our terminology

7. The term 'we' or 'us' refers to the Department for Education (DfE). When this rulebase was originally created for August 2024, provision was funded by the Education and Skills Funding Agency (ESFA). There are references to ESFA which are part of the logic within this calculation.
8. When we refer to 'you' or 'providers', this includes colleges, higher education institutions, training organisations, local authorities and employers that receive funding from us to deliver education and training.

Changes from the funding model 35 calculation

9. The previous funding model (funding model 35) is still used for learners who started their learning aim before 1 August 2024. However all new starts for formula-funded provision from that date onwards should be using the new funding model 38.
10. Some older programmes which were funded using funding model 35 are no longer funded through funding model 38 or have ceased altogether, meaning that some elements of the funding model 35 calculation do not have equivalents in this calculation.

Introduction to rulebases

Background

11. We implement the funding calculation as a 'rulebase' using a rules management product called Oracle Policy Automation (OPA), which uses a natural-language approach to turn statements into computer logic.
12. We compile this document into the product to produce the calculations; there is no separate set of programming code to implement the logic.
13. The next section briefly explains about the rulebase, and how we construct it and view it. The formatting in the rulebase is important as some types of formatting represent a certain function or logic. We explain this fully in the next section.

What is a rule?

14. A **rule** is an assertion that you can draw a conclusion from a set of criteria. 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 bookshop
 - your plane can take-off from the airport if it has permission from the control tower and has completed a safety check
15. Rules operate on data and can incorporate operations such as comparisons and mathematical functions.

What is a rulebase?

16. A **rulebase** is simply a collection of one or more connected rules. For example:
 - Rule 1:
 - the person is eligible for a discount at the university bookshop 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 course and
 - the person does not have a full-time job

Conclusions and conditions

17. Each rule must have a **conclusion** (the set of criteria 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.

18. Here are some examples, each with a conclusion and one or two conditions:

Example 1:

- **CONCLUSION:** the ice-cream will melt **if**
 - **CONDITION:** the ice-cream has been left in the sun

Example 2:

- **CONCLUSION:** the person is eligible for discount at the university bookshop **if**
 - **CONDITION:** the person is a full-time student
 - **CONDITION:** the person is a pensioner

Example 3:

- **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?

19. 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

20. An attribute is a certain data type; either Boolean, or variable (text, number, currency, date, time of day, or date and time). Attributes form the building blocks of rules.

- boolean attributes can either have a true or false value
- variable attributes take a text, number, currency, date, time of day, or date and time value depending on the type of variable

21. 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)

Connecting conditions using and/or

22. 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.

23. Using the details in the table below:

- 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 you can only draw a negative outcome
- 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 false, then a negative outcome is drawn

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.

Grouping conditions using both/all and either/any

24. We use the **all** operator to group conditions separated by **and**.

25. In the example below, "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:

conclusion	A is true if
level 1	B is true
level 1	or
level 1	all
level 2	C is true
level 2	and
level 2	D is true

26. We use the **any** operator to group conditions separated by **or**.

27. In the example below, "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:

conclusion	A is true if
level 1	any
level 2	B is true
level 2	or
level 2	C is true
level 1	and
level 1	D is true

28. 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 you group only two conditions.

29. The grouping operators sit above the conditions they are grouping. The conditions 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:

conclusion	the claimant is eligible for a pension if
level 1	the claimant is poor
level 1	or
level 1	all
level 2	the claimant is sick and
level 2	the claimant has been sick for more than 6 months and
level 2	the claimant does not have another form of income

30. 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:

conclusion	the claimant is eligible for a pension if
level 1	the claimant is poor or
level 1	all
level 2	the claimant is sick and
level 2	the claimant has been sick for more than 6 months and
level 2	the claimant does not have another form of income
level 1	or
level 1	the claimant has been entitled to a pension previously

Alternative conclusions

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

32. 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. You do not need to state the alternative conclusion, it is assumed in all rules unless otherwise indicated.

Understand Oracle Policy Modelling format and structure

33. Oracle Policy Modelling format is strict to maintain consistency and completeness of rules and to avoid logical ambiguity. Styles and indentation play an important role in recognizing the meaning of rules.

34. Indentation and styles 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.

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

36. The rule below shows an example of how you format a rule in Word using Oracle Policy Modelling document styles:

conclusion	the claimant is eligible for living allowances if
level 1	the claimant is living alone and
level 1	the claimant satisfies the age criteria
level 2	the claimant satisfies the male age criteria
level 3	the claimant is aged over 65 and
level 3	the claimant is a man
level 2	or
level 2	the claimant satisfies the female age criteria
level 3	the claimant is aged over 63 and
level 3	the claimant is a woman

Rule tables in Word documents

37. 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 you reach a conclusion. The following diagram shows how a rule table is structured:

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

38. The first row of the table defines which variable or statement you use as the conclusion attribute for the rule.

39. 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.

40. The final row provides an alternative conclusion, to which the conclusion will be set if all of the conditions equate to false. Using an example below, the table means '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':

B	
C	A
E	D
F	otherwise

41. Rule tables operate from top to bottom, with an implicit 'otherwise' between each row. 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

42. 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 to be either true or false.

43. The truth tables below 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

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

- the **uncertain** operator causes the condition to return true only if its value is uncertain. A condition using the uncertain operator returns false if the underlying value is not uncertain
- the **known** operator is commonly used in procedural rules that drive an investigation. For example, forcing attributes to be known in a particular order before determining a goal
- the **currently known** operator is used to test whether an attribute is known, without causing it to be brought up in the question search and asked of the user, i.e. it will test the *current* state of the attribute. It is used a lot where the rule base runs off data (rather than an interactive interview) where the data may or may not be provided, and the fact that a piece of data has not been provided has meaning (e.g. if the 'eligibility for entitlement funding' is simply not returned in the ILR then we can infer that the learner is not eligible for entitlement)
- the **unknown** operator is most commonly used for defaulting values in the rulebase where the user has the option of providing an overriding value (either directly or through an inferred attribute)

45. The table below shows how this works:

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

Operator	Example
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 is unknown
currently known	income details are available if the applicant's income is currently known

How are comments shown?

46. Some explanatory comments are added within the rules. These are not part of the rules but may give background information or context. They are shown in the following format:

[Comments are shown in this format.](#)

[They are usually shown above the rule or set of rules which the comment relates to.](#)

47. This is the end of the explanation for how we create rulebases. The following sections contain the details within the adult skills rulebase.

Parameters

48. This section contains some parameters used by the calculation. They are grouped together in this section rather than 'hard-coding' values such as the current funding year start date, to make for easier maintenance of the rulebase in future.

This calculation applies from this date. If a learning aim has a learning start date or original start date which is before the date below, the calculation should always calculate zero funding.

the funding method transition date = 2024-08-01

This percentage of an aim's value is held back to be paid on completion or achievement (according to which method applies to that learning aim).

the default achievement or completion percentage = 20%

Where we calculate job outcome earnings, this percentage of the aim's value is the default job outcome earnings.

the default job outcome percentage = 10%

Where a learning aim is not fully funded, this shows what percentage of the unweighted aim rate is assumed to come from elsewhere, that is, the assumed amount which does not come from government funding.

the national non-government percentage = 50%

The current funding year is passed into the rulebase as an input, in the format nnmm (for instance 2425 for the funding year 2024 to 2025. These statements convert that input into two dates.

the current funding year start date = MakeDate(Number(Substring(the current funding year,0,2))+2000, 08,01)

the current funding year end date = MakeDate(Number(Substring(the current funding year,2,2))+2000, 07, 31)

Where there is not a matching postcode to give an area cost or disadvantage uplift, these default values are used instead.

the default area uplift = 1

the default disadvantage uplift = 1

The Free Courses for Jobs policy started (under a different name) in April 2021.

There are 2 possible uplift values for a given learning aim; there is logic elsewhere to use LARS Category codes to determine which one uplift value to use

the free courses for jobs offer policy start date = 2021-04-01

the free courses for jobs uplift rate 1 = £600

the free courses for jobs uplift rate 2 = £150

This is to allow extra funding for ESOL qualifications where providers use the ILR Additional Delivery Hours field to record that they have delivered additional hours for that learner. In 2024-25, instead of using a matrix rate lookup, we will pay a value of £6 per hour. Devolved authorities can specify a different rate which is held elsewhere in the rulebase.

the ESFA ESOL rate per additional hour = £6

This is the ratio between the Specialist and High rates for non-devolved Adult Skills. This is applied as an uplift where Land-based qualifications are delivered by certain providers. Devolved authorities can use LARS to specify a different ratio.

the default ESFA specialist resource uplift = 2.0/1.6

Version

49. This small section defines the current rulebase version.

the current version of the rulebase = "2526.02.02"

Categorisations

50. This section includes categorisations and other calculations which are not directly calculating funding. In many cases they are simple translations of ILR values and other input data such as reference data, into attributes to be used in other rules.

Upper Case Conversions

The ILR data is case insensitive, but OPA is case sensitive, so the FAM type is converted to upper-case here so that, for example, "LSF" can be used in the rulebase without worrying about the case of the original ILR data.

Note that "ToUpper" is not a native function in OPA, and is an external custom function which has been written for use with OPA.

the learning delivery FAM's upper case type = ToUpper(the learning delivery FAM's type)

the organisation funding's upper case funding factor = ToUpper(the organisation funding's funding factor)

Funding and Monitoring Codes

The learning delivery's FAM code in the ILR is a text field, but all the values we want to use are numeric. Converting these to a number means some comparisons don't need to worry about leading zeroes. Note there is also an upper case conversion in the previous section which applies to FAM types.

the learning delivery FAM's numeric code = Number(the learning delivery FAM's code)

Each learning delivery should have one SOF code, so this should always return one value.

the learning delivery's numeric source of funding code = InstanceValueIf(the learning delivery's FAMs, the learning delivery FAM's numeric code, the learning delivery FAM's upper case type = "SOF")

Residential aims may get a long term residential college uplift if the provider is also an LTRC provider. This policy did not continue for ESFA-funded new starts in 2024/25, but may be adopted by one or more of the devolved authorities.

the learning delivery is residential if

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "LDM" and

the learning delivery FAM's code = "322"

The procurement status is used in funding line types

the learning delivery is funded from the ESFA AEB 2023 procurement	
true	<p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = "LDM" and</p> <p>the learning delivery FAM's numeric code = 388</p>
false	otherwise

the learning delivery is funded from an ESFA procured budget if

the learning delivery is funded from the ESFA AEB 2023 procurement

For devolved provision which is procured, the ILR data should contain DAM=002, but use the numeric version in case there are differences in leading zeroes.

the learning delivery is funded from a procured budget if

the learning delivery is funded from the ESFA AEB 2023 procurement or
all

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "DAM" and

the learning delivery FAM's numeric code = 2

The 20% of funding for achievement or completion does not have funding adjustment for prior learning applied if the learning delivery is a restart.

the learning delivery is a restart if

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "RES" and

the learning delivery FAM's numeric code = 1

Determine whether the aim is fully funded or co-funded.

the learning delivery is fully funded	
true	<p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = "FFI" and</p> <p>the learning delivery FAM's numeric code = 1</p>
false	otherwise

Free courses for jobs

This part of the eligibility comes from the LDM 378 code

the learning delivery is eligible for free courses for jobs stage 1 if

the learning delivery's adjusted start date is on or later than the free courses for jobs offer policy start date and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "LDM" and

the learning delivery FAM's code = "378"

the learning delivery is eligible for free courses for jobs if

it is certain whether or not the learning delivery is eligible for free courses for jobs stage 1 and

the learning delivery is eligible for free courses for jobs stage 1

The FCFJ rate uplifts come from LARS Category codes 45 and 46. These are assigned to qualifications on the national FCFJ list.

Note that devolved authorities have the flexibility to specify additional learning aims which are not on the national list. However these will not attract the uplifts and will not have Category 45 or 46 in LARS.

Also note that this logic looks at the Category reference "as at" the adjusted start date, using the effective from and to dates from the category data.

the learning delivery LARS category is NSF level 3 free courses for jobs rate 1 if

for at least one of the learning delivery's LARS categories (the category)

the category's category reference = 45 and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown

or

all

the category's effective to date is currently known and

the category's effective to date is certain and

the category's effective to date is on or later than the learning delivery's adjusted start date

the learning delivery LARS category is NSF level 3 free courses for jobs rate 2 if

for at least one of the learning delivery's LARS categories (the category)

the category's category reference = 46 and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown

or

all

the category's effective to date is currently known and

the category's effective to date is certain and

the category's effective to date is on or later than the learning delivery's adjusted start date

Aims where uplifts are not applied

For certain aims within an HGV driver training programme, the provider may recoup standard funding values; for instance the cost of a 3B driving test. The funding rates for these aims are fixed and we do not wish to uplift them with area cost or disadvantage factors. After initially applying this to HGV aims, we extended this functionality to apply more generally to other learning aims with category 60 or 61 in LARS.

the learning delivery LARS category is an HGV class code

For at least one of the learning delivery's LARS categories (the category)

either

the category's category reference = 51 or
the category's category reference = 52 or
the category's category reference = 53

and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown
or
all

the category's effective to date is currently known and
the category's effective to date is certain and
the category's effective to date is on or later than the learning delivery's adjusted start date

the learning delivery LARS category is one where area cost and disadvantage are not applied if

For at least one of the learning delivery's LARS categories (the category)

either

the category's category reference = 60 or

the category's category reference = 61

and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown

or

all

the category's effective to date is currently known and

the category's effective to date is certain and

the category's effective to date is on or later than the learning delivery's adjusted start date

Organisational Reference Data and Specialist Resources

The specific lookups against the organisation funding data happen elsewhere, but this attribute and the next one should bring a count of those records. The rulebase integration should only pass records into the rulebase which have the same UKPRN, but due to changes over time there can still be multiple records.

the learning delivery's count of organisation funding reference records stage 1 = the number of the organisation funding reference data

the learning delivery's count of organisation funding reference records	
the learning delivery's count of organisation funding reference records stage 1	<p>the learning delivery's count of organisation funding reference records stage 1 is currently known and</p> <p>the learning delivery's count of organisation funding reference records stage 1 is certain</p>
0	otherwise

For specialist resources the eligibility can be held at postcode level, usually following a provider merger or other type of restructure. This attribute and the next one count the specialist resources postcode records passed into the rulebase for this UKPRN. Note that all postcode records for that UKPRN are passed into the calculation; there is no matching against delivery location postcode in the integration process.

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

the learning delivery's count of provider postcode specialist resource records	
the learning delivery's count of provider postcode specialist resource records stage 1	<p>the learning delivery's count of provider postcode specialist resource records stage 1 is currently known and</p> <p>the learning delivery's count of provider postcode specialist resource records stage 1 is certain</p>
0	otherwise

Area and Disadvantage Uplifts

This section determines the applicable area cost and disadvantage factors.

The area cost factor and disadvantage uplift default to 1 if there is no factor found from matching to postcode data.

This attribute is required in order to use the "TemporalFromRange" function in the next attribute. This function requires both start and end dates (as opposed to TemporalFromStartDate which uses a sequence of Start dates). So this creates the end/effective to dates where they are not present in the source data.

the learning delivery postcode area cost factor's effective to date stage 1	
the date 1 day after the learning delivery postcode area cost factor's effective to date	the learning delivery postcode area cost factor's effective to date is currently known and the learning delivery postcode area cost factor's effective to date is certain
2099-01-01	otherwise

This creates a temporal variable from the multiple area cost factors. Note that the "integration layer" should only be passing in area cost data which matches the learning aim's delivery location postcode.

the learning delivery's area cost factor stage 1 = TemporalFromRange(the learning delivery's postcode area cost factors, the learning delivery postcode area cost factor's effective from date, the learning delivery postcode area cost factor's effective to date stage 1, the learning delivery postcode area cost factor's area cost factor)

Select a value from the temporal range attribute above, as at the applicable lookup factor date.

the learning delivery's area cost factor = ValueAt(the learning delivery's applicable lookup factor date, the learning delivery's area cost factor stage 1)

In some cases we want to apply a fixed rate which does not include area cost or disadvantage factors for a learning aim. This calculation applies the default area uplift (1.0) in this case, and also ensures the adjusted area cost factor has the default value if the postcode matching did not identify a factor.

the learning delivery's adjusted area cost factor	
the default area uplift	the learning delivery should use the exceptional calc method for area cost and disadvantage
the default area uplift	the learning delivery's area cost factor is uncertain or the learning delivery's area cost factor is unknown
the learning delivery's area cost factor	the learning delivery's area cost factor > 1
the default area uplift	otherwise

This attribute is required in order to use the "TemporalFromRange" function in the next attribute. This function requires both start and end dates (as opposed to TemporalFromStartDate which uses a sequence of Start dates). So this creates the end/effective to dates where they are not present in the source data.

the learner postcode disadvantage factor's effective to date stage 1	
the date 1 day after the learner postcode disadvantage factor's effective to date	the learner postcode disadvantage factor's effective to date is currently known and the learner postcode disadvantage factor's effective to date is certain
2099-01-01	otherwise

The disadvantage uplift data has an extra source of funding (SOF) attribute. One postcode can have multiple different disadvantage uplifts at the same time, for different sources of funding. For devolved provision, there may be a different disadvantage factor associated with that SOF.

Also the data has effective from and to dates. Note that the "integration layer" should only be passing in disadvantage data which matches the learner's postcode prior to enrolment.

These next 2 attributes create 2 temporal variables of postcode data; one uses SOF 105 (Adult skills funded; non-devolved) and the other matches the ILR SOF value for that learning aim. In later steps the calculation chooses which one to use.

The 2 relationships "the learning delivery's matching SOF disadvantage reference data" and "the learning delivery's SOF 105 disadvantage reference data" are defined in the Relationships section.

the learning delivery's matching SOF postcode disadvantage uplift temporal =
TemporalFromRange(the learning delivery's matching SOF disadvantage
reference data, the learner postcode disadvantage factor's effective from, the
learner postcode disadvantage factor's effective to date stage 1, the learner
postcode disadvantage factor's disadvantage factor)

the learning delivery's SOF 105 postcode disadvantage uplift temporal =
TemporalFromRange(the learning delivery's SOF 105 disadvantage reference
data, the learner postcode disadvantage factor's effective from, the learner
postcode disadvantage factor's effective to date stage 1, the learner postcode
disadvantage factor's disadvantage factor)

Using the 2 temporal attributes defined above, these 2 attributes determine two factors as at the applicable lookup factor date; one is the SOF 105 value, and the other is the value (if any) which matches the ILR SOF of the learning aim.

the learning delivery's matching SOF disadvantage uplift = ValueAt(the learning
delivery's applicable lookup factor date, the learning delivery's matching SOF
postcode disadvantage uplift temporal)

the learning delivery's SOF 105 disadvantage uplift= ValueAt(the learning
delivery's applicable lookup factor date, the learning delivery's SOF 105
postcode disadvantage uplift temporal)

This step determines which disadvantage uplift to apply. In some cases we want to apply a fixed rate which does not include area cost or disadvantage factors for a learning aim. This calculation applies the default uplift (1.0) in this case.

If the learning aim is devolved and there is a matching disadvantage factor for that source of funding, this can be applied, but another exception is free courses for jobs where the non-devolved (SOF 105) disadvantage uplifts are used even for devolved provision.

The default factor (1.0) is used if the earlier steps do not identify a factor.

the learning delivery's adjusted disadvantage uplift	
the default disadvantage uplift	the learning delivery should use the exceptional calc method for area cost and disadvantage
the learning delivery's matching SOF disadvantage uplift	<p>the learning delivery's matching SOF disadvantage uplift is currently known and</p> <p>the learning delivery's matching SOF disadvantage uplift is certain and</p> <p>the learning delivery's matching SOF disadvantage uplift > 0 and</p> <p>the learning delivery's funding model = 38 and</p> <p>the learning delivery is not eligible for free courses for jobs</p>
the learning delivery's SOF 105 disadvantage uplift	<p>the learning delivery's SOF 105 disadvantage uplift is currently known and</p> <p>the learning delivery's SOF 105 disadvantage uplift is certain and</p> <p>the learning delivery's SOF 105 disadvantage uplift > 0</p>
the default disadvantage uplift	otherwise

This table mirrors the one above and contains the same logic to choose each row. The intention is to output further information on how the factor was chosen above. In particular this attribute shows the SOF which was used to determine the disadvantage factor; either SOF 105 or the SOF of the devolved authority funding the aim (or "None" if neither was used).

the learning delivery's disadvantage uplift applicable SOF	
"None"	the learning delivery should use the exceptional calc method for area cost and disadvantage
Text(the learning delivery's numeric source of funding code)	<p>the learning delivery's matching SOF disadvantage uplift is currently known and</p> <p>the learning delivery's matching SOF disadvantage uplift is certain and</p> <p>the learning delivery's matching SOF disadvantage uplift > 0 and</p> <p>the learning delivery's funding model = 38 and</p> <p>the learning delivery is not eligible for free courses for jobs</p>
"105"	<p>the learning delivery's SOF 105 disadvantage uplift is currently known and</p> <p>the learning delivery's SOF 105 disadvantage uplift is certain and</p> <p>the learning delivery's SOF 105 disadvantage uplift > 0</p>
"None"	otherwise

This exceptional calc method stops uplifts applying for area cost and disadvantage; the effect is the learning aim always generates the same rate. The original scenario where this was created was for certain elements of HGV programmes where we wanted to reimburse a specific value. However since then we have added two generic category codes which devolved authorities can use or we can use.

the learning delivery should use the exceptional calc method for area cost and disadvantage if

either

all

it is known whether or not the learning delivery LARS category is an HGV class code and

it is certain whether or not the learning delivery LARS category is an HGV class code and

the learning delivery LARS category is an HGV class code

or

all

it is known whether or not the learning delivery LARS category is one where area cost and disadvantage are not applied

it is certain whether or not the learning delivery LARS category is one where area cost and disadvantage are not applied

the learning delivery LARS category is one where area cost and disadvantage are not applied

When to calculate using achievement and when to use completion

For the 2024/25 funding year, the ESFA changed the funding method. Previously we would hold back 20% of an aim's value to be paid when the learner achieves their learning aim.

From 2024/25, for non-devolved provision which is grant-funded, 20% is held back but it is paid when the learning aim is completed rather than being achieved. For non-devolved procured provision, the 20% is still based on achievement.

For devolved provision, we asked devolved authorities to choose which method to apply; for 2024/25 some retained the previous method of paying the final 20% on achievement, but some chose to use completion in the same way as the ESFA. Since then we have continued to offer devolved authorities this flexibility.

The logic in this section determines which method to use.

The first attribute in this section covers an exceptional case when we use neither completion nor achievement.

When we introduced AEB work placement aims (in 2023/24) we introduced similar logic because it didn't make sense to measure achievement of a work placement.

We have kept this logic in this FM38 rulebase. Although some learning aims' funding now use completion instead of achievement, this is not universal so it was simpler to keep this method.

However for FM38 we have also changed the calculation to apply this to learning aims where we are not applying the area cost and disadvantage factors, as generally these are short learning aims where we always want to calculate the same rate.

This is also one of three possible Boolean attributes to show whether the calculation should use Achievement, Completion, or neither. These should be mutually exclusive, so that only one of the three should be true.

the learning delivery should use the exceptional calc method with zero percentage for achievement or completion if

the learning delivery is an AEB work placement aim or
the learning delivery should use the exceptional calc method for area cost and disadvantage

This attribute is set if the calculation should be using an achievement percentage. The first exception is the attribute above to use the exceptional calc. The second rule is derived from the spreadsheet table which shows how each devolved authority wants to fund based on completion or achievement.

the learning delivery's calculation should use an achievement percentage	
false	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
true	the learning delivery's devolved completion or achievement policy is currently known and the learning delivery's devolved completion or achievement policy is certain and the learning delivery's devolved completion or achievement policy = "Achievement"
true	the learning delivery is funded from an ESFA procured budget and the learning delivery's funding organisation code="ESFA"
false	otherwise

This attribute is set if the calculation should be using a completion percentage. The first exception is the attribute above to use the exceptional calc. The second rule is derived from the spreadsheet table which shows how each devolved authority wants to fund based on completion or achievement. The third rule in this and the previous table is intended to apply to non-devolved provision, and the check for funding organisation =ESFA is required to stop it applying to devolved provision.

the learning delivery's calculation should use a completion percentage	
false	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
true	the learning delivery's devolved completion or achievement policy is currently known and the learning delivery's devolved completion or achievement policy is certain and the learning delivery's devolved completion or achievement policy = "Completion"
true	the learning delivery is not funded from an ESFA procured budget and the learning delivery's funding organisation code="ESFA"
false	otherwise

Devolved Funding

This attribute converts the ILR Source of Funding (SOF) into an alphabetic code, for inclusion in reports .

the learning delivery's funding organisation code	
"ESFA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "105"
"GMCA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "110"
"LCRCA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "111"
"WMCA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "112"
"WECA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "113"
"TVCA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "114"
"CPCA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "115"
"London"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "116"
"NEMCA"	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and the learning delivery FAM's code = "117"

“SYMCA”	<p>for at least one of the learning delivery’s FAMs</p> <p>the learning delivery FAM’s upper case type = “SOF” and</p> <p>the learning delivery FAM’s code = “118”</p>
“WYCA”	<p>for at least one of the learning delivery’s FAMs</p> <p>the learning delivery FAM’s upper case type = “SOF” and</p> <p>the learning delivery FAM’s code = “119”</p>
“NEMCA”	<p>for at least one of the learning delivery’s FAMs</p> <p>the learning delivery FAM’s upper case type = “SOF” and</p> <p>the learning delivery FAM’s code = “120”</p>
“EMCCA”	<p>for at least one of the learning delivery’s FAMs</p> <p>the learning delivery FAM’s upper case type = “SOF” and</p> <p>the learning delivery FAM’s code = “121”</p>
“YNYCA”	<p>for at least one of the learning delivery’s FAMs</p> <p>the learning delivery FAM’s upper case type = “SOF” and</p> <p>the learning delivery FAM’s code = “122”</p>
“Cornwall”	<p>for at least one of the learning delivery’s FAMs</p> <p>the learning delivery FAM’s upper case type = “SOF” and</p> <p>the learning delivery FAM’s code = “123”</p>
“None”	Otherwise

Funding Line Type

The funding line type is used to aggregate the funding into various different categories which identify which budget or funding line each learning delivery record should be funded from.

These are based on the learner's age, whether the provision is procured, whether the provision is devolved, etc,

For devolved provision we use both definitions of age 19 (age on 31 August or age at start) although this is ultimately governed by ILR validation rules.

As this FM38 calculation is for new starts from 1 August 2024, some of the funding line types in the predecessor FM35 calculation (such as those for Apprenticeships) are no longer required.

In the 2024/25 version of this calculation and in FM35, if a learner was aged 19-23 and was studying a free courses for jobs learning aim then they were given funding line type of ASF Core (previously AEB). For the 2025/26 calculation, for DfE- (previously ESFA-) funded learning aims, we have changed this so these learners are always given one of the funding line types of free courses for jobs. For devolved provision, we offered the devolved authorities the choice whether or not to change this in the same way as the DfE. Their choices are indicated in the "Devolved Flexibility Map" document in the "FCFJ Funding Line Type" tab

the learning delivery's funding line type	
"None"	the learning delivery's adjusted start date < the funding method transition date
"ESFA Adult Skills Fund free courses for jobs (non-procured)"	the learning delivery's funding organisation code = "ESFA" and the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not funded from a procured budget and the learning delivery's funding model = 38 and the learning delivery is eligible for free courses for jobs <i>the learning delivery's age at start >= 24</i>

<p>“ESFA Adult Skills Fund free courses for jobs (procured from Aug 2023)”</p>	<p>the learning delivery’s funding organisation code = “ESFA” and the learner’s age at 31st August of the current funding year ≥ 19 and the learning delivery is funded from the ESFA AEB 2023 procurement and the learning delivery’s funding model = 38 and the learning delivery is eligible for free courses for jobs</p> <p><i>the learning delivery’s age at start ≥ 24</i></p>
<p>“ESFA Adult Skills Fund core (non-procured)”</p>	<p>the learning delivery’s funding organisation code = “ESFA” and the learner’s age at 31st August of the current funding year ≥ 19 and the learning delivery is not funded from a procured budget the learning delivery’s funding model = 38</p>
<p>“ESFA Adult Skills Fund core (procured from Aug 2023)”</p>	<p>the learning delivery’s funding organisation code = “ESFA” and the learner’s age at 31st August of the current funding year ≥ 19 and the learning delivery is funded from the ESFA AEB 2023 procurement and the learning delivery’s funding model = 38</p>
<p>“DA/GLA Adult Skills Fund free courses for jobs (non-procured)”</p>	<p>the learning delivery’s funding organisation code $\neq$ “ESFA” and the learning delivery’s funding organisation code $\neq$ “None” and either</p> <p>the learner’s age at 31st August of the current funding year ≥ 19 or the learning delivery’s age at start ≥ 19</p> <p>and</p> <p>the learning delivery is not funded from a procured budget and the learning delivery’s funding model = 38 and the learning delivery is eligible for free courses for jobs and</p> <p>either</p> <p>the learning delivery’s devolved FCFJ 19 to 23 funding line type policy = “FCFJ” or the learning delivery’s age at start ≥ 24</p>

<p>“DA/GLA Adult Skills Fund free courses for jobs (procured)”</p>	<p>the learning delivery’s funding organisation code <> “ESFA” and the learning delivery’s funding organisation code <> “None” and either the learner's age at 31st August of the current funding year >= 19 or the learning delivery's age at start >= 19 and the learning delivery is funded from a procured budget and the learning delivery’s funding model = 38 and the learning delivery is eligible for free courses for jobs and either the learning delivery's devolved FCFJ 19 to 23 funding line type policy = “FCFJ” or the learning delivery's age at start >= 24</p>
<p>“DA/GLA Adult Skills Fund core (non-procured)”</p>	<p>the learning delivery’s funding organisation code <> “ESFA” and the learning delivery’s funding organisation code <> “None” and either the learner's age at 31st August of the current funding year >= 19 or the learning delivery's age at start >= 19 and the learning delivery is not funded from a procured budget and the learning delivery’s funding model = 38</p>
<p>“DA/GLA Adult Skills Fund core (procured)”</p>	<p>the learning delivery’s funding organisation code <> “ESFA” and the learning delivery’s funding organisation code <> “None” and either the learner's age at 31st August of the current funding year >= 19 or the learning delivery's age at start >= 19 and the learning delivery is funded from a procured budget and the learning delivery’s funding model = 38</p>

“Short term funding initiative 1”	<p>the learner's age at 31st August of the current funding year ≥ 19 and</p> <p>the learning delivery's funding model = 81 and</p> <p>the learning delivery's funding organisation code = “ESFA” and</p> <p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = “LDM” and</p> <p>the learning delivery FAM's code = “370”</p>
“Short term funding initiative 2”	<p>the learner's age at 31st August of the current funding year ≥ 19 and</p> <p>the learning delivery's funding model = 81 and</p> <p>the learning delivery's funding organisation code = “ESFA” and</p> <p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = “LDM” and</p> <p>the learning delivery FAM's code = “371”</p>
“Short term funding initiative 3”	<p>the learner's age at 31st August of the current funding year ≥ 19 and</p> <p>the learning delivery's funding model = 81 and</p> <p>the learning delivery's funding organisation code = “ESFA” and</p> <p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = “LDM” and</p> <p>the learning delivery FAM's code = “372”</p>
“Short term funding initiative 4”	<p>the learner's age at 31st August of the current funding year ≥ 19 and</p> <p>the learning delivery's funding model = 81 and</p> <p>the learning delivery's funding organisation code = “ESFA” and</p> <p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = “LDM” and</p> <p>the learning delivery FAM's code = “373”</p>
“None”	otherwise

Employment Status Job Outcomes

In the 2024/25 ILR, the old Employment Outcome field (on the learning delivery entity) has been replaced by the Employment Status Monitoring type/code combination of OET=4.

This is now held on the Learner Employment Status entity, which means there is further logic to link this to relevant Learning Delivery entity/entities

This attribute looks for the OET4 code amongst the 3 OET values passed into the calculation. These are de-normalised into three OET code attributes when the data is passed into the calculation.

the learner employment status represents a job outcome if

any

all

the learner employment status's OET code 1 is currently known and
the learner employment status's OET code 1 is certain and
the learner employment status's OET code 1 = 4

or

all

the learner employment status's OET code 2 is currently known and
the learner employment status's OET code 2 is certain and
the learner employment status's OET code 2 = 4

or

all

the learner employment status's OET code 3 is currently known and
the learner employment status's OET code 3 is certain and
the learner employment status's OET code 3 = 4

Work Placement Aims

Following the integration of Traineeships into the adult education budget in 2023, we made changes to the calculation to support stand-alone work placement aims. In particular we did not hold back 20% of the aim value for achievement, as a work placement isn't something that naturally has a concept of Achievement. This approach has been carried forward into 2024/25 even though sometimes the final 20% is linked to completion rather than achievement.

This attribute uses the learning aim's LARS category to identify work placement aims.

the learning delivery is an AEB work placement aim if

For at least one of the learning delivery's LARS categories (the category)

any

the category's category reference = 66 or

the category's category reference = 74

and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown

or

all

the category's effective to date is currently known and

the category's effective to date is certain and

the category's effective to date is on or later than the learning delivery's adjusted start date

ESOL Learning Aims

This section uses the LARS Basic Skills Type to determine if a learning aim is classed as an ESOL aim.

This attribute takes the LARS annual values data (which has set of values over time) and converts it into a Temporal variable. Note that the data passed into the rulebase is already filtered to the aim's ILR learning aim reference.

the learning delivery's basic skills type stage 1 = TemporalFromStartDate(the learning delivery's LARS annual values, the learning delivery LARS annual value's effective from date, the learning delivery LARS annual value's basic skills type)

This step takes the temporal attribute above, and sets the value to zero in date ranges where the stage 1 value above is uncertain, or if there are no basic skills values at any point for the learning aim.

the learning delivery's basic skills type	
the learning delivery's basic skills type stage 1	the learning delivery's basic skills type stage 1 is currently known and the learning delivery's basic skills type stage 1 is certain
0	otherwise

Using the temporal value above, select the value of the LARS Basic Skills type as at the adjusted start date of the learning aim.

the learning delivery's applicable basic skills type = ValueAt(the learning delivery's adjusted start date, the learning delivery's basic skills type)

Using the applicable basic skills type attribute, determine whether to class the learning delivery as ESOL.

the learning delivery is an ESOL aim if

the learning delivery's applicable basic skills type is currently known and
the learning delivery's applicable basic skills type is certain and
any

the learning delivery's applicable basic skills type = 36 or
the learning delivery's applicable basic skills type = 37 or
the learning delivery's applicable basic skills type = 38 or
the learning delivery's applicable basic skills type = 39 or
the learning delivery's applicable basic skills type = 40 or
the learning delivery's applicable basic skills type = 41 or
the learning delivery's applicable basic skills type = 42

Date Rules

51. This section contains attributes which are derived from dates, which apply conversion to dates, or other time-based attributes not directly calculating funding.

Global Date Rules

This is a time-based attribute which is set to True on the last day of every period. This is used when totalling up uncapped funding. (Although from 2024/25 the ESFA stopped applying a funding cap based on total funding for a learner in a year, it was still an option available for devolved authorities for 2025/26.)

the date is the last day of the period if

TemporalOncePerMonth(the current funding year start date, the date 1 days after the current funding year end date, 31)

This is a time-based attribute which is set to True on every day in the current funding year. This is used when setting the time-based cash outputs to ensure that funding is only generated in the current funding year. However, we have not used it in the calc yet and we may not need this anymore.

<i>the date is in the current funding year</i>	
<i>true</i>	<i>TemporalOnOrAfter(the current funding year start date) and TemporalOnOrBefore(the current funding year end date)</i>
<i>false</i>	otherwise

Funding and Monitoring From and To Dates

If the Learning Delivery FAM's 'from' date is 10 August 2013, this attribute would be set to 1 August 2013. This is used when creating time-based cash outputs as they need to span a whole period.

The particular example in this calculation is learning support funding, derived from LSF codes with associated date ranges which may not span whole months.

**the beginning of the learning delivery FAM's from date period =
MakeDate(ExtractYear(the learning delivery FAM's date applies from),
ExtractMonth(the learning delivery FAM's date applies from), 1)**

This is a way of determining the last period in which Learning Support Funding is to be generated, because for funding to be generated in a period, the Learning Delivery FAM's 'to' date has to reach the end of that period.

Like the attribute above, this one is used to ensure funding spans whole months, used for Learning Support in this calculation.

**the beginning of the period the day after the learning delivery FAM's to date =
MakeDate(ExtractYear(the date 1 days after the learning delivery FAM's date
applies to), ExtractMonth(the date 1 days after the learning delivery FAM's
date applies to), 1)**

Adjusted Start Date

When a learning aim is restarted, the ILR Original Start Date should be used to indicate when the learning aim started for the first time. If present, the original start date is used to determine the appropriate factor or funding rate to apply, so that the funding is calculated on the same basis as when the learning aim originally started.

the learning delivery's adjusted start date	
the learning delivery's original learning start date	the learning delivery's original learning start date is currently known and the learning delivery's original learning start date is certain
the learning delivery's learning start date	otherwise

These next two attributes use that adjusted start date as the date to lookup postcodes and other factors.

the learning delivery's applicable lookup factor date = the learning delivery's adjusted start date

the learning delivery's applicable postcode specialist resource lookup factor date = the learning delivery's adjusted start date

Period start and end dates

If the start date is 10 August 2013, this attribute would be set to 1 August 2013. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery's start date period =
MakeDate(ExtractYear(the learning delivery's learning start date),
ExtractMonth(the learning delivery's learning start date),1)

The next rules are used to determine the last period where funding is to be generated. For funding to be generated in a period, the planned or actual end date has to reach the end of that period. For example:

Planned end date = 10 August 2013. Below attribute = 1 August 2013.

Planned end date = 30 August 2013. Below attribute = 1 August 2013.

Planned end date = 31 August 2013. Below attribute = 1 September 2013.

the beginning of the period the day after the learning delivery's planned end date =
MakeDate(ExtractYear(the date 1 days after the learning delivery's learning
planned end date), ExtractMonth(the date 1 days after the learning delivery's
learning planned end date), 1)

the beginning of the period the day after the learning delivery's actual end date =
MakeDate(ExtractYear(the date 1 days after the learning delivery's learning
actual end date), ExtractMonth(the date 1 days after the learning delivery's
learning actual end date), 1)

If an aim starts and finishes in the same period, it always generates funding in that period (assuming other funding eligibility criteria are met).

the learning delivery's planned end date and start date are in the same period if

ExtractMonth(the learning delivery's learning planned end date) = ExtractMonth(the learning delivery's learning start date) and
ExtractYear(the learning delivery's learning planned end date) = ExtractYear(the learning delivery's learning start date)

the learning delivery's actual end date and start date are in the same period if

ExtractMonth(the learning delivery's learning actual end date) = ExtractMonth(the learning delivery's learning start date) and
ExtractYear(the learning delivery's learning actual end date) = ExtractYear(the learning delivery's learning start date)

If the actual end date is 10 August 2013, this attribute would be set to 1 August 2013. This is used when setting the time-based cash outputs as they have to span a whole period.

**the beginning of the learning delivery's actual end date period =
 MakeDate(ExtractYear(the learning delivery's learning actual end date),
 ExtractMonth(the learning delivery's learning actual end date), 1)**

This is a time-based attribute which is set to True for every day in the period of the aim's actual end date, using some of the attributes defined above.

This is used when assigning the balancing and job outcome payments, so that the temporal variable representing that funding spans the whole period.

the date is in the learning delivery's actual end date period	
true	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the beginning of the learning delivery's actual end date period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's actual end date period)
false	otherwise

Age

This is the learner's age at the start of the aim.

Note that this uses the adjusted start date which is based on the Original Start Date ILR field if completed.

the learning delivery's age at start	
uncertain	the learner's date of birth is unknown
the number of years between the learner's date of birth and the learning delivery's adjusted start date	the learner's date of birth is on or earlier than the learning delivery's adjusted start date
0	otherwise

This is the learner's age at the 31 August of the current funding year.

the learner's age at 31st August of the current funding year	
uncertain	the learner's date of birth is unknown
the number of years between the learner's date of birth and the 31st August of the current funding year	the learner's date of birth is on or earlier than the 31st August of the current funding year
0	otherwise

This attribute is used in the above, to determine the date of the 31st of August in the current funding year. The funding year is passed into the rulebase as an input, which reduces the number of dates we need to amend when creating the new rulebase for each new year.

the 31st August of the current funding year = MakeDate(ExtractYear(the current funding year start date), 8, 31)

Planned, Actual and Threshold Days

This is the number of days between the start date and the planned end date.

Because both the start date and planned end date are days when the learner is expected to be in learning, we need to add 1 day to the simple difference in dates.

the learning delivery's planned number of days in learning = 1 + DayDifference(the learning delivery's learning start date, the learning delivery's learning planned end date)

This is the number of days between the start date and the actual end date.

the learning delivery's actual number of days in learning	
1 + DayDifference(the learning delivery's learning start date, the learning delivery's learning actual end date)	the learning delivery's learning actual end date is currently known
0	otherwise

This is the number of days which the aim needs to be in learning for in order to be considered for funding.

There is an exception, implemented elsewhere, to count the learning aim as funded if it is achieved or completed (depending on which method applies to this learning aim).

the learning delivery's threshold days	
1	the learning delivery's planned number of days in learning ≥ 0 and the learning delivery's planned number of days in learning < 14
14	the learning delivery's planned number of days in learning ≥ 14 and the learning delivery's planned number of days in learning < 168
42	the learning delivery's planned number of days in learning ≥ 168
uncertain	otherwise

Funding Rates

52. This section determines funding rates.

Upper Case Conversion and generic LARS attributes

OPA is case sensitive but it is possible for funding categories in LARS to have mixed cases, so the LARS funding category is converted to upper-case here.

the learning delivery LARS funding's uppercase funding category = ToUpper(the learning delivery LARS funding's funding category)

These two attributes are required in order to use the "TemporalFromRange" function in later attributes. This function requires both start and end dates (as opposed to TemporalFromStartDate which uses a sequence of Start dates). So this creates the end/effective to dates where they are not present in the source data.

the learning delivery LARS funding's effective to date stage 1	
the date 1 day after the learning delivery LARS funding's effective to date	<div>the learning delivery LARS funding's effective to date is currently known and</div> <div>the learning delivery LARS funding's effective to date is certain</div>
Latest()	otherwise

This attribute is very similar to the one above, but applies to a different LARS input entity (LARS Devolved funding instead of LARS funding).

the learning delivery LARS devolved funding's effective to date stage 1	
the date 1 day after the learning delivery LARS devolved funding's effective to date	the learning delivery LARS devolved funding's effective to date is currently known and the learning delivery LARS devolved funding's effective to date is certain
Latest()	otherwise

Adult skills fund weighted rates

This uses a relationship which filters the input data from the LARS Funding data to just those with a funding category representing ASF. The integration process which passes data into the rulebase, only passes in data matching the learning aim reference form the ILR.

The attribute is a temporal variable showing the change of the weighted rate over time.

the learning delivery's ASF weighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding Adult Skills Fund funding categories, the learning delivery LARS funding's effective from date, the learning delivery LARS funding's effective to date stage 1, the learning delivery LARS funding's weighted rate)

This temporal attribute, based on the one above, sets the value to zero for periods where the stage 1 attribute is not defined.

the learning delivery's ASF weighted rate	
the learning delivery's ASF weighted rate stage 1	the learning delivery's ASF weighted rate stage 1 is currently known and the learning delivery's ASF weighted rate stage 1 is certain
0	otherwise

This attribute creates a temporal variable based on the LARS Devolved funding input. This input filters the LARS data to only include instances where the source of funding (SOF) matches the SOF of the input ILR data.

the learning delivery's devolved weighted rate stage 1 = TemporalFromRange(the learning delivery's LARS devolved funding rates with matching SOF, the learning delivery LARS devolved funding's effective from date, the learning delivery LARS devolved funding's effective to date stage 1, the learning delivery LARS devolved funding's weighted rate)

This temporal attribute, based on the one above, sets the value to minus 1 (rather than zero) for periods where the stage 1 attribute is not defined.

The reason we use minus 1 rather than zero, when a rate is not defined, is because it's possible a devolved authority may deliberately want to set a rate of zero for a learning aim. If they do this, we want to use this zero, rather than have the calculation defaulting to the non-devolved rate in later steps.

However if the rate appears to be minus 1 (because it hasn't matched in these steps) the calculation looks for the non-devolved rate instead.

the learning delivery's devolved weighted rate	
the learning delivery's devolved weighted rate stage 1	the learning delivery's devolved weighted rate stage 1 is currently known and the learning delivery's devolved weighted rate stage 1 is certain
-1	otherwise

Using the temporal variable above, attempt to determine the matching funding rate as at the adjusted start date for the learning aim. If the start date is before the funding method transition date (1 August 2024) return zero because these learning aims should be FM35 not FM38. ILR Validation should also prevent these from happening.

the learning delivery's applicable LARS devolved weighted rate	
ValueAt(the learning delivery's adjusted start date, the learning delivery's devolved weighted rate)	the learning delivery's adjusted start date is on or later than the funding method transition date
-1	otherwise

Determine which source to use for the LARS rate data; devolved or ESFA?

ESFA here does not mean that an aim is funded by the ESFA or DfE, merely that the nationally-defined rate is being used and not a specific rate defined by a devolved authority. The result from this decision also applies to the unweighted rate.

For free courses for jobs aims we always use the national rate.

The reason we use minus 1 rather than zero, when a rate is not defined, is because it's possible a devolved authority may deliberately want to set a rate of zero for a learning aim. If they do this, we want to use this zero, rather than have the calculation defaulting to the ESFA rate in later steps.

However if the rate appears to be minus 1 (because it hasn't matched in these steps) the calculation looks for the ESFA rate instead.

the learning delivery's LARS funding reference data source	
"Devolved"	<div>the learning delivery's applicable LARS devolved weighted rate is currently known and</div> <div>the learning delivery's applicable LARS devolved weighted rate is certain and</div> <div>the learning delivery's applicable LARS devolved weighted rate > -1 and</div> <div>the learning delivery's applicable LARS devolved unweighted rate is currently known and</div> <div>the learning delivery's applicable LARS devolved unweighted rate is certain and</div> <div>the learning delivery's applicable LARS devolved unweighted rate > -1 and</div> <div>the learning delivery is not eligible for free courses for jobs</div>
"ESFA"	otherwise

If we have decided to use the nationally-defined/ ESFA rate, determine the LARS lookup as at the adjusted start date. If the start date is before the funding method transition date (1 August 2024) return zero because these learning aims should be FM35 not FM38. ILR Validation should also prevent these from happening.

the learning delivery's applicable weighted rate from LARS	
ValueAt(the learning delivery's adjusted start date, the learning delivery's ASF weighted rate)	the learning delivery's LARS funding reference data source = "ESFA" and the learning delivery's adjusted start date is on or later than the funding method transition date
the learning delivery's applicable LARS devolved weighted rate	the learning delivery's LARS funding reference data source = "Devolved"
0	otherwise

Having determined which weighted rate to use, we may also need to add on some extra funding for ESOL aims. This is the resultant value of weighted rate which is used in the main calculation.

the learning delivery's applicable weighted rate	
the learning delivery's applicable weighted rate from ESOL Hours + the learning delivery's applicable weighted rate from LARS	the learning delivery is an ESOL aim
the learning delivery's applicable weighted rate from LARS	otherwise

Adult Skills Fund Unweighted Rates

Much of the logic here is similar to the equivalent logic for weighted rates.

This uses a relationship which filters the input data from the LARS Funding data to just those with a funding category representing ASF. The integration process which passes data into the rulebase, only passes in data matching the learning aim reference form the ILR.

The attribute is a temporal variable showing the change of the unweighted rate over time.

the learning delivery's ASF unweighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding Adult Skills Fund funding categories, the learning delivery LARS funding's effective from date, the learning delivery LARS funding's effective to date stage 1, the learning delivery LARS funding's unweighted rate)

This temporal attribute, based on the one above, sets the value to zero for periods where the stage 1 attribute is not defined.

the learning delivery's ASF unweighted rate	
the learning delivery's ASF unweighted rate stage 1	the learning delivery's ASF unweighted rate stage 1 is currently known and the learning delivery's ASF unweighted rate stage 1 is certain
0	otherwise

This attribute creates a temporal variable based on the LARS Devolved funding input. This input filters the LARS data to only include instances where the source of funding (SOF) matches the SOF of the input ILR data.

the learning delivery's devolved unweighted rate stage 1 = TemporalFromRange(the learning delivery's LARS devolved funding rates with matching SOF, the learning delivery LARS devolved funding's effective from date, the learning delivery LARS devolved funding's effective to date stage 1, the learning delivery LARS devolved funding's unweighted rate)

This temporal attribute, based on the one above, sets the value to minus 1 (rather than zero) for periods where the stage 1 attribute is not defined.

the learning delivery's devolved unweighted rate	
the learning delivery's devolved unweighted rate stage 1	the learning delivery's devolved unweighted rate stage 1 is currently known and the learning delivery's devolved unweighted rate stage 1 is certain
-1	otherwise

Using the temporal variable above, attempt to determine the matching funding rate as at the adjusted start date for the learning aim. If the start date is before the funding method transition date (1 August 2024) return zero because these learning aims should be FM35 not FM38. ILR Validation should also prevent these from happening.

the learning delivery's applicable LARS devolved unweighted rate	
ValueAt(the learning delivery's adjusted start date, the learning delivery's devolved unweighted rate)	the learning delivery's adjusted start date is on or later than the funding method transition date
-1	otherwise

Using the "source" attribute chosen for the weighted rate, use the same source to obtain the equivalent unweighted rate.

the learning delivery's applicable unweighted rate from LARS	
ValueAt(the learning delivery's adjusted start date, the learning delivery's ASF unweighted rate)	the learning delivery's LARS funding reference data source = "ESFA" and the learning delivery's adjusted start date is on or later than the funding method transition date
the learning delivery's applicable LARS devolved unweighted rate	the learning delivery's LARS funding reference data source = "Devolved"
0	otherwise

Having determined which weighted rate to use, we may also need to add on some extra funding for ESOL aims. This is the resultant value of weighted rate which is used in the main calculation.

the learning delivery's applicable unweighted rate	
the learning delivery's applicable unweighted rate from ESOL Hours + the learning delivery's applicable unweighted rate from LARS	the learning delivery is an ESOL aim
the learning delivery's applicable unweighted rate from LARS	otherwise

Additional Funding for ESOL Aims

For learning aims which are English for Speakers of Other Languages (ESOL), providers may need to deliver additional learning to individual learners that incurs additional costs above the qualification rate. Where additional hours are required, the provider can record these on the ILR using the 'additional delivery hours' field. This is used to calculate an additional funding rate which is added to the main funding rate.

For non-devolved provision, the additional hours generate a rate of £6 per hour, in line with the main learning aim rates. This is represented by the ESFA ESOL rate per additional hour in the table below.

However devolved authorities can specify a different rate, which is specified in the devolved flexibility map table.

This first attribute determines the applicable rate per hour to use

the learning delivery's applicable ESOL rate per hour	
0	the learning delivery is not an ESOL aim
the learning delivery's devolved ESOL rate per hour	the learning delivery's devolved ESOL rate per hour is currently known and the learning delivery's devolved ESOL rate per hour is certain and the learning delivery's devolved ESOL rate per hour > 0 the learning delivery's LARS funding reference data source = "Devolved"
the ESFA ESOL rate per additional hour	Otherwise

This attribute multiplies the hours to determine the rate to add for this learning aim.

the learning delivery's applicable weighted rate from ESOL Hours	
0	the learning delivery is not a start for funding purposes or the learning delivery is not an ESOL aim or the learning delivery's additional delivery hours is unknown or the learning delivery's additional delivery hours is uncertain or the learning delivery's applicable ESOL rate per hour = 0
the learning delivery's applicable ESOL rate per hour * the learning delivery's additional delivery hours	otherwise

ESOL aims don't have weighting based on their subject area, so the unweighted rate to add is the same as the weighted rate.

the learning delivery's applicable unweighted rate from ESOL Hours = the learning delivery's applicable weighted rate from ESOL Hours

Free Courses for Jobs/ Policy Uplifts

Qualifications which are on the national list of Free courses for jobs qualifications have an additional funding uplift.

This attribute shows the rate. LARS Category codes are used to identify the two different rates in use.

The first row in the table is to address a problem we found in testing where learning aims starting before 1 August 2024 were getting 0 from the main LARS rate but they were getting 150/ 600 uplift from rate 1 and rate 2. Because this funding model is intended to start on 1 August 2024, we think the answer should be 0. In live systems this should be prevented by ILR validation rules, but we have left the logic in place.

the learning delivery's free courses for jobs uplift rate	
0	the learning delivery's adjusted start date < the funding method transition date
the free courses for jobs uplift rate 1	it is certain whether or not the learning delivery is eligible for free courses for jobs and the learning delivery is eligible for free courses for jobs and it is certain whether or not the learning delivery LARS category is NSF level 3 free courses for jobs rate 1 and the learning delivery LARS category is NSF level 3 free courses for jobs rate 1
the free courses for jobs uplift rate 2	it is certain whether or not the learning delivery is eligible for free courses for jobs and the learning delivery is eligible for free courses for jobs and it is certain whether or not the learning delivery LARS category is NSF level 3 free courses for jobs rate 2 and the learning delivery LARS category is NSF level 3 free courses for jobs rate 2
0	otherwise

We have a more generic "policy uplift" rate output which can be shown on reports and could apply for other uplifts as well as free course for jobs. (In the FM35 calculation there were some other uplifts.)

the learning delivery's policy uplift rate = the learning delivery's free courses for jobs uplift rate

The policy uplift category is an output intended to be shown on funding reports to show the source of a rate uplift.

As with the rate table above, the first row in the table is to address a problem we found in testing where learning aims starting before 1 August 2024 were getting policy uplifts. In live systems this should be prevented by ILR validation rules, but we have left the logic in place.

the learning delivery's policy uplift category	
“None”	the learning delivery's adjusted start date < the funding method transition date
“Free Courses for Jobs (rate 1)”	the learning delivery's free courses for jobs uplift rate is currently known and the learning delivery's free courses for jobs uplift rate is certain and it is certain whether or not the learning delivery is eligible for free courses for jobs and the learning delivery is eligible for free courses for jobs and it is certain whether or not the learning delivery LARS category is NSF level 3 free courses for jobs rate 1 and the learning delivery LARS category is NSF level 3 free courses for jobs rate 1
“Free Courses for Jobs (rate 2)”	the learning delivery's free courses for jobs uplift rate is currently known and the learning delivery's free courses for jobs uplift rate is certain and it is certain whether or not the learning delivery is eligible for free courses for jobs and the learning delivery is eligible for free courses for jobs and it is certain whether or not the learning delivery LARS category is NSF level 3 free courses for jobs rate 2 and the learning delivery LARS category is NSF level 3 free courses for jobs rate 2
“None”	otherwise

For the base unweighted rate, add the policy uplift rate (if present) as derived above.

For devolved provision, the devolved authority uplift factor is specified in the devolved flexibility map table.

However no factors are currently specified apart from the default of 1.0.

Currently the policy is that devolved free course for jobs aims are funded using the non-devolved rates, so there should not be a case where both types of uplift apply at once.

the learning delivery's base unweighted rate with policy uplift	
the learning delivery's base unweighted value + the learning delivery's policy uplift rate	the learning delivery's policy uplift rate is certain and the learning delivery's policy uplift rate > 0
the learning delivery's base unweighted value * the learning delivery's devolved authority uplift factor	the learning delivery's devolved authority uplift factor is certain and the learning delivery's devolved authority uplift factor > 1 and the learning delivery's devolved authority uplift policy code is certain and the learning delivery's devolved authority uplift policy code <> "None" and it is certain whether or not the learning delivery should use the exceptional calc method for area cost and disadvantage and the learning delivery should not use the exceptional calc method for area cost and disadvantage
the learning delivery's base unweighted value	otherwise

For the weighted rate, the additional policy uplifts for free course for jobs are not included in the specialist resources uplift. So the specialist resources uplift is applied to the rate before the free courses for jobs uplift is added.

the learning delivery's weighted rate with specialist resources = the learning delivery's applicable weighted rate * the learning delivery's specialist resources uplift

As with the unweighted rate above, add the policy uplift to the weighted rate.

For devolved provision, the devolved authority uplift factor is specified in the devolved flexibility map table.

However no factors are currently specified apart from the default of 1.0.

Currently the policy is that devolved free course for jobs aims are funded using the non-devolved rates, so there should not be a case where both types of uplift apply at once.

the learning delivery's weighted rate with policy uplift	
the learning delivery's weighted rate with specialist resources + the learning delivery's policy uplift rate	the learning delivery's policy uplift rate is certain and the learning delivery's policy uplift rate > 0
the learning delivery's weighted rate with specialist resources * the learning delivery's devolved authority uplift factor	the learning delivery's devolved authority uplift factor is certain and the learning delivery's devolved authority uplift factor > 1 and the learning delivery's devolved authority uplift policy code is certain and the learning delivery's devolved authority uplift policy code <> "None" and it is certain whether or not the learning delivery should use the exceptional calc method for area cost and disadvantage and the learning delivery should not use the exceptional calc method for area cost and disadvantage
the learning delivery's weighted rate with specialist resources	otherwise

Specialist Resources Uplift – LARS Inputs

The specialist resources uplift is for certain learning aims, where they are delivered by certain providers or at certain delivery locations within a provider. Where these learning aims are delivered by these providers, the funding rate is uplifted. The same learning aim does not attract the uplift for other providers.

For 2024/25, , the value of specialist resources uplift changed for ESFA-funded provision with the introduction of adult skills fund rates. However devolved authorities did not have to follow the ESFA's rates.

To allow them to specify different uplifts, there is an additional field within the LARS Devolved funding which allows a different value to be specified alongside a different devolved rate.

This creates a temporal attribute with the series of values for the specialist uplift factor specified by devolved authorities

the learning delivery's LARS devolved specialist uplift stage 1 =

TemporalFromRange(the learning delivery's LARS devolved funding rates with matching SOF, the learning delivery LARS devolved funding's effective from date, the learning delivery LARS devolved funding's effective to date stage 1, the learning delivery LARS devolved funding's specialist uplift)

This is another temporal attribute, based on the one above. The value is set to minus 1 if there is no factor specified.

the learning delivery's LARS devolved specialist uplift	
the learning delivery's LARS devolved specialist uplift stage 1	the learning delivery's LARS devolved specialist uplift stage 1 is currently known and the learning delivery's LARS devolved specialist uplift stage 1 is certain
-1	otherwise

Determine the value of the uplift as at the learning delivery's adjusted start date.

the learning delivery's applicable LARS devolved specialist uplift	
ValueAt(the learning delivery's adjusted start date, the learning delivery's LARS devolved specialist uplift)	the learning delivery's adjusted start date is on or later than the funding method transition date
-1	otherwise

The funding band represents the weighting which is applied to the learning aim rate, based on the subject of the learning aim. For this calculation we are interested in the learning aims where this is "SPECIALIST"

This creates a temporal attribute with details of how the funding band changes over time. Note that this is a temporal text attribute not a number.

the learning delivery's ASF funding band stage 1 = TemporalFromRange(the learning delivery's LARS Funding Adult Skills Fund funding categories, the learning delivery LARS funding's effective from date, the learning delivery LARS funding's effective to date stage 1, ToUpper(the learning delivery LARS funding's adult skills funding band))

Another temporal attribute based on the one above. Where there is no value defined by the above, and because this is a text, attribute, the attribute is set to the text "UNKNOWN" over that time period.

the learning delivery's ASF funding band	
the learning delivery's ASF funding band stage 1	the learning delivery's ASF funding band stage 1 is currently known and the learning delivery's ASF funding band stage 1 is certain
"UNKNOWN"	otherwise

Using the temporal text attribute created above, determine the value as at the adjusted start date.

the learning delivery's applicable LARS ASF funding band	
ValueAt(the learning delivery's adjusted start date, the learning delivery's ASF funding band)	the learning delivery's adjusted start date is on or later than the funding method transition date
"UNKNOWN"	otherwise

Specialist Resources Uplift – Organisations and Overall Uplift

The specialist resources uplift is for certain learning aims, where they are delivered by certain providers or at certain delivery locations within a provider. Where these learning aims are delivered by these providers, the funding rate is uplifted. The same learning aim does not attract the uplift for other providers.

This attribute is a temporal, based on the source organisational funding data having a single record with the period when the specialist resource status applies.

the organisation reference data has a valid factor if

TemporalOnOrAfter(the organisation funding's effective from date) and
either

all

the organisation funding's effective to date is currently known and
TemporalOnOrBefore(the organisation funding's effective to date)

or

the organisation funding's effective to date is currently unknown

For the organisational reference data, look for a funding factor of Specialist Resources (converted to upper case)

the organisation reference data has an applicable specialist resource uplift if

the organisation funding's funding factor value is currently known and
the organisation funding's funding factor value starts with "1" and
the organisation funding's funding factor is currently known and
the organisation funding's upper case funding factor = "SPECIALIST RESOURCES"

This is a temporal attribute created from the postcode specialist resource data.

The integration code which passes the data into the rulebase will already have filtered the postcode records to only include those with a matching UKPRN. However this data is not filtered by postcode.

This is delivery location postcodes for a provider which attract the specialist uplift.

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

This temporal attribute is the sequence of specialist resource records which match the delivery location postcode of the learning aim.

the learning delivery's postcode specialist resource flags =

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

Determine the value of the specialist postcode flag on the lookup factor date (which is the adjusted start date).

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

This attribute determines whether the learning delivery is delivered by a provider, or in a location, where the specialist uplift might apply.

The uplift itself is calculated in a later step and also depends on whether the learning aim has the uplift.

If the delivery location is in the list of specialist postcodes with a flag of Y, then the learning delivery is eligible. If the location is on the list but the flag is N then the learning delivery is definitely not eligible.

If the flag is set in the organisational level data, then in general it will be eligible. However, if we have specified one or more postcodes for a provider in the postcode specialist resource table, any other postcodes will not attract the uplift, regardless of the organisational level flag.

the learning delivery has specialist resources	
true	<p>the learning delivery's applicable postcode specialist resource flag is currently known and</p> <p>the learning delivery's applicable postcode specialist resource flag is certain and</p> <p>the learning delivery's applicable postcode specialist resource flag = "Y"</p>
false	<p>the learning delivery's applicable postcode specialist resource flag is currently known and</p> <p>the learning delivery's applicable postcode specialist resource flag is certain and</p> <p>the learning delivery's applicable postcode specialist resource flag = "N"</p>
true	<p>the learning delivery's count of provider postcode specialist resource records = 0 and</p> <p>the learning delivery's count of organisation funding reference records > 0 and</p> <p>for at least one of the organisation funding reference data</p> <p>ValueAt(the learning delivery's applicable lookup factor date, the organisation reference data has a valid factor) and</p> <p>the organisation reference data has an applicable specialist resource uplift</p>
false	otherwise

This is the applicable specialist resources uplift factor. This is set if both the provider / delivery location are eligible, and the learning aim is eligible.

For devolved provision where a rate has been specified by the devolved authority, they would also specify the value of the uplift factor.

For provision funded using the non-devolved funding rates, the uplift is defined in a parameter.

the learning delivery's specialist resources uplift	
the learning delivery's applicable LARS devolved specialist uplift	<p>the learning delivery's LARS funding reference data source = "Devolved" and</p> <p>the learning delivery's applicable LARS devolved specialist uplift is currently known and</p> <p>the learning delivery's applicable LARS devolved specialist uplift is certain and</p> <p>the learning delivery's applicable LARS devolved specialist uplift > 0</p> <p>the learning delivery has specialist resources</p>
the default ESFA specialist resource uplift	<p>the learning delivery's LARS funding reference data source = "ESFA" and</p> <p>the learning delivery's applicable LARS ASF funding band = "SPECIALIST" and</p> <p>the learning delivery has specialist resources</p>
1	otherwise

Long Term Residential College Uplift

In previous years, if the aim is residential, and the provider is a long term residential college, then the ESFA funding was uplifted.

However this policy no longer applied to ESFA-funded new starts from August 2024 and so this policy no longer applies to non-devolved provision.

We have left some of the logic in place, in case devolved authorities wanted to use this mechanism. However since 2024/25, none have asked us to use this.

This attribute looks at the organisational funding data for the factor of Long term residential (converted to upper case).

the organisation reference data has an applicable LTRC uplift if

the organisation funding's funding factor value is currently known and
the organisation funding's funding factor value starts with "1" and
the organisation funding's funding factor is currently known and
the organisation funding's upper case funding factor = "LONG TERM
RESIDENTIAL"

For this learning delivery, determine if the organisational flag was in place at the lookup factor date (which is the adjusted start date).

the learning delivery is at a long-term residential college if

the learning delivery's count of organisation funding reference records > 0 and
for at least one of the organisation funding reference data

ValueAt(the learning delivery's applicable lookup factor date, the organisation
reference data has a valid factor) and

the organisation reference data has an applicable LTRC uplift

This attribute is intended to show the uplift factor to be applied.

For devolved provision, the "stage 1" attribute is specified in the devolved flexibility map table.

However no factors are currently specified apart from the default of 1.0. Therefore at present this table will always return the "otherwise" option of 1

the learning delivery's devolved policy long term residential college uplift	
the learning delivery's devolved policy long term residential college uplift stage 1	the learning delivery's devolved policy long term residential college uplift stage 1 is currently known and the learning delivery's devolved policy long term residential college uplift stage 1 is certain and the learning delivery's devolved policy long term residential college uplift stage 1 > 1
1	otherwise

This attribute applies the factor above if the provider is one of those with the organisational flag above. In addition "the learning delivery is residential" attribute is derived from an LDM code on the learning delivery for that learner, and this must also be set for the uplift to apply.

In practice, for 2024/25, the uplift is always 1.0.

the learning delivery's LTRC uplift	
the learning delivery's devolved policy long term residential college uplift	the learning delivery is at a long-term residential college and the learning delivery is residential
1	otherwise

Funding

53. This section includes the calculations of the main funding outputs.

Start Indicator

The aim counts as a start for funding purposes if it has no actual end date, or if the actual number of days in learning meets the threshold number of days. Depending on whether the 20% for this learning aim is paid on Completion or Achievement, the aim also counts as a start if the aim is completed or achieved respectively.

the learning delivery is a start for funding purposes	
false	the learning delivery's funding model <> 38 and the learning delivery's funding model <> 81
false	the learning delivery's funding model = 81 and the learning delivery's funding line type = "None"
true	the learning delivery's learning actual end date is unknown
true	the learning delivery's calculation should use a completion percentage and the learning delivery has been completed
true	the learning delivery's calculation should use an achievement percentage and the learning delivery's outcome is currently known and the learning delivery's outcome = 1
true	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion and the learning delivery has been completed
true	the learning delivery's actual number of days in learning is currently known and the learning delivery's threshold days is currently known and the learning delivery's actual number of days in learning >= the learning delivery's threshold days
false	otherwise

Monthly Instalments

This is planned number of instalments for the aim, which is the number of periods between the start date and the planned end date, with two instalments in the first period.

the learning delivery's planned instalments	
0	the learning delivery is not a start for funding purposes
2	the learning delivery's planned end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the beginning of the period the day after the learning delivery's planned end date	otherwise

The aim always receives a double instalment in the first period and a single instalment in subsequent periods, up to the earlier of the planned end date and actual end date.

From the second period onwards, the aim only receives funding if it reaches the end of that period.

the learning delivery's number of instalments this period	
2	TemporalOnOrAfter(the beginning of the learning delivery's start date period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's start date period)
1	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the date 1 months after the beginning of the learning delivery's start date period) and TemporalBefore(the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date)
1	the learning delivery's learning actual end date is unknown and TemporalOnOrAfter(the date 1 months after the beginning of the learning delivery's start date period) and TemporalBefore(the beginning of the period the day after the learning delivery's planned end date)
0	otherwise

This is the number of periods between the start date and the earlier of the planned end date and actual end date, with two instalments in the first period.

the learning delivery's actual instalments	
the learning delivery's planned instalments	the learning delivery's learning actual end date is unknown
0	the learning delivery is not a start for funding purposes
2	the learning delivery's planned end date and start date are in the same period or the learning delivery's actual end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date	otherwise

This is the difference between the number of planned instalments and the number of actual instalments. This is used to calculate the balancing payment, as detailed elsewhere, if applicable.

the learning delivery's outstanding instalments = the learning delivery's planned instalments - the learning delivery's actual instalments

Proportion of Funding Remaining

This is a combination of the funding adjustment for prior learning and the other funding adjustment multiplied together.

This factor is applied to monthly instalments (on-programme and balancing).

the learning delivery's proportion of funding remaining	
(the learning delivery's other funding adjustment / 100) * (the learning delivery's funding adjustment for prior learning / 100)	the learning delivery's other funding adjustment is currently known and the learning delivery's funding adjustment for prior learning is currently known
the learning delivery's other funding adjustment / 100	the learning delivery's other funding adjustment is currently known
the learning delivery's funding adjustment for prior learning / 100	the learning delivery's funding adjustment for prior learning is currently known
1	otherwise

In some cases, the funding adjustment factors are also applied to the completion or achievement cash (including job outcome payments).

The other funding adjustment always applies across all cash values except learning support funding.

The adjustment for prior learning applies to the achievement or completion cash if the aim is not a restart.

the learning delivery's proportion of funding remaining for achievement or completion	
the learning delivery's other funding adjustment / 100	the learning delivery is a restart and the learning delivery's other funding adjustment is currently known
the learning delivery's proportion of funding remaining	the learning delivery is not a restart
1	otherwise

Aim Value and Non-Government Contribution

The aim value is the full value of the learning aim including all the various uplift factors.

the learning delivery's aim value	
the learning delivery's weighted rate with policy uplift * the learning delivery's LTRC uplift * the learning delivery's adjusted area cost factor * the learning delivery's adjusted disadvantage uplift	the learning delivery is a start for funding purposes and the learning delivery's funding line type <> "None"
0	otherwise

The difference between this and the applicable unweighted rate is that this is set to zero if the learning aim is not eligible for funding.

the learning delivery's base unweighted value	
the learning delivery's applicable unweighted rate	the learning delivery is a start for funding purposes and the learning delivery's funding line type <> "None"
0	otherwise

The non-Government contribution is the part of the aim value amount which the government (national government or devolved authority) do not contribute, if a learning aim is co-funded. This is the amount which the provider may collect from a learner for example. This non-Government contribution is based on 50% of the unweighted rate for an aim, without any uplifts.

This means that two learners on a similar learning aim in different subjects would contribute the same. Another example is that if two learners were doing the same learning aim but one came from a disadvantaged area, the non-Government contribution would be the same even though the aim value would be higher for the learner from the disadvantaged area.

the learning delivery's non-government contribution	
the learning delivery's base unweighted rate with policy uplift * the national non-government percentage	the learning delivery is not fully funded
0	otherwise

On-Programme Payments

This is a time-based attribute which is the percentage of the aim value that will be paid as on-programme funding in each period.

It is calculated as 100% minus the amount held back for achievement/completion, multiplied by the proportion of funding remaining, and then divided up among the planned instalments.

The same percentage value is used to calculate the uncapped on-programme cash, and then the main cash value.

the learning delivery's on-programme percentage	
(the learning delivery's number of instalments this period / the learning delivery's planned instalments) * the learning delivery's proportion of funding remaining	the learning delivery is a start for funding purposes and the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
(1 - the default achievement or completion percentage) * (the learning delivery's number of instalments this period / the learning delivery's planned instalments) * the learning delivery's proportion of funding remaining	the learning delivery is a start for funding purposes
0	otherwise

The uncapped cash values are used to calculate the cap factor, which in turn is used to calculate the capped cash values. Although the ESFA in 2024/25 stopped applying a cap on maximum funding for a learner, it is still an option for devolved funding.

the learning delivery's uncapped on-programme cash	
(1 - the default achievement or completion percentage) * the learning delivery's base unweighted value * the learning delivery's on-programme percentage	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion and the learning delivery is a start for funding purposes
the learning delivery's base unweighted value * the learning delivery's on-programme percentage	the learning delivery is a start for funding purposes
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the on-programme percentage calculated above and the cap factor.

the learning delivery's on-programme payment	
(the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's on-programme percentage * the learning delivery's cap factor	the learning delivery is a start for funding purposes
0	otherwise

Balancing Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as a balancing payment.

Balancing payments are only generated if the learning aim has been achieved.

The same percentage value is used to calculate the uncapped balancing cash, and then the main cash value.

the learning delivery's balancing percentage	
(the learning delivery's outstanding instalments / the learning delivery's planned instalments) * the learning delivery's proportion of funding remaining	<p>the learning delivery should use the exceptional calc method with zero percentage for achievement or completion and</p> <p>the learning delivery has been completed and</p> <p>the learning delivery's planned instalments > 0 and</p> <p>the date is in the learning delivery's actual end date period</p>
0	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
(1 - the default achievement or completion percentage) * (the learning delivery's outstanding instalments / the learning delivery's planned instalments) * the learning delivery's proportion of funding remaining	<p>the learning delivery's calculation should use an achievement percentage and</p> <p>the learning delivery has been achieved and</p> <p>the learning delivery's planned instalments > 0 and</p> <p>the date is in the learning delivery's actual end date period</p>
(1 - the default achievement or completion percentage) * (the learning delivery's outstanding instalments / the learning delivery's planned instalments) * the learning delivery's proportion of funding remaining	<p>the learning delivery's calculation should use a completion percentage and</p> <p>the learning delivery has been completed and</p> <p>the learning delivery's planned instalments > 0 and</p> <p>the date is in the learning delivery's actual end date period</p>

(1 - the default achievement or completion percentage) * (the learning delivery's outstanding instalments / the learning delivery's planned instalments) * the learning delivery's proportion of funding remaining	the learning delivery's planned instalments > 0 and the date is in the learning delivery's actual end date period and the learning delivery should use the exceptional calc method for area cost and disadvantage
0	otherwise

The uncapped cash values are used to calculate the cap factor, which in turn is used to calculate the capped cash values.

the learning delivery's uncapped balancing payment	
(1 - the default achievement or completion percentage) * the learning delivery's base unweighted value * the learning delivery's balancing percentage	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
the learning delivery's base unweighted value * the learning delivery's balancing percentage	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the balancing percentage calculated above and the cap factor.

the learning delivery's balancing payment = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's balancing percentage * the learning delivery's cap factor

Completion and Achievement – preliminary steps

the learning delivery has been completed if

the learning delivery's completion status = 2 and
the learning delivery's learning actual end date is currently known

the learning delivery has been achieved if

the learning delivery has been completed and
the learning delivery's outcome is currently known and
the learning delivery's outcome = 1

An aim is eligible for an aim achievement payment if it achieves. Apprenticeship Knowledge or Competency aims are a special case because they do not receive their aim achievement payment until the related Apprenticeship programme aim achieves.

The relationship between Apprenticeship aims includes the pathway in this case.

the learning delivery is eligible for an achievement payment	
false	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion or the learning delivery's calculation should not use an achievement percentage
true	the learning delivery has been achieved
false	otherwise

the learning delivery is eligible for a completion payment	
false	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion or the learning delivery's calculation should not use a completion percentage
true	the learning delivery has been completed
false	otherwise

Aim Achievement Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as an aim achievement payment, if it is eligible. The aim achievement percentage is reduced if the aim also receives a job outcome payment.

The percentage is zero if the exceptional calculation method is being used (intended for short aims representing a fixed payment) or if the calculation of the 20% element is based on completion rather than achievement.

the learning delivery's achievement percentage	
0	<p>the learning delivery should use the exceptional calc method with zero percentage for achievement or completion or</p> <p>the learning delivery's calculation should not use an achievement percentage</p>
(the default achievement or completion percentage – the default job outcome percentage) * the learning delivery's proportion of funding remaining for achievement or completion	<p>the learning delivery is eligible for an achievement payment and</p> <p>the date is in the learning delivery's actual end date period and</p> <p>the learning delivery is eligible for a job outcome payment</p>
the default achievement or completion percentage * the learning delivery's proportion of funding remaining for achievement or completion	<p>the learning delivery is eligible for an achievement payment and</p> <p>the date is in the learning delivery's actual end date period and</p> <p>the learning delivery is not eligible for a job outcome payment</p>
0	otherwise

This is the actual cash value. It is the weighted aim value minus the non-government contribution, multiplied by the achievement percentage calculated above and the cap factor.

the learning delivery's achievement payment = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's achievement percentage * the learning delivery's cap factor

Aim Completion Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as an aim completion payment, if it is eligible. The percentage is reduced if the aim also receives a job outcome payment.

The percentage is zero if the exceptional calculation method is being used (intended for short aims representing a fixed payment) or if the calculation of the 20% element is based on achievement rather than completion.

the learning delivery's completion percentage	
0	<p>the learning delivery should use the exceptional calc method with zero percentage for achievement or completion or</p> <p>the learning delivery's calculation should not use a completion percentage</p>
(the default achievement or completion percentage – the default job outcome percentage) * the learning delivery's proportion of funding remaining for achievement or completion	<p>the learning delivery is eligible for a completion payment and</p> <p>the date is in the learning delivery's actual end date period and</p> <p>the learning delivery is eligible for a job outcome payment</p>
the default achievement or completion percentage * the learning delivery's proportion of funding remaining for achievement or completion	<p>the learning delivery is eligible for a completion payment and</p> <p>the date is in the learning delivery's actual end date period and</p> <p>the learning delivery is not eligible for a job outcome payment</p>
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the completion percentage calculated above and the cap factor.

the learning delivery's completion payment = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's completion percentage * the learning delivery's cap factor

This achievement element cash value is not used elsewhere in the calculation, but is produced as an output to aid interpretation of the funding calculation results.

It represents the maximum achievement cash that a learner might generate if they achieve, and stays the same regardless of whether the learner actually achieves the aim or a job outcome.

the learning delivery's achievement element	
0	<p>the learning delivery should use the exceptional calc method with zero percentage for achievement or completion or</p> <p>the learning delivery's calculation should not use an achievement percentage</p>
(the learning delivery's aim value - the learning delivery's non-government contribution) * the default achievement or completion percentage * the learning delivery's cap factor * the learning delivery's proportion of funding remaining for achievement or completion	otherwise

The completion element is much the same as the achievement element above; not used in further calculations but produced as an additional output.

the learning delivery's completion element	
0	<p>the learning delivery should use the exceptional calc method with zero percentage for achievement or completion or</p> <p>the learning delivery's calculation should not use a completion percentage</p>
(the learning delivery's aim value - the learning delivery's non-government contribution) * the default achievement or completion percentage * the learning delivery's cap factor * the learning delivery's proportion of funding remaining for achievement or completion	otherwise

Eligibility for Job Outcome Payment

The aim is eligible for a job outcome payment if it has an actual end date and has a learner employment status with a monitoring code representing a job outcome.

The use of learner employment status is a change from the previous calculation, as the Employment Outcome field (at learning delivery level) is no longer in the ILR.

The relationship: "the learning delivery's applicable employment statuses representing job outcomes" looks for employment status records which are on or before the learning actual end date, and on or after the learning start date. If at least one of these has the flag representing a job outcome, the learning aim is eligible for a job outcome payment

the learning delivery is eligible for a job outcome payment	
false	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
true	<div>the learning delivery's learning actual end date is currently known and</div> <div>the learning delivery's learning actual end date is certain and</div> <div>for at least one of the learning delivery's applicable employment statuses representing job outcomes</div> <div>the learner employment status represents a job outcome</div>
false	otherwise

Job Outcome Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as a job outcome payment, if it is eligible for one.

the learning delivery's job outcome percentage	
0	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion
the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement or completion	the learning delivery is eligible for a job outcome payment and the date is in the learning delivery's actual end date period
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the job outcome percentage calculated above and the cap factor.

the learning delivery's job outcome payment = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's job outcome percentage * the learning delivery's cap factor

Cap Factor

54. The ESFA changed the calculation for nationally-funded provision from 2024/25, so that the calculation would no longer apply a funding cap to each learner with the provider for each year.
55. However devolved authorities indicated they may still wish to do this at some point, so we have included logic to do this within the rulebase. However for the 2024 to 2025 funding year, no authorities asked to use this capability.
56. If we did apply a funding cap, the maximum value would be specified by each devolved authority. The maximum value would be applied per learner per year, before any weightings or government contribution calculations are applied.

This step retrieves the cap amount specified by the devolved authority's policy. We retrieve this at learning delivery level because of the (unlikely) possibility that a learner may move house and be funded by different authorities within the same funding year.

the learning delivery's devolved policy cap amount including achievement and completion	
the learning delivery's devolved policy cap amount including achievement and completion stage 1	<div>the learning delivery's devolved policy cap amount including achievement and completion stage 1 is currently known and</div> <div>the learning delivery's devolved policy cap amount including achievement and completion stage 1 is certain</div>
999999999	otherwise

For the learning delivery-level value above, we aggregate these to get a single value for the learner within the current funding year.

This uses the relationship: the learner's learning deliveries within the current funding year

the learner's highest cap amount including achievement and completion = the greatest of the learning delivery's devolved policy cap amount including achievement and completion for all of the learner's learning deliveries within the current funding year

The above attribute is the normal maximum cap value. However, in calculating the cap for a learner, we exclude the 20% to be paid on completion or achievement. This is to avoid learners appearing uncapped all year, but triggering the cap at the end of the year when they complete or achieve.

So the calculation actually takes 80% of the aim value and compares that against 80% of the policy cap threshold value. This attribute is that 80% threshold value

the learner's cap amount excluding achievement and completion = the learner's highest cap amount including achievement and completion * (1 - the default achievement or completion percentage)

This next step calculates a value for the learner, across learning aims marked as eligible to be capped.

Total the uncapped on-programme and balancing funding for the learner. Note that although completion and achievement funding are not part of the calculation of the cap, the resultant cap factor will be applied to completion or achievement funding if there is any.

The IntervalDailySumIf function converts the time-based on-programme and balancing payments into a single non time-based value, using the values as at the last day of each period.

the learner's total uncapped funding = IntervalDailySumIf(the current funding year start date, the date 1 days after the current funding year end date, ((the learning delivery's uncapped on-programme cash totalled for all of the learner's learning deliveries for which it is the case that the learning delivery is eligible for capping) + (the learning delivery's uncapped balancing payment totalled for all of the learner's learning deliveries for which it is the case that the learning delivery is eligible for capping)), the date is the last day of the period)

Cap the learner's funding if it goes over the yearly cap amount (excluding achievement). For example, if the total un-capped funding is twice the yearly cap amount, the cap factor would be 50%.

the learner's cap factor	
the learner's cap amount excluding achievement and completion / the learner's total uncapped funding	the learner's total uncapped funding > the learner's cap amount excluding achievement and completion
1	otherwise

Apply the learner's cap factor to all learning deliveries eligible for capping. This should take account of capping policy variations across devolved authorities and non-devolved provision- for instance non-devolved aims are not eligible for capping.

the learning delivery's cap factor	
1	the learning delivery is not eligible for capping
the learner's cap factor	otherwise

Currently (for the 2024 to 2025 year and 2025 to 2026) the values in the devolved flexibility map table should always return "the learning delivery's devolved policy is to apply capping"= FALSE.

That is, the version of the statement seen in this table: "the learning delivery's devolved policy is **not** to apply capping" is always TRUE.

Therefore, at present, "the learning delivery is eligible for capping" should always be FALSE.

the learning delivery is eligible for capping	
false	for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "DAM" and the learning delivery FAM's numeric code = 43
false	the learning delivery's funding organisation code <> "ESFA" and the learning delivery's funding organisation code <> "None" and the learning delivery should use the exceptional calc method for area cost and disadvantage
false	it is certain whether or not the learning delivery's devolved policy is to apply capping and the learning delivery's devolved policy is not to apply capping
true	otherwise

Learning Support Funding

57. This section calculates learning support funding, where this can be derived from the ILR.

Determine the Learning Support rate based on the funding line type. Currently all funding line types attract the same rate but by holding the rates in this way there is flexibility to hold differing rates in future, if required, as has happened in the past.

the learning delivery's LSF rate	
150	the learning delivery's funding line type <> "None"
0	otherwise

The following attribute is a Temporal attribute which can take different values on different dates.

Aims are only eligible for Learning Support in a period if the start date is in that period, the actual end date (if known) reaches the end of that period, the Learning Delivery FAM's 'from' date is in that period, and the Learning Delivery FAM's 'to' date reaches the end of that period.

One change since FM35 is that we have removed the rule to require an aim to have a planned (and actual if known) length of at least one calendar month to be eligible for LSF.

In FM38, these shorter aims can still generate learning support funding if the LSF code is set for at least one day during that learning aim. The second logic row in the table always generates funding in the aim's first period if there is an LSF flag present with an effective date in that period which starts on the same day as the learning aim.

the learning delivery is eligible for LSF in the period	
false	<p>the learning delivery is not a start for funding purposes</p> <p><i>the learning delivery's learning planned end date is earlier than the date 1 months after the learning delivery's learning start date</i></p>
true	<p>This logic applies in the first period of the learning aim. If there is an LSF flag that starts in the same period as the learning aim start date then it generates learning support in the first month. We do not check the exact dates of the LSF period and 1 day is enough to generate the LSF cash.</p> <p>TemporalOnOrAfter(the beginning of the learning delivery's start date period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's start date period) for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = "LSF" and the learning delivery FAM's numeric code = 1 and the beginning of the learning delivery's start date period = the beginning of the learning delivery FAM's from date period and TemporalOnOrAfter(the beginning of the learning delivery FAM's from date period) <i>TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)</i></p>
true	<p>the learning delivery's learning actual end date is currently known and for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = "LSF" and the learning delivery FAM's numeric code = 1 and TemporalOnOrAfter(the beginning of the learning</p>

	<p>delivery FAM's from date period)</p> <p>TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)</p> <p>and</p> <p><i>the date is in the current funding year and</i></p> <p>TemporalOnOrAfter(the beginning of the learning delivery's start date period)</p> <p>TemporalBefore(the beginning of the period the day after the learning delivery's actual end date)</p>
true	<p>the learning delivery's learning actual end date is unknown and</p> <p>for at least one of the learning delivery's FAMs</p> <p>the learning delivery FAM's upper case type = "LSF" and</p> <p>the learning delivery FAM's numeric code = 1 and</p> <p>TemporalOnOrAfter(the beginning of the learning delivery FAM's from date period)</p> <p>TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)</p> <p>and</p> <p><i>the date is in the current funding year and</i></p> <p>TemporalOnOrAfter(the beginning of the learning delivery's start date period)</p>
false	otherwise

The next steps are to deal with the cases when two or more aims for the same learner are flagged with Learning Support - the ILR value 'LSF'.

Each learner only generates a maximum of one Learning Support payment per month, even if all their aims are flagged with LSF. Because all funding outputs are at aim level, a priority order is used to work out which aim should be allocated that learner's Learning Support value for that month.

The priority order for choosing which aim is allocated the funding is as follows:

- (a) Look for the highest Learning Support rate that month. An aim which has been flagged with the LSF code will be given higher priority than an aim which wasn't flagged. If two or more aims are flagged then currently they all have the same the same Learning Support rate, but this also future-proofs against scenarios when the rates might vary, in which case the highest rate would takes priority.
- (b) Previously we had logic to prioritise programme aims (for apprenticeships or traineeships) above component aims, but neither type of programme is present in FM38. Although programmes can still exist in FM38 for devolved provision we now rely on providers recording the LSF code on the correct aims; the overall funding will not change, but the aim which the calculation assigns the funding to may be different.
- (c) If previous steps have not identified a unique learning aim, find the aim with the earliest start date. This reduces cases when the Learning Support funding generated would move from one aim to another during the learner's programme.
- (d) If there are multiple aims starting on the same date (with other previous criteria equal) use the aim with the lowest sequence number in the ILR data.

Find the highest LSF rate across all of the aims which are eligible for LSF.

the learner's highest LSF rate = the learning delivery's LSF rate which is the greatest for all of the learner's learning deliveries for which it is the case that the learning delivery is eligible for LSF in the period

Flag the eligible aims which have the highest LSF rate.

the learning delivery's LSF rate is the highest priority if
the learning delivery is eligible for LSF in the period and
the learning delivery's LSF rate = the learner's highest LSF rate

Find the LSF aim type priority across all of the aims. (No criteria currently implemented here to give different outputs.)

the learning delivery's LSF aim type	
2	<i>the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim</i>
1	otherwise

Using the attribute above, find the highest LSF aim type across all of the eligible aims which have the highest LSF rate.

the learner's highest LSF aim type = the learning delivery's LSF aim type which is the greatest for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF rate is the highest priority

Flag eligible aims which have the highest LSF rate and highest LSF aim type.

the learning delivery's LSF aim type is the highest priority if

the learning delivery is eligible for LSF in the period and
the learning delivery's LSF rate is the highest priority and
the learning delivery's LSF aim type = the learner's highest LSF aim type

Find the earliest start date across all of the eligible aims which have the highest LSF rate and highest LSF aim type.

the learner's earliest LSF start date = the learning delivery's learning start date which is the earliest for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF aim type is the highest priority

Flag eligible aims which have the highest LSF rate, highest LSF aim type and earliest start date.

the learning delivery's LSF start date is the highest priority if

the learning delivery is eligible for LSF in the period and
the learning delivery's LSF aim type is the highest priority and
the learning delivery's learning start date = the learner's earliest LSF start date

Find the lowest aim sequence number among the eligible aims which have the highest LSF rate, highest LSF aim type and earliest start date.

the learner's lowest LSF aim sequence number = the learning delivery's aim sequence number which is the least for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF start date is the highest priority

Assign the funding LSF to the eligible aim, determined above. This is a temporal variable, because it depends on "the learning delivery is eligible for LSF in the period" which is also temporal.

the learning delivery's LSF cash	
the learning delivery's LSF rate	the learning delivery is eligible for LSF in the period and the learning delivery's aim sequence number = the learner's lowest LSF aim sequence number
0	otherwise

Entity Relationships

58. This document defines some inferred relationships between entities. For example it relates learning delivery entities to related LARS entities to determine funding rates.

59. Some other parent-child ("containment") relationships are implicit, automatically generated, and not defined in this document. For instance there is a relationship between every learning delivery entity and the parent learner entity.

LARS

For both of these LARS relationships, the integration code which passes the data into the rulebase will already have filtered the LARS data to only include records with a learning aim reference matching the learning aim reference in the learning delivery's ILR data.

This relationship is between a learning delivery entity and a LARS Funding rate entity which has the category, once converted to uppercase, of "ADULT_SKILLS_FUND". This is the funding rate for non-devolved provision, and for devolved provision (although a later step excludes Free Courses for Jobs) where a matching rate has not been found in the next relationship.

the learning delivery LARS funding is a member of the learning delivery's LARS Funding Adult Skills Fund funding categories if

the learning delivery LARS funding is a member of the learning delivery's LARS funding rates and
the learning delivery LARS funding's uppercase funding category is currently known and
the learning delivery LARS funding's uppercase funding category =
"ADULT_SKILLS_FUND"

This relationship is used when a devolved authority has defined a rate in LARS for a specific learning aim, and where the SOF of this learning delivery matches the SOF of that records in LARS. Matching values here are used to override the non-devolved rates which are matched in the relationship above.

the learning delivery LARS devolved funding is a member of the learning delivery's LARS devolved funding rates with matching SOF if

the learning delivery LARS devolved funding is a member of the learning delivery's LARS devolved funding rates and
the learning delivery's numeric source of funding code is currently known and
the learning delivery's numeric source of funding code is certain and
the learning delivery LARS devolved funding's source of funding is currently known and
the learning delivery's numeric source of funding code = the learning delivery LARS devolved funding's source of funding

Specialist Resource

In both cases the integration code which passes the data into the rulebase will already have filtered the postcode records to only include those with a matching UKPRN. However this data is not filtered by postcode. This approach relies on the postcode specialist resource dataset only containing a few records, as rulebases generally do not perform well with database operations such as trying to match a value from a very large data set.

There can be a number of postcode records in the postcode reference data which have a matching postcode. Logic elsewhere assembles these into a Temporal variable, and then selects the value as at the adjusted start date.

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

the provider postcode specialist resource's postcode = the learning delivery's delivery location postcode

The rulebase integration only passes postcode records into the rulebase which have the same UKPRN as the current learner. This relationship looks for the subset of those records which exist on the learning delivery's adjusted start date.

Note that this relationship does NOT match on the learning delivery's postcode; it is used later to get a count of whether any records exist at that date, regardless of whether the postcode matches

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

the learning delivery's adjusted start date is on or later than the provider postcode specialist resource's effective from date and

the learning delivery's adjusted start date is on or earlier than the provider postcode specialist resource's applicable effective to date

Disadvantage Uplift

There are two similar relationships used to calculate disadvantage uplifts. In both cases the integration code which passes the data into the rulebase will already have filtered the postcodes to only include those with a matching Postcode Prior to Enrolment in the learner's ILR data.

This first one looks for a matching Source of Funding code in the postcode reference data. This would be applicable when a devolved authority has defined a set of disadvantage factors, which would be indicated by their SOF in the data.

the learner postcode disadvantage factor is a member of the learning delivery's matching SOF disadvantage reference data if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner postcode disadvantage factor (the other learner)

one learner is the other learner

and

Number(the learner postcode disadvantage factor's source of funding code) = the learning delivery's numeric source of funding code

This second disadvantage relationship looks for a Source of Funding code =105 in the postcode reference data. This is used either because there is no value defined by the devolved authority, or for Free Courses for Jobs where the non-devolved funding rates are always used.

the learner postcode disadvantage factor is a member of the learning delivery's SOF 105 disadvantage reference data if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner postcode disadvantage factor (the other learner)

one learner is the other learner

and

the learner postcode disadvantage factor's source of funding code = "105"

Learner Employment Status

This relationship is looking for learner employment status records which have the employment status monitoring codes of OET=4, and then attempts to determine if that seems relevant to the current learning delivery entity.

This is required because the employment status records for a learner are only distinguished by date, and not directly linked to a learning delivery entity.

The logic looks for the OET=4 code to be between the start and actual end dates of the learning delivery. If we used dates **before** the learning delivery record started then a single employment record would apply to all future learning delivery records, which is not the behaviour we want. The ILR specification also states that OET=4 codes should be on or before the actual end date, which is also reflected here.

the learner employment status is a member of the learning delivery's applicable employment statuses representing job outcomes if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner employment status (the other learner)

one learner is the other learner

and

the learning delivery's learning actual end date is currently known and

the learning delivery's learning actual end date is certain and

the learner employment status's date applies is on or earlier than the learning delivery's learning actual end date and

the learner employment status's date applies is on or later than the learning delivery's learning start date and

the learner employment status represents a job outcome

Capping

For the purpose of calculating the maximum cap value, we need to look at the individual cap values for learning deliveries which may have different source of funding and therefore different policy cap values.

For this purpose, this relationship excludes any learning deliveries which are entirely outside the current funding year so that they do not influence the cap value.

the learning delivery is a member of the learner's learning deliveries within the current funding year

in the case of the learner associated with the learning delivery (one learner)

one learner is the learner

and

the learning delivery's learning start date is on or earlier than the current funding year end date and

either

the learning delivery's learning actual end date is unknown or

the learning delivery's learning actual end date is on or later than the current funding year start date

Devolved Flexibility Mapping Table

60. The following table is implemented in an Excel document in the rulebase.

61. The columns on the left of the table define the combination of conditions which must be true for that row. If those conditions are satisfied for a row, then the attributes on the right of the table are set to the values in that row. The calculation works down the rows in the table, and if conditions are satisfied for a row, any lower rows are ignored for the current learning delivery. If no conditions are satisfied for any earlier rows, the attributes are set as defined in the "otherwise" row.

62. The table allows several different output flexibilities to be defined; however the only one which we have been asked to use for the 2024 to 2025 year is the attribute: the learning delivery's devolved ESOL rate per hour.

63. The other output attribute in use is called: the learning delivery's devolved authority uplift policy code. This is not used in further calculation, but is used to identify when one of the flexibilities has been applied.

64. The top four rows in this table define cases when no flexibility is applied, for instance learning aims where the funding organisation is "ESFA" or learning aims within the level 3 adult offer, also known as Free courses for jobs. The remaining rows show scenarios where uplifts apply, specific to the funding organisation.

the learning delivery's funding organisation code	the learning delivery's applicable lookup factor date	the learning delivery's applicable lookup factor date	condition	condition	the learning delivery's devolved authority uplift factor	the learning delivery's devolved ESOL rate per hour	the learning delivery's devolved authority uplift policy code	the learning delivery's devolved policy is to apply capping	the learning delivery's devolved policy cap amount including achievement and completion stage 1	the learning delivery's devolved policy long term residential college uplift stage 1
			the learning delivery is eligible for free courses for jobs		1		None			
			the learning delivery should use the exceptional calc method for area cost and disadvantage		1		None			
ESFA					1		None			
None					1		None			
London	>= 01/08/2024		the learning delivery is an ESOL aim	the learning delivery's notional NVQ level v2 ="E"		6.9	116_0004			
GMCA	>= 01/08/2024		the learning delivery is an ESOL aim			6.39	110_0003			
				otherwise	1		"None"	FALSE		1

Devolved Completion or Achievement Mapping Table

65. This table is implemented in an Excel document in the rulebase.
66. It allows devolved authorities to specify whether earning the final 20% of the funding rate for a learning aim should be based on whether the learner achieves the learning aim, or on whether they complete the learning aim.
67. For provision where the funding organisation is ESFA, this decision also depends on whether the learning aim is funded from a procured budget or not. This condition was also included within the table to allow an authority to choose the same approach as the ESFA.

the learning delivery's funding organisation code	the learning delivery's applicable lookup factor date	the learning delivery's applicable lookup factor date	condition	the learning delivery's devolved completion or achievement policy
ESFA				"None"
None				"None"
GMCA	>= 01/08/2000			"Achievement"
LCRCA	>= 01/08/2000			"Achievement"
WMCA	>= 01/08/2000			"Achievement"
WECA	>= 01/08/2000			"Achievement"
TVCA	>= 01/08/2000			"Achievement"
CPCA	>= 01/08/2000			"Achievement"
London	>= 01/08/2000		the learning delivery is funded from a procured budget	"Achievement"
London	>= 01/08/2000		the learning delivery is not funded from a procured budget	"Completion"
NEMCA	>= 01/08/2000		the learning delivery is funded from a procured budget	"Achievement"
NEMCA	>= 01/08/2000		the learning delivery is not funded from a procured budget	"Completion"
SYMCA	>= 01/08/2000			"Achievement"
WYCA	>= 01/08/2000			"Achievement"
EMCCA	>= 01/08/2025		the learning delivery is funded from a procured budget	"Achievement"
EMCCA	>= 01/08/2025		the learning delivery is not funded from a procured budget	"Completion"
YNYCA	>= 01/08/2025		the learning delivery is funded from a procured budget	"Achievement"
YNYCA	>= 01/08/2025		the learning delivery is not funded from a procured budget	"Completion"
Cornwall	>= 01/08/2025		the learning delivery is funded from a procured budget	"Achievement"
Cornwall	>= 01/08/2025		the learning delivery is not funded from a procured budget	"Completion"
				"None"

Devolved Mapping Table: Free courses for jobs Funding line types

68. This table is implemented in an Excel document in the rulebase.

69. It allows devolved authorities to specify which funding line types the calculation should assign for learning aims which have the ILR code LDM 378 (free courses for jobs) where the learner is aged 19-23.

70. Before the 2025 to 2026 year, these 19-23 learners were all assigned one of the "Adult Skills Fund core" funding line types. From 2025 to 2026, DfE-funded learners are assigned one of the "Adult Skills Fund free courses for jobs" funding line types.

71. This mapping table allows devolved authorities to specify whether to adopt this change or to use the previous approach.

the learning delivery's funding organisation code	the learning delivery's applicable lookup factor date	the learning delivery's applicable lookup factor date	the learning delivery's devolved FCFJ 19 to 23 funding line type policy
ESFA			"None"
None			"None"
GMCA	>= 01/08/2000		"Core"
LCRCA	>= 01/08/2000		"Core"
WMCA	>= 01/08/2000		"FCFJ"
WECA	>= 01/08/2000		"FCFJ"
TVCA	>= 01/08/2000		"Core"
CPCA	>= 01/08/2000		"FCFJ"
London	>= 01/08/2000		"FCFJ"
NEMCA	>= 01/08/2000		"FCFJ"
SYMCA	>= 01/08/2000		"FCFJ"
WYCA	>= 01/08/2000		"FCFJ"
EMCCA	>= 01/08/2025		"FCFJ"
YNYCA	>= 01/08/2025		"Core"
Cornwall	>= 01/08/2025		"FCFJ"
			"None"

Interface Fields

72. This section lists inputs to, and outputs from the OPA Rulebase.

Inputs

73. Learning Delivery records, and associated records, are passed into the rulebase if Funding Model=38 or 81, and the Learner does not fail any ILR Validation Rules which are marked as Errors.

74. The different sources of data used by the rulebase, indicated by values in the "Source" column in the table below, are as follows:

- **SLD:** constant value set by the Submit learner data system when it passes data into the rulebase
- **ILR:** from ILR data file. In some cases (learner employment status OET codes) the data is transformed from the original structure.
- **LARS:** reference data from the [Learning Aim Reference Service \(LARS\)](#). Records are matched using the learning aim reference from the ILR. In some cases, there can be multiple matching records from a LARS table which will all be passed into the rulebase.
- **Org:** Reference data on organisations held within SLD, matched using the ILR UKPRN field.
For the entity: "the provider postcode specialist resource" all records are passed into the rulebase for the UKPRN; there is no filtering by postcode outside of the rulebase.
- **Postcode:** Reference data on postcodes held within SLD.
Records for Area Cost Factors are matched using the ILR delivery location postcodes, using postcode records restricted to source of funding 105.
Records for Disadvantage Factors are matched using the ILR postcode prior to enrolment, with postcode records for multiple sources of funding, except that records are excluded for source of funding 107.

Input attributes				
Entity	Attribute public name	Attribute text	Type	Source
	CurFundYear	the current funding year	text	SLD
	LARSVersion	the LARS reference data version	text	LARS
	OrgVersion	the Org reference data version	text	Org

Input attributes				
Entity	Attribute public name	Attribute text	Type	Source
	PostcodeFactorRefDataVersion	the postcode factor reference data version	text	Postcode
	UKPRN	UK provider reference number	text	ILR
the learner	DateOfBirth	the learner's date of birth	date	ILR
the learner	LearnRefNumber	the learner's learner reference number	text	ILR
the learner employment status	DateEmpStatApp	the learner employment status's date applies	date	ILR
the learner employment status	EmpStatMon_OET1	the learner employment status's OET code 1	number	ILR
the learner employment status	EmpStatMon_OET2	the learner employment status's OET code 2	number	ILR
the learner employment status	EmpStatMon_OET3	the learner employment status's OET code 3	number	ILR
the learning delivery	AddHours	the learning delivery's additional delivery hours	number	ILR
the learning delivery	AimSeqNumber	the learning delivery's aim sequence number	number	ILR
the learning delivery	AimType	the learning delivery's aim type	number	ILR
the learning delivery	CompStatus	the learning delivery's completion status	number	ILR
the learning delivery	DelLocPostCode	the learning delivery's delivery location postcode	text	ILR
the learning delivery	FundModel	the learning delivery's funding model	number	ILR
the learning delivery	LearnActEndDate	the learning delivery's learning actual end date	date	ILR
the learning delivery	LearningDeliveryGenre	the learning delivery's learning delivery genre	text	LARS
the learning delivery	LearnPlanEndDate	the learning delivery's learning planned end date	date	ILR
the learning delivery	LearnStartDate	the learning delivery's learning start date	date	ILR
the learning delivery	NotionalINVQLevelv2	the learning delivery's notional NVQ level v2	text	LARS

Input attributes				
Entity	Attribute public name	Attribute text	Type	Source
the learning delivery	OrigLearnStartDate	the learning delivery's original learning start date	date	ILR
the learning delivery	OtherFundAdj	the learning delivery's other funding adjustment	number	ILR
the learning delivery	Outcome	the learning delivery's outcome	number	ILR
the learning delivery	PriorLearnFundAdj	the learning delivery's funding adjustment for prior learning	number	ILR
the learning delivery	SectorSubjectAreaTier2	the learning delivery's sector subject area tier 2	number	LARS
the learning delivery FAM	LearnDelFAMCode	the learning delivery FAM's code	text	ILR
the learning delivery FAM	LearnDelFAMDateFrom	the learning delivery FAM's date applies from	date	ILR
the learning delivery FAM	LearnDelFAMDateTo	the learning delivery FAM's date applies to	date	ILR
the learning delivery FAM	LearnDelFAMType	the learning delivery FAM's type	text	ILR
the learning delivery LARS annual value	LARSAnnualValueBasicSkillsType	the learning delivery LARS annual value's basic skills type	number	LARS
the learning delivery LARS annual value	LARSAnnualValueEffectiveFrom	the learning delivery LARS annual value's effective from date	date	LARS
the learning delivery LARS annual value	LARSAnnualValueEffectiveTo	the learning delivery LARS annual value's effective to date	date	LARS
the learning delivery LARS category	LARSCategoryEffectiveFrom	the learning delivery LARS category's effective from date	date	LARS
the learning delivery LARS category	LARSCategoryEffectiveTo	the learning delivery LARS category's effective to date	date	LARS
the learning delivery LARS category	LARSCategoryRef	the learning delivery LARS category's category reference	number	LARS
the learning delivery LARS devolved funding	LARSDevoFundEffectiveFrom	the learning delivery LARS devolved funding's effective from date	date	LARS
the learning delivery LARS devolved funding	LARSDevoFundEffectiveTo	the learning delivery LARS devolved funding's effective to date	date	LARS

Input attributes				
Entity	Attribute public name	Attribute text	Type	Source
the learning delivery LARS devolved funding	LARSDevoFundSourceOfFunding	the learning delivery LARS devolved funding's source of funding	number	LARS
the learning delivery LARS devolved funding	LARSDevoFundSpecialistUplift	the learning delivery LARS devolved funding's specialist uplift	number	LARS
the learning delivery LARS devolved funding	LARSDevoFundUnweightedRate	the learning delivery LARS devolved funding's unweighted rate	currency	LARS
the learning delivery LARS devolved funding	LARSDevoFundWeightedRate	the learning delivery LARS devolved funding's weighted rate	currency	LARS
the learning delivery LARS funding	LARSFundAdultSkillsFundingBand	the learning delivery LARS funding's adult skills funding band	text	LARS
the learning delivery LARS funding	LARSFundEffectiveFrom	the learning delivery LARS funding's effective from date	date	LARS
the learning delivery LARS funding	LARSFundEffectiveTo	the learning delivery LARS funding's effective to date	date	LARS
the learning delivery LARS funding	LARSFundFundingCategory	the learning delivery LARS funding's funding category	text	LARS
the learning delivery LARS funding	LARSFundRateUnweighted	the learning delivery LARS funding's unweighted rate	currency	LARS
the learning delivery LARS funding	LARSFundRateWeighted	the learning delivery LARS funding's weighted rate	currency	LARS
the organisation funding	OrgFundEffectiveFrom	the organisation funding's effective from date	date	Org
the organisation funding	OrgFundEffectiveTo	the organisation funding's effective to date	date	Org
the organisation funding	OrgFundFactor	the organisation funding's funding factor	text	Org
the organisation funding	OrgFundFactorType	the organisation funding's funding factor type	text	Org
the organisation funding	OrgFundFactorValue	the organisation funding's funding factor value	text	Org
the learning delivery postcode area cost factor	PostcodeAreaCostEffectiveFrom	the learning delivery postcode area cost factor's effective from date	date	Postcode
the learning delivery postcode area cost factor	PostcodeAreaCostEffectiveTo	the learning delivery postcode area cost factor's effective to date	date	Postcode

Input attributes				
Entity	Attribute public name	Attribute text	Type	Source
the learning delivery postcode area cost factor	PostcodeAreaCostFactor	the learning delivery postcode area cost factor's area cost factor	number	Postcode
the learner postcode disadvantage factor	PostcodeDisadvantageEffectiveFrom	the learner postcode disadvantage factor's effective from	date	Postcode
the learner postcode disadvantage factor	PostcodeDisadvantageEffectiveTo	the learner postcode disadvantage factor's effective to date	date	Postcode
the learner postcode disadvantage factor	PostcodeDisadvantageFactor	the learner postcode disadvantage factor's disadvantage factor	number	Postcode
the learner postcode disadvantage factor	PostcodeDisadvantageSOFCODE	the learner postcode disadvantage factor's source of funding code	text	Postcode
the provider postcode specialist resource	PostcodeSpecResEffectiveFrom	the provider postcode specialist resource's effective from date	date	Org
the provider postcode specialist resource	PostcodeSpecResEffectiveTo	the provider postcode specialist resource's effective to date	date	Org
the provider postcode specialist resource	PostcodeSpecResPostcode	the provider postcode specialist resource's postcode	text	Org
the provider postcode specialist resource	PostcodeSpecResSpecialistResources	the provider postcode specialist resource's specialist resources	text	Org

Outputs

Output Attributes			
Entity	Attribute public name	Attribute text	Type
	RulebaseVersion	the current version of the rulebase	text
the learning delivery	Achieved	the learning delivery has been achieved	boolean
the learning delivery	AchieveElement	the learning delivery's achievement element	currency
the learning delivery	AchievePayElig	the learning delivery is eligible for an achievement payment	boolean
the learning delivery	AchievePayment	the learning delivery's achievement payment	currency
the learning delivery	AchievePayPct	the learning delivery's achievement percentage	number
the learning delivery	ActualDaysIL	the learning delivery's actual number of days in learning	number
the learning delivery	ActualNumInstalm	the learning delivery's actual instalments	number
the learning delivery	AdjLearnStartDate	the learning delivery's adjusted start date	date
the learning delivery	AgeAimStart	the learning delivery's age at start	number
the learning delivery	AimValue	the learning delivery's aim value	currency
the learning delivery	ApplicFactDate	the learning delivery's applicable lookup factor date	date
the learning delivery	ApplicLARSASFfundingBand	the learning delivery's applicable LARS ASF funding band	text
the learning delivery	ApplicUnweightFundRate	the learning delivery's applicable unweighted rate	currency
the learning delivery	ApplicWeightFundRate	the learning delivery's applicable weighted rate	currency
the learning delivery	AreaCostFactAdj	the learning delivery's adjusted area cost factor	number
the learning delivery	BalancePayment	the learning delivery's balancing payment	currency
the learning delivery	BalancePaymentUncapped	the learning delivery's uncapped balancing payment	currency
the learning delivery	BalancePct	the learning delivery's balancing percentage	number
the learning delivery	BaseValueUnweight	the learning delivery's base unweighted value	currency

Output Attributes			
Entity	Attribute public name	Attribute text	Type
the learning delivery	BaseValueUnweightPolicyUplift	the learning delivery's base unweighted rate with policy uplift	currency
the learning delivery	CapFactor	the learning delivery's cap factor	number
the learning delivery	CompletionElement	the learning delivery's completion element	currency
the learning delivery	CompletionPayElig	the learning delivery is eligible for a completion payment	boolean
the learning delivery	CompletionPayment	the learning delivery's completion payment	currency
the learning delivery	CompletionPayPct	the learning delivery's completion percentage	number
the learning delivery	DevolvedUpliftFactor	the learning delivery's devolved authority uplift factor	number
the learning delivery	DevolvedUpliftPolicyCode	the learning delivery's devolved authority uplift policy code	text
the learning delivery	DisUpApplicableSOFCode	the learning delivery's disadvantage uplift applicable SOF	text
the learning delivery	DisUpFactAdj	the learning delivery's adjusted disadvantage uplift	number
the learning delivery	EmpOutcomePay	the learning delivery's job outcome payment	currency
the learning delivery	EmpOutcomePayElig	the learning delivery is eligible for a job outcome payment	boolean
the learning delivery	EmpOutcomePct	the learning delivery's job outcome percentage	number
the learning delivery	ESOL	the learning delivery is an ESOL aim	boolean
the learning delivery	FullyFund	the learning delivery is fully funded	boolean
the learning delivery	FundLine	the learning delivery's funding line type	text
the learning delivery	FundStart	the learning delivery is a start for funding purposes	boolean
the learning delivery	InstPerPeriod	the learning delivery's number of instalments this period	number
the learning delivery	LearnDelAEBWorkPlaceAim	the learning delivery is an AEB work placement aim	boolean
the learning delivery	LearnDelApplcESOLPerHour	the learning delivery's applicable ESOL rate per hour	currency

Output Attributes			
Entity	Attribute public name	Attribute text	Type
the learning delivery	LearnDelApplicLARSDevoSpecialistUplift	the learning delivery's applicable LARS devolved specialist uplift	number
the learning delivery	LearnDelApplicLARSDevoUnweightedRate	the learning delivery's applicable LARS devolved unweighted rate	currency
the learning delivery	LearnDelApplicLARSDevoWeightedRate	the learning delivery's applicable LARS devolved weighted rate	currency
the learning delivery	LearnDelCalcMethodAchPerc	the learning delivery's calculation should use an achievement percentage	boolean
the learning delivery	LearnDelCalcMethodCompPerc	the learning delivery's calculation should use a completion percentage	boolean
the learning delivery	LearnDelCalcMethodZeroAchComp	the learning delivery should use the exceptional calc method with zero percentage for achievement or completion	boolean
the learning delivery	LearnDelCompleted	the learning delivery has been completed	boolean
the learning delivery	LearnDelDevoCompAchPolicy	the learning delivery's devolved completion or achievement policy	text
the learning delivery	LearnDelDevoESOLPerHour	the learning delivery's devolved ESOL rate per hour	currency
the learning delivery	LearnDelDevoFCFJ_19_23_FundLinePolicy	the learning delivery's devolved FCFJ 19 to 23 funding line type policy	text
the learning delivery	LearnDelEligFreeCoursesForJobs	the learning delivery is eligible for free courses for jobs	boolean
the learning delivery	LearnDelEligibleForCapping	the learning delivery is eligible for capping	boolean
the learning delivery	LearnDelExceptionalCalcAreaDisadv	the learning delivery should use the exceptional calc method for area cost and disadvantage	boolean
the learning delivery	LearnDelFundOrgCode	the learning delivery's funding organisation code	text
the learning delivery	LearnDelLARSFundRefDataSource	the learning delivery's LARS funding reference data source	text
the learning delivery	LearnSuppFund	the learning delivery is eligible for LSF in the period	boolean

Output Attributes			
Entity	Attribute public name	Attribute text	Type
the learning delivery	LearnSuppFundCash	the learning delivery's LSF cash	currency
the learning delivery	LTRCUpliftFctr	the learning delivery's LTRC uplift	number
the learning delivery	NonGovCont	the learning delivery's non-government contribution	currency
the learning delivery	OnProgPayment	the learning delivery's on-programme payment	currency
the learning delivery	OnProgPaymentUncapped	the learning delivery's uncapped on-programme cash	currency
the learning delivery	OnProgPayPct	the learning delivery's on-programme percentage	number
the learning delivery	OutstndNumOnProgInstalm	the learning delivery's outstanding instalments	number
the learning delivery	PlannedNumOnProgInstalm	the learning delivery's planned instalments	number
the learning delivery	PlannedTotalDaysIL	the learning delivery's planned number of days in learning	number
the learning delivery	PolicyUpliftCategory	the learning delivery's policy uplift category	text
the learning delivery	PolicyUpliftRate	the learning delivery's policy uplift rate	currency
the learning delivery	PropFundRemain	the learning delivery's proportion of funding remaining	number
the learning delivery	PropFundRemainAchComp	the learning delivery's proportion of funding remaining for achievement or completion	number
the learning delivery	ReservedUpliftFactor1	the learning delivery's reserved uplift factor 1	number
the learning delivery	ReservedUpliftRate2	the learning delivery's reserved uplift rate 2	number
the learning delivery	Residential	the learning delivery is residential	boolean
the learning delivery	Restart	the learning delivery is a restart	boolean
the learning delivery	SpecResUplift	the learning delivery's specialist resources uplift	number
the learning delivery	ThresholdDays	the learning delivery's threshold days	number
the learning delivery	UnWeightedRateFromESOL	the learning delivery's applicable unweighted rate from ESOL Hours	currency
the learning delivery	UnweightedRateFromLARS	the learning delivery's applicable unweighted rate from LARS	currency
the learning delivery	WeightedRateFromESOL	the learning delivery's applicable weighted rate	currency

Output Attributes			
Entity	Attribute public name	Attribute text	Type
		from ESOL Hours	
the learning delivery	WeightedRateFromLARS	the learning delivery's applicable weighted rate from LARS	currency
the learning delivery	WeightRatePolicyUplift	the learning delivery's weighted rate with policy uplift	currency
the learning delivery	WeightRateSpecRes	the learning delivery's weighted rate with specialist resources	currency



Department
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