

Adult Education Funding

**FUNDING AND PERFORMANCE MANAGEMENT RULES
2023/2024**

**(For the funding year
1 August 2023 to 31 July 2024)**

This document sets out the funding rules that apply to all providers of education and training who receive adult education budget funding for learners residing in the West of England Combined Authority area.

Version 3

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Introduction and purpose of the document

1. This document sets out the West of England Combined Authority Adult Education Budget (AEB) funding rules for the 2023 to 2024 funding year (1 August 2023 to 31 July 2024). The rules apply to all providers of education and training who receive Adult Education funding from the Secretary of State for Education, acting through the Combined Authority, for West of England Combined Authority residents.
2. AEB aims to engage adults and provide the skills and learning they need to progress into, or within, work, or equip them for an apprenticeship or other learning. It enables more flexible tailored programmes of learning to be made available, which may or may not require a qualification, to help eligible adult learners engage in learning, build confidence, and/or enhance their wellbeing.
3. These rules do not apply to education and training services funded by the Education and Skills Funding Agency (ESFA), including apprenticeships, traineeships, advanced learner loans, skills bootcamps and Multiply, or to education and training services funded by the European Social Fund (ESF) / HMT Guarantee, for West of England Combined Authority learners.
4. This document forms part of the terms and conditions of funding and you must read them in conjunction with your funding agreement. You must operate within the terms and conditions of the funding agreement, these rules, and the Individualised Learner Record (ILR) Specification. If you do not, you are in breach of your funding agreement with the Combined Authority.
5. All information, including any hyperlinks, were correct when the Combined Authority published this document.
6. The Combined Authority reserves the right to make changes to these rules. Any updated policies and rules will be published on the Adult Education Budget website.

How this document can help you

7. This document is divided into three sections containing general funding requirements, AEB specific funding rules and payment and performance management rules. Each section may include:
 - the context of the rule in a box, and/or
 - the rule itself as a numbered paragraph
8. We have included a glossary to explain technical terms.
9. We have included a summary of main changes to explain new policy rules or any other significant amendments that differ from 2022 to 2023. If any changes are made to this document in-year, we will update the summary of main changes accordingly.

Understanding the terminology

10. The term ‘we’ refers to The West of England Combined Authority.
11. When we refer to ‘you’ or ‘providers’, this includes colleges, training organisations, local authorities and employers who receive funding from us to deliver adult education and training to West of England residents. We will use the generic term ‘you’ or ‘provider’ unless the requirements only apply to a specific provider type.
12. We use the term ‘funding agreement’ to include the Combined Authority Conditions of Funding and Grant Funding Agreement.
13. We use the terms ‘individual’ and ‘learner’ to cover those whose provision is funded by us.
14. We use the term ‘provision’ or ‘learning’ to refer to all adult learning that we fund, whether it is a regulated qualification or other learning.

15. If we refer to qualifications, either these will be from the Regulated Qualifications Framework (RQF) or an Access to Higher Education Diploma recognised and regulated by the Quality Assurance Agency (QAA).
16. If we refer to 'learning aims', we mean a single episode of learning, which could be a regulated qualification, a component of a regulated qualification, or non-regulated learning.
17. If we refer to 'programmes' we mean a coherent package of adult learning which may include regulated qualifications, components of regulated qualifications or non-regulated learning with clearly stated aims supporting agreed outcomes.
18. We may refer to this document as 'funding rules' or 'the rules'.

Contacting us

19. You can contact us via email at: adulthoodeducation@westofengland-ca.gov.uk
20. You can also contact your Combined Authority AEB Relationship Manager.

Section 1 - General funding requirements

Principles of funding

21. These funding rules apply to all learners residing in West of England Combined Authority area starting new learning aims on or after 1 August 2023, or those continuing learners who meet the criteria as referenced in the 'we will fund' section, who are undertaking learning with a contracted provider (including their subcontractors).
22. You must not transfer funding between the following budgets:
 - AEB funding received from devolved budgets to combined authorities, including transferring between different combined authorities
 - ESFA funded AEB
 - 19 to 24 continuing traineeship programmes

- level 3 free courses for jobs (FCFJ)
 - apprenticeships
 - advanced learner loans bursary fund
 - advanced learner loan facility
 - skills bootcamps
 - multiply
23. The West of England Combined Authority Adult Education Budget must only be utilised to support the delivery of Adult Education to West of England Combined Authority residents. It may not be used for any other purpose, including to subsidise the delivery of other programmes.
24. We will continually review and monitor the education and training you provide to confirm it is delivering outcomes as detailed and agreed by the Combined Authority within your 2023/24 Curriculum and Delivery Plan.
25. We will also monitor your performance to ensure that funding received from the Combined Authority is delivering high quality provision for adults in the West of England and represents good value for money. Regular performance monitoring meetings between provider and the Combined Authority will be completed throughout the funding agreement period. Further detail of these meetings and evaluation activities are included within the Combined Authority 2023/24 Provider Performance Management Framework.
26. If we consider that the funding of education and training you have provided is not delivering positive outcomes for adults in the West of England and/or the quality of provision is not to the required standard and/or, where applicable, is significantly more than the cost of providing education and training, we may reduce the amount of funding we pay after we have investigated the matter and offered you an opportunity to respond. Please see the Combined Authority Performance Management Framework 2023/24 for further information.

We will fund

27. Individuals normally resident in the West of England Combined Authority area, undertaking the Combined Authority funded AEB.
28. You must check the eligibility of the learner, including their residency eligibility, at the start of each learning aim and only claim funding for eligible learners. The DfE's devolution [postcode checker data set](#), showing the funding bodies responsible for funding each postcode in England, can be utilised to confirm whether the learner is eligible.

29. To be funded by us, on the first day of learning a learner must be aged 19 or older on 31 August 2023 and normally reside at a location within the West of England. This refers to a person's primary residence being within the West of England region, rather than living in temporary accommodation for the duration of their course.
30. The age of the learner on 31 August in the funding year determines whether the learner is eligible for funding through the Combined Authority's Adult Education Funding methodology. Learners aged 18 or below, aged 19 to 24 with an Education, Health and Care Plan (EHCP) or aged 19 or over and continuing a programme they began aged 16 to 18, will continue to be funded by the ESFA's 16 to 19-year-olds funding methodology.
31. Where we refer to a learner's age being 19, this relates to the learner being aged 19 on the 31 August within the funding year they start a learning aim. For all other purposes, the age of the learner is at the start of each learning aim.
32. The eligibility of a learner is judged on their Actual Start Date (not the qualifying date for funding) of each learning aim undertaken. If a learner's circumstances change between start dates of individual learning aims, the learner's eligibility may also change. You should therefore confirm the eligibility of learners for each individual learning aim undertaken.
33. Learners will be eligible for funding for the whole of the learning aim if they are eligible for funding at the start, even if the duration is for over one year or if their circumstances change.
34. If an individual starts a learning aim and is not eligible for funding at the start, we will not fund their learning.
35. You must not fund a learner who is unable to complete a learning aim in the time they have available.

Residency eligibility

36. Individuals will be eligible for Combined Authority funded AEB if they meet the criteria in the 'We Will Fund' section, paragraph 27 - 35, the learning is taking place in England, and they fulfil the residency requirements set out in one or more of the categories below.

37. Unless otherwise stated, individuals must be ordinarily resident in the UK on the first day of learning to meet the residency requirements.

Temporary residence in the UK for educational purposes

38. People who have been resident in the UK solely for the purposes of receiving full-time education would not be deemed ordinarily resident in the UK and are therefore not eligible for funding unless they meet another eligibility criteria.

Temporary absences from the UK

39. Learners who are temporarily outside of the UK for reasons such as education, employment or a gap year, but remain settled in the UK, should be considered ordinarily resident in the UK.
40. British armed forces, MoD personnel or civil crown servants on postings outside of the UK, or people who are resident in England but work outside England, can also be treated as ordinarily resident in the UK.
41. If someone ordinarily resident in the West of England works outside of England as part of their job, they are eligible for funding as long as some of the learning takes place in England. You cannot claim for the additional expense of delivering learning outside of England.

Learners who have applied for an extension or variation of current immigration permission

42. Any person who has applied for an extension or variation of their current immigration permission in the UK is still treated as if they have that leave. This only applies if the application was made before their current permission expired. Their leave continues until the Home Office decide on their immigration application. Their leave will continue where they have appealed or sought an administrative review of their case within the time allowed to them for doing so.
43. Therefore, a person is considered to still have the immigration permission that they held when they made their application for an extension, administrative review or appeal, and their eligibility would be based upon this status.
44. The learner's immigration permission in the UK may have a 'no recourse to public funds' condition. Public funds do not include education or education

funding. Therefore, this does not affect a learner's eligibility, which must be decided under the normal eligibility conditions.

Categories of residency eligibility

45. Learners will have an eligible residency status if they meet the conditions laid out in one of the following sections:

UK nationals and other persons with right of abode

46. UK nationals or other person with a right of abode¹ who have been ordinarily resident in the UK, Republic of Ireland, the British Overseas Territories (listed in Annex A), or the Crown Dependencies (Channel Islands and Isle of Man) for at least the previous 3 years on the first day of learning.

47. Family members of UK nationals are not eligible for AEB funding unless they:

- meet the residency requirements in their own right, or
- fall under the categories described in the 'UK nationals in the EEA and Switzerland' section, or
- fall under the categories described in the 'Family members of an eligible person of Northern Ireland' section

UK nationals in the EEA and Switzerland

48. UK nationals have an eligible residency status if they:

- resided in the EEA, Switzerland, EU overseas territories or Gibraltar by 31 December 2020 (or resident in the UK, having moved to the UK from the EEA, Switzerland, EU overseas territories or Gibraltar after 31 December 2017), and
- resided in the EEA, Switzerland, EU overseas territories or Gibraltar, Gibraltar, or the UK for at least the previous 3 years on the first day of learning, and
- remained ordinarily resident in the UK, Gibraltar, the EEA, Switzerland or EU overseas territories between 31 December 2020 and the start of the course and
- the course starting before January 2028²

¹ Persons with the right of abode have the right to live and work in the UK without any immigration restrictions. Further details can be found here: [Prove you have right of abode in the UK](#)

² This refers to the 7-year offer for UK nationals in EEA and Switzerland. More info on the 7-year offer can be found here: [UK nationals in the EEA and Switzerland: access to higher education and 19+ further education.](#)

49. Family members of UK nationals have an eligible residency status if:
- both the UK national and the family member resided in the EEA, Switzerland or EU Overseas Territories by 31 December 2020 (or resided in the UK, having moved there from the EEA, Switzerland or EU Overseas Territories after 31 December 2017), and
 - both the UK national and the family member remained ordinarily resident in the UK, the EEA, Switzerland or EU Overseas Territories between 31 December 2020 and the start of the course, and
 - the UK national to whom they are a family member has been ordinarily resident in the UK, EEA, Switzerland or EU Overseas Territories for at least 3 years on the first day of the first academic year of the course and
 - the course starts before January 2028
50. A “family member” for these purposes is either:
- the spouse / civil partner of the UK national (principal) or
 - the child or grandchild of the principal and/or their spouse / civil partner, who is either under 21 or dependent on the principal and/or their spouse / civil partner

51. Countries and territories within the EEA are listed in annex A.

EEA and Switzerland nationals in the UK with EU Settlement Scheme

52. EEA and Switzerland nationals who:
- have obtained either pre-settled or settled status under EUSS and
 - have lived continuously in the EEA, Switzerland, Gibraltar, or the UK for at least the previous 3 years on the first day of learning.
53. Countries and territories within the EEA are listed in annex A.
54. Although the deadline for most people to apply to EUSS was 30 June 2021, there may be individuals who have reasonable grounds for making a late application, or who have made an application on time but are still waiting on a final decision on their EUSS status from the Home Office, including those that have lodged an appeal. Once a valid application has been made to EUSS (evidenced by receipt of a certificate of application), the applicant will have temporary protection, pending the outcome of that application.

EEA and Switzerland frontier workers

55. An EEA or Switzerland frontier worker is someone who is employed or self-employed in the UK who resides in the EEA or Switzerland, and returns to that residence in the EEA or Switzerland at least once a week.
56. Frontier workers, and their family members, have an eligible residency status if they have been ordinarily resident in the UK, EEA and/or Switzerland for at least the previous 3 years on the first day of learning.
57. A “family member” of an EEA frontier worker for these purposes is either:
- the spouse / civil partner of the EEA frontier worker (principal) or
 - the child or grandchild of the principal and/or their spouse / civil partner, who is either under 21 or dependent on the principal and/or their spouse / civil partner, or
 - dependent parents or grandparents of the principal and/or their spouse / civil partner
58. A “family member” of a Swiss frontier worker for these purposes is either:
- the spouse / civil partner of the Swiss frontier worker (principal) or
 - the child of the principal and/or their spouse / civil partner
59. Unlike other categories, a frontier worker or their eligible family member **does not** have to be resident in the UK on the first day of learning in order to have an eligible residency status.

Family members of EU nationals

60. A family member of an EU national is eligible for funding if:
- where required to do so, they have obtained pre-settled or settled status under EUSS and
 - the EU national (principal) has obtained pre-settled or settled status under EUSS and has been ordinarily resident in the UK, EEA and/or Switzerland for at least the previous 3 years on the first day of learning
61. Family members of an EEA or Swiss national can apply to EUSS after 30 June 2021 if they are joining them in the UK on or after 1 April 2021 and have 3 months to do so from the date they arrive in the UK. They will have temporary protection and therefore be eligible for funding during those 3 months, pending the outcome of any EUSS application made during that period (and of any appeal). More information on applying to join a family member in the UK can be found on GOV.UK.

62. A “family member” for these purposes is either:

- the spouse / civil partner of the EU national (principal) or
- the child or grandchild of the principal and/or their spouse / civil partner, who is either under 21 or dependent on the principal and/or their spouse / civil partner
- the dependent parent or grandparent of the principal or of the principal’s spouse / civil partner

Irish citizens in UK or Republic of Ireland

63. Irish citizens in the UK or Republic of Ireland who:

- have been ordinarily resident in the UK and Islands, and/or Republic of Ireland for at least the previous 3 years on the first day of learning.

Irish citizens in EEA and Switzerland

64. Irish citizens who:

- resided in the EEA or Switzerland by 31 December 2020 (or resident in the UK, having moved to the UK from EEA or Switzerland after 31 December 2017), and
- resided in the EEA, Switzerland, Gibraltar, or the UK for at least the previous 3 years on the first day of learning and
- remained ordinarily resident in the UK, Gibraltar, the EEA or Switzerland between 31 December 2020 and the start of the course and
- the course starting before January 2028

65. Countries and territories within the EEA are listed in annex A.

Other non-UK nationals

66. Non-UK nationals who:

- Have been ordinarily resident in the UK and Islands for at least the previous 3 years on the first day of learning and
 - have permission granted by the UK government to live in the UK and such permission is not for educational purposes only, or
 - have obtained pre-settled or settled status under EUSS

Family members of an eligible person of Northern Ireland

67. Family members of an eligible person of Northern Ireland³ (principal) are eligible for funding if:
- they have been living in the UK by 31 December 2020, and
 - they have obtained pre-settled or settled status under EUSS, and
 - the eligible person of Northern Ireland (principal) has been ordinarily resident in the UK by 31 December 2020, for at least the previous 3 years on the first day of learning
68. A “family member” for these purposes is either:
- the spouse / civil partner of person of Northern Ireland (principal) or
 - the child or grandchild of the principal and/or their spouse / civil partner, who is either under 21 or dependent on the principal and/or their spouse / civil partner or
 - the dependent parent or grandparent of the principal or of the principal’s spouse / civil partner

Long residence

69. A person who, on the first day of learning, has lived in the UK either half their life or a period of 20 years or more, has an eligible residency status.
70. Learners may be able to prove this status via a confirmed entry date from Immigration Control, verified by the Home Office.
71. Alternatively, they may provide evidence that they have been living in the UK for the period in question, ideally be from an official and independent source. Examples could include:
- A signed letter on headed paper from someone in a leadership position at the school they attended, or
 - a letter from their GP, or
 - wage slips or a P45/P60
72. Provider’s funding learners under this category should obtain enough evidence to assure themselves beyond reasonable doubt that the learner was living in the UK for the necessary period.

³ Further information can be found here: [Apply for an EU Settlement Scheme family permit to join family in the UK: Apply if you’re joining a person of Northern Ireland.](#)

Individuals with certain types of immigration status and their family members

73. Any individual with any of the statuses listed below, or leave under the listed schemes, is eligible to receive funding and is exempt from the 3-year residency requirement rule:

- Discretionary leave to enter or remain
- Exceptional leave to enter or remain
- Indefinite leave to enter or remain⁴
- Humanitarian protection
- Refugee status
- Leave outside the rules
- Individuals with leave to enter or remain in the UK under one of the Ukraine schemes:
 - Ukraine Family Scheme
 - Ukraine Sponsorship Scheme (Homes for Ukraine)
 - Ukraine Extension Scheme
- The spouse / civil partner, or child of any of the above in the first 7 bullet points in this list
- Section 67 of the Immigration Act 2016 leave⁵
- Calais leave to remain⁶
- Persons granted leave under one of the Afghan schemes:
 - Individuals with leave to enter or remain in the UK under the Afghan Citizens Resettlement Scheme (ACRS)
 - Individuals with leave to enter or remain in the UK under the Afghan Relocations and Assistance Policy (ARAP)
 - British Nationals evacuated from Afghanistan under Operation Pitting
 - British Nationals evacuated from Afghanistan by the UK government before 6 January 2022

74. In relation to the above categories, you must have seen the learner's immigration permission. This would include the biometric residence permit (BRP) and in some cases an accompanying letter from the Home Office.

⁴ This includes Afghans eligible under the Afghan Relocation and Assistance policy (formally known as Locally Engaged Staff under the intimidation policy)

⁵ A child of a person who has received leave under section 67 of the Immigration Act 2016 will come under this bullet point where they have been granted "leave in line" by virtue of being a dependent child of such a person

⁶ A child of a person who has received Calais leave to remain will come under this bullet point where they have been granted "leave in line" by virtue of being a dependent child of such a person

Persons granted stateless leave

75. A person granted stateless leave is a person who has extant leave to remain as a stateless person under the immigration rules (within the meaning given in section 33(1) of the Immigration Act 1971).
76. A person granted stateless leave is eligible for funding if they have been ordinarily resident in the UK and Islands throughout the period since they were granted such leave.
77. Certain family members are also eligible under this category:
- the spouse / civil partner of a person granted stateless leave who was the spouse / civil partner of that person on the leave application date and have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK.; or
 - the child of a stateless person or of the stateless person's spouse / civil partner who was the child of that stateless person or the child of the stateless person's spouse / civil partner on the leave application date, was under 18 on the leave application date, and have been ordinarily resident in the UK since they were given leave to enter or remain.
78. "Leave application date" means the date on which a person granted stateless leave made an application to remain in the UK as a stateless person under the immigration rules (within the meaning given in section 33(1) of the Immigration Act 1971).

Children of Turkish Workers

79. A child of a Turkish worker is eligible if both the following apply:
- the Turkish worker is ordinarily resident in the UK on or before 31 December 2020 and has Turkish European Community Association Agreement (ECAA) rights or extended ECAA leave and
 - the child has been ordinarily resident in the UK, EEA and/or Turkey for at least the previous 3 years on the first day of learning and is resident in the UK on or before 31 December 2020

Asylum Seekers

80. Asylum seekers are eligible to receive funding if:
- they have lived in the UK for 6 months or longer while their claim is being considered by the Home Office, and no decision on their claim has been made, or

- they are receiving Local Authority support under section 23C or section 23CA of the Children Act 1989 or the Care Act 2014.

81. An individual who has been refused asylum will be eligible if:

- they have appealed against a decision made by the UK government against granting refugee status and no decision has been made within 6 months of lodging the appeal; or,
- they are granted support for themselves under section 4 of the Immigration and Asylum Act 1999; or,
- they are receiving local authority support for themselves under section 23C or section 23CA of the Children Act 1989

Individuals who are not eligible for funding

82. You must not claim Combined Authority funding for individuals who do not meet the criteria set out above. Examples of individuals who do not meet the eligibility criteria include, but is not limited to, the following:

- those who are resident in other areas outside of the West of England Combined Authority as defined by their residential postcode
- those who are here without authority or lawful status
- those who are resident in the UK on a student visa unless they are eligible through meeting any other of the categories described above
- those who are in the UK on holiday, with or without a visa
- any family member of a person granted a student visa, who have been given immigration permission to stay in the UK and have not been ordinarily resident in the UK for the previous 3 years on the first day of learning
- those whose biometric residence permit or residence permit imposes a study prohibition or restriction on the individual

Learners in the armed forces

83. We will fund armed forces personnel, Ministry of Defence (MoD) personnel or civil and crown servants where they are residents within the West of England Combined Authority area. We will class members of the British armed forces on postings outside of the European Union (EU), including their family members, as ordinarily resident in the West of England.

84. Members of other nations' armed forces stationed in the West of England, and their family members, aged 19 and over, are eligible for funding if the armed forces individual has been ordinarily resident in England for 3 years. We will not fund family members that remain outside of the West of England.

Fees and charging

85. You must not make compulsory charges relating to the direct costs of delivering a learning aim or programme to learners we fully fund, including those with a statutory entitlement to full funding for their learning. Direct costs include any essential activities or materials without which the learner could not complete and achieve their learning.
86. If a fully funded learner needs a Disclosure and Barring Service (DBS) check to participate in learning, you cannot charge them for this. If the learning is associated with the learner's employment, their employer is responsible for carrying out and paying for this check.
87. When charging co-funded learners, the sum of the government contribution and the learner's fee must not exceed the fully funded weighted rate for the learning aim. The learner should not have to pay more than 50% of the unweighted rate.

Collection of the co-funded element

88. Providers are expected to collect all co-funded fee income to which they are entitled. In exceptional circumstances, they may opt to waive their right to collect fees from priority learners (e.g. where a genuine and evidenced inability to pay would prevent a learner from participating and thereby place them at significant disadvantage). Where this occurs, the provider should maintain a record of all waived fee income and the associated justification on an individual learner level.
89. The providers right to waive potential fee income is granted on condition that the loss of this income does not have a detrimental impact on any provision delivered by the provider. This right relates exclusively to learners and does not extend to employers (see below). Fees waived should be recorded using DAM code DAM045, please refer to [technical note](#) for further information.

Co-funded fee income in the workplace

90. Where, under flexibilities introduced by the Combined Authority, a co-funded learning aim is undertaken by an employee as part of their employment, the co-funded fee should be paid by the employer and not the employee.
91. The right to waive potential fee income detailed above does not extend to co-funding fees for which the employer is liable. The provider may however allow the employer to pay the required co-funding contribution 'in-kind' in the form

of an equivalent volume of work experience placements to be made available to all Combined Authority AEB funded learners:

Total co-funding contribution required	Duration of commensurate work experience placement
£1 - £21	4 hours
£22 - £34	6 hours
£35 - £50	12 hours
£51 - £100	20 hours
£101 - £150	44 hours
£151 - £300	68 hours
£301 - £450	92 hours
£451 - £600	100 hours
£601 - £724	196 hours
£725 - £1,265	292 hours

92. For the co-funding requirement to be satisfied, the work experience placement must be both offered and utilised. Utilisation of the placement is not restricted to the provider offering the co-funded provision and may be utilised by any provider in support of the Combined Authority adult education provision. We will also consider utilisation by other programmes which support the Combined Authority residents on request.

Qualifying days for funding

93. A learner must be in learning for a minimum number of days between their learning start date and learning planned end date before you can earn funding, including learning support. This does not apply where the learner achieves the learning aim. For further information, please refer to the [Combined Authority Adult Education Budget Funding Rates and Formula 2023/24](#) on the [West of England Combined Authority website](#).

Recognition of prior learning (RPL)

94. A learner could have prior learning or attainment that has been previously accredited by an awarding organisation or could be formally recognised and count towards achievement of a qualification. If this is the case, you must:
- 94.1. reduce the funding amount claimed for the qualification aim by the percentage of learning the learner does not need
 - 94.2. follow the policies and procedures set by the awarding organisation in regard to recognition of prior learning, including any restrictions concerning where RPL or prior attainment may not be applied

- 94.3. ensure you have a robust internal RPL policy and appropriate resources to deliver RPL
95. We would not expect RPL or prior attainment to be used against the whole qualification, this is exemption rather than RPL.
96. You must not use prior learning to reduce funding for:
- English and maths qualifications up to and including level 2
 - essential digital skills qualifications up to and including level 1
97. If a learner enrolls on an advanced subsidiary (AS) level qualification followed by an A Level, you must reduce the funding claimed for the A Level to take account of prior study of the AS level and record this in the ‘funding adjustment for prior learning’ field in the ILR. More information is available in [ESFA ILR](#) guidance.

Breaks in learning

98. You and the learner can agree to suspend learning while the learner takes a break from learning, allowing the learner to continue learning with the same eligibility that applied when they first started. Typical break reasons include; for economic reasons, long term sickness, maternity leave, or religious trips.
99. Breaks in learning must not be used to ‘suspend’ learning where contact is lost, the learner’s attendance or progress within the programme is poor, or for short-term absences, such as holidays or short-term illness.
100. We will not fund a learner during a break in learning.
101. You must record the date a learner starts a break in learning and the date they restart their learning in the ILR. Further guidance on recording breaks can be found in the [ILR provider support manual 2023 to 2024](#).
102. You must have evidence the learner agrees to return and continue with the same learning aim, otherwise you must report the learner as withdrawn. When the learner returns to learning, you must re-plan and extend remaining delivery as required.

What we will not fund

103. Any learning that is not eligible for funding before the learner starts. [Find a learning aim](#) contains details of eligible regulated qualifications, qualification components and non-regulated learning aims, and can be used to make sure that any learning is eligible.

104. Provision to learners in custody, as the Ministry of Justice funds prison education in England. You can, however, use the Combined Authority funded AEB to fund individuals released on temporary licence.
105. Any part of a learner’s learning aim or programme that duplicates provision they have received from any other source.
106. Provision that is ESF, advanced learner loans, apprenticeships, or traineeships.
 - 106.1. This includes where a learner is undertaking or planning to undertake an apprenticeship and where that training will:
 - 106.1.1. replicate vocational and other learning aims covered by the apprenticeship standard or framework, including English and maths
 - 106.1.2. offer career related training that conflicts with the apprenticeship aims
 - 106.1.3. be taking place during the apprentice’s working hours of the job the apprenticeship is linked to
 - 106.2. This also includes end-point assessment outside of apprenticeship standards, which is subject to Ofqual external quality assurance and regulated as a qualification
107. Repetition of the same regulated qualification by a learner where they have previously achieved it unless it is for any GCSE where the learner has not yet achieved grade 4 (C) or higher.
108. The sitting or resitting of a learning aim assessment or examination by a learner where no extra learning takes place.
109. Any unplanned carry over learners in the current year where the provider has already received all the funding associated with the learner in 22/23 and you were successful in securing payment protection for funding year 2022/23, as this would be classed as double funding.

Third Party Delivery (Subcontracting)

110. Information on subcontracting funding rules that apply to all providers of education and training who receive AEB is available in the Third Party Delivery Rules, published separately on the [Combined Authority Website](#).

Match Funding

111. The Combined Authority will not directly match fund any ESF projects with AEB funding. Providers may not utilise Combined Authority AEB funding as match funding for any source of funding without our prior agreement.

Evidence

112. You must hold evidence to assure us that you are using the Combined Authority Adult Education Funding appropriately. Most evidence will occur naturally from your normal business processes.
113. You must make sure enrolment for Combined Authority funded AEB support your decision to claim funding and support the individual's case for consideration as ordinarily resident in England, or any exceptions set out in the 'Residency Eligibility' section.
114. In line with General Data Protection Regulations (GDPR), you must record in the evidence pack what appropriate documentation you have seen, rather than take photocopies to prove eligibility.

Evidence Pack

115. The evidence pack must contain evidence to support the Combined Authority Adult Education Funding claimed, including evidence to assure us that the learner exists, and must be available to us if we need it. The learner must confirm that the information they provide is correct when it is collected.
116. The level of evidence in the evidence pack is expected to reflect the time spent in learning. For example, if the time spent in learning is short, we would expect less evidence to be in the evidence pack than we would expect for an aim undertaken over an extended period.
117. All paper files for the evidence pack should also be available electronically. Where you hold information centrally, you only need to refer to the source.
118. You must keep evidence that the learner is eligible for funding. If applicable, the evidence pack must confirm or include the following:
- 118.1. All information reported to the ESFA in the ILR for West of England residents and reported directly to the Combined Authority through the Monthly Claim Report, and all supporting evidence to substantiate the data that you report for each learner

- 118.2. Your assessment and verified evidence of eligibility for funding, and a record of what evidence the learner provided in support of this
 - 118.3. Copies of all assessments and diagnostics undertaken to determine a learner's requirements
 - 118.4. Evidence and information on prior learning that affects the learning or the funding of any of the learning aims or programme
 - 118.5. For 'personalised learning programmes', e.g. non-regulated learning aims, full details of all the aspects of the learning to be carried out, including supporting evidence of the planned hours reported in the ILR
 - 118.6. A description of how you will deliver the learning and skills and how the learner will achieve, typically including a timetable / scheme of work which details planned hours.
 - 118.7. Supporting evidence about why you have claimed funding and the level of funding for a learner, including details of any learner or employer contribution.
 - 118.8. Support needs identified, including how you will meet these needs and the evidence of that.
 - 118.9. That learning is taking or has taken place and records are available, typically in the form of an attendance sheet, register or similar.
 - 118.10. A learner's self-declaration as to what state benefit(s) they claim.
 - 118.11. A learner's self-declaration on their status relating to gaining a job.
 - 118.12. All records and evidence of achievement of learning aims. This must be available within 3 months of you reporting it in the ILR.
119. Where the learner is unemployed, this must include a record of what you have agreed with them, including the relevance of the learning to their employment prospects and the labour market needs.
120. If a third-party delivers any provision to the learner, it must clearly identify who it is, and this must match the information reported in the ILR.

Confirmation and signatures

121. The learner or, where applicable, the employer must confirm the information is correct when it is collected. You must have evidence of this, which can include electronic formats. However, where evidence is electronic, you must have wider systems and processes in place to assure you that learners exist and are eligible for funding.

122. Both electronic and digital signatures are acceptable forms of electronic evidence. We do not specify which should be used, only that a secure process to obtain and store signatures is followed.
- An electronic signature is defined as any electronic symbol or process that is associated with any record or document where there is an intention to sign the document by any party involved and can be anything from a check box to a signature.
 - A digital signature is where a document with an electronic signature is secured by a process making it non-refutable and is a digital fingerprint which captures the act of signing by applying security to a document. Usually documents which have a digital signature embedded are extremely secure and cannot be accessed or amended easily.
123. Where an electronic or digital signature is being held, from any party for any reason, you must ensure it is non-refutable, including the definitions of both wet and dry signatures.
124. Systems and processes must be in place to assure to us the original signature has not been altered. Where any document needs to be renewed, and a new signature taken, it must be clear from when the new document takes effect, and both must be held.
125. You must keep effective and reliable evidence. You are responsible for making the evidence you hold easily available to us when we need it.

Starting, participating, and achieving

126. You can only claim Combined Authority Adult Education Funding when directly related learning starts. This would not include enrolment, induction, prior assessment, diagnostic testing, or similar activities, other than within the context of specific learning aims created by the Combined Authority to support the enhanced CEIAG / IA of priority learners. Where such aims are utilised, the level of assessment offered should be in addition to the level that you would normally offer, and these aims may not be used to replace normal assessment that all providers are expected to undertake in relation to all learners.
127. For your direct delivery, and any third-party delivery, you and where relevant, your third-party(ies) must have direct centre approval and where appropriate, direct qualification approval from the respective awarding organisation for the regulated qualifications you are offering.

128. Delivery of the qualification (including learner registration with the awarding organisation) for direct delivery and any third-party delivery must be in line with the qualification specification and guidance set out by the relevant awarding organisation.
129. You must have evidence that the learning took place, and the learner was not certificated for prior knowledge.
130. Where learning is certificated, you must follow your awarding organisation's procedure for claiming the relevant certificate(s) and ensure the learner receives them, and you must evidence this has happened in the evidence pack.

Leaving Learning

131. You must report the learning actual end date in the ILR for a learner who leaves learning as the last day that you can evidence, they took part in a learning activity.
132. This must be recorded within 2 months of the actual end date.

Expectations for a Programme of Adult Education

133. The Provision funded through the Provider's GFA is defined as the delivery of programmes of learning and support to adult learners in accordance with this GFA and the associated funding rules and policy documents.
134. The Combined Authority expects the programmes of learning and support delivered under this GFA to include the following components:
 - Career Education Information, Advice and Guidance (CEIAG)
 - Initial Assessment (IA) / Diagnostic Testing
 - Teaching and assessment of a regulated or unregulated learning aim, or aims as part of a wider programme
 - Progress Review
 - Progression Support
135. In addition, learners should be provided with the following where eligible and a need is identified through CEIAG, IA or Progress Review:
 - Learner Support
 - Learning Support
 - Literacy / Numeracy / ESOL / Digital support
 - Work Experience

- Enhanced CEIAG & IA for Adult Skills funded priority learners, to be funded through the enhanced learning aims.

Individualised Learner Record (ILR)

136. You must accurately complete all ILR fields as required in the [2023 to 2024 ILR specification](#), even if they are not required for funding purposes.
137. The ESFA ILR must accurately reflect the learning and support (where applicable) you have identified, planned, and delivered to eligible West of England residents. You must not report inaccurate information that could result in an inflated claim for funding.
138. Where your data does not support the funding claimed, we will take action to correct this, and we could recover funds you overstated.

Combined Authority Monthly Claim Report

139. You must submit a Monthly Claim Report directly to the Combined Authority in addition to your ILR return. The Combined Authority Monthly Claim Report is to be updated on a monthly basis, the exact timings of which will be communicated in the proforma 2324 Monthly Claim Report.

Priority Residents

140. As part of our efforts to simplify West of England Combined Authority Adult Education Budget delivery, for the funding year 2023/24 we have removed the categories of adult education utilised in previous years. Instead, we have allocated funds in five separate elements structured around areas of priority as well as ring-fenced budgets.
141. These five elements, in order of precedence, are defined as follows:
 - National Skills Fund Level 3 Entitlement / Free Courses for Jobs
 - Green Skills
 - Unemployed Priority Residents
 - Employed Priority Residents
 - Low Priority Residents / Provision
142. Per the order of precedence, funding will be considered aligned with the **first** of the five elements which is applicable to a particular learner. For example, if a learner met the eligibility criteria for both Green Skills and

Unemployed Priority Residents, this learner and their associated funding would be classified as Green Skills only for monitoring purposes.

National Skills Fund Level 3 Entitlement / Free Courses for Jobs

143. Provision which is fundable under National Skills Fund Level 3 Entitlement / Free Courses for Jobs is defined by national government. This includes increased local flexibility from 1st April 2023.

Green Skills

144. At present, the Combined Authority does not have any mechanisms through which Green Skills provision may be accurately identified. Given this, we are currently unable to quantify the extent to which existing provision supports the green agenda. We will therefore use the 2023/24 academic year to establish a baseline by asking providers to identify all provision that satisfies the following definitions via the ILR:

- Primary Green: The primary purpose of the course is to equip learners with the knowledge, skills, experience and attitudes needed to support a fair transition towards an increasingly sustainable economy and society, in particular accelerating progress towards net-zero.
- Secondary Green: The course offers a reasonable contribution towards equipping learners with the knowledge, skills, experience, and attitudes needed to support a fair transition towards an increasingly sustainable economy and society, in particular accelerating progress towards net-zero, but this is not the primary purpose of the course.

Unemployed Priority Residents

145. Individuals who are unemployed or economically inactive will be considered priority residents where they satisfy one or more of the following criteria:

- 145.1. Have been unemployed or economically inactive for 6 months or more prior to enrolment.
- 145.2. Have prior attainment below full level 2
- 145.3. Have literacy, numeracy or ESOL needs assessed to be below level 2
- 145.4. Are aged 50 or above

Employed Priority Residents

146. Individuals who are employed will be considered priority residents where they satisfy one or more of the following criteria:

- 146.1. Have an income that falls below the Real Living Wage
- 146.2. Have prior attainment below full level 2
- 146.3. Have literacy, numeracy or ESOL needs assessed to be below level 2

Low Priority Residents / Provision

- 147. All remaining provision which has not been classified in support of either National Skills Fund Level 3 Entitlement / Free Courses for Jobs, Green Skills, Unemployed Priority Residents or Employed Priority Residents will be considered to be low priority and designated as such.
- 148. Devolved Area Monitoring (DAM) and Learning Delivery Monitoring (LDM) codes have been issued for the funding and policy changes the Combined Authority are implementing. Performance will be measured using these codes, ILR fields and the Profiles in your Curriculum & Delivery Plans. A separate Technical Guidance Note will be made available to providers, detailing how these elements will be monitored and any action required from you. The Combined Authority will be monitoring recording from the R01 data return.
- 149. The elements reflected in your ILR and monthly claim report submissions must align with the Profiles in your Curriculum & Delivery Plans. The applicable element is specific to a particular learner on a particular course at a particular time, and as such a learner undertaking several courses throughout the year may change elements. Additionally, different learners enrolled on the same aim may also be in different elements.
- 150. Where the data does not support the funding, you have claimed, we will take action to get this corrected and could recover funds you have claimed.
- 151. All destinations and/or progression details are a mandatory reporting requirement for West of England learners. Destination and progression must be detailed in the defined fields of the ESFA ILR and reported within 2 months.

Self-declarations by learners

- 152. All self-declarations must confirm the learner's details and describe what the learner is confirming for requirements set out in this document.
- 153. If a learner self-declares prior attainment, you must check this against the information held in the personal learning record (PLR) and query any contradictory information with the learner. The PLR will not necessarily override the learner's self-declaration.

Section 2 - Combined Authority funded AEB

Provision and individuals we fund

154. The Combined Authority funded Adult Education includes support for four legal entitlements to full funding for eligible adult learners.
155. These entitlements are set out in the [Apprenticeship, Skills, Children and Learning Act 2009](#) and enable eligible learners to be fully funded for one or more of the following qualifications:
- 155.1. English and maths, up to and including level 2, for individuals aged 19 and over, who have not previously attained a GCSE grade 4 (C) or higher
 - 155.2. First full qualification at level 2 for individuals aged 19-23
 - 155.3. First full qualification at level 3 for individuals aged 19-23
 - 155.4. Essential Digital Skills Qualifications, up to and including level 1, for individuals aged 19 and over with digital skills assessed at below level 1
156. The level 2 and level 3 legal entitlements follow the definition of fullness in the full level 2 and full level 3 sections respectively. A learner can only be fully funded for one vocational qualification from the entitlement qualifications list when exercising their legal entitlement. Appropriate information, advice and guidance should be given to a learner and they should be made aware of their entitlement rights and progression routes on completing an entitlement qualification.

Legal Entitlements

157. If an individual meets the legal entitlement eligibility criteria, the Combined Authority entitlement criteria or any other criteria which affords the learner access to full funding, you must not charge them any course fees.
158. Eligible learners exercising their legal entitlement must be enrolled on qualifications that have been approved for funding through the relevant entitlement. For the funding year 2023 to 2024, providers can find the details of approved qualifications at <https://www.qualifications.education.gov.uk/> for the following entitlement offers:
- Level 2 and level 3 and/or

- English and maths and/or
- Essential digital skills qualifications

The Level 3 Adult Offer and the Level 3 Legal Entitlement

159. Eligible learners aged 19 to 23 can access all qualifications from the level 3 adult offer. If a learner aged 19 to 23 completes a qualification that is included on both the legal entitlement list and the level 3 adult offer list, they will have exercised their level 3 legal entitlement.

Local Flexibility

160. The Combined Authority funded AEB also supports the delivery of flexible tailored provision for adults, including qualifications and components of these and / or non-regulated learning, up to level 2, referred to as 'local flexibility'. Such provision is either fully or co-funded, depending on learner's age, prior attainment and circumstances. Where appropriate for the learner you may deliver local flexibility provision alongside a legal entitlement qualification.

161. Learners aged 19 to 23 progressing towards their first full level 2, must undertake learning at entry and/or level 1 only from local flexibility.

Local Flexibility and Legal Entitlements

162. Learners aged 19 to 23 who progress to their first full level 2 must only enrol on a qualification from the DfE list of qualifications approved for funding.

163. Learners aged 19 to 23 and aged 24 and over who have already achieved at level 2 or above can undertake learning up to and including level 2 qualifications from the local flexibility offer or qualifications for level 2 legal entitlement available on the DfE list of qualifications or find a learning aim.

164. Learners aged 24 and over who have not achieved a level 2 qualification can undertake learning up to and including level 2 qualifications from the local flexibility offer or qualifications in level 2 legal entitlement list available on the DfE list of qualifications or find a learning aim.

West of England Combined Authority Entitlement

165. In addition to the four legal entitlements and local flexibility offers set out above, we have established additional Combined Authority Entitlements to broaden access to fully funded learning amongst West of England Combined Authority residents. These include:

- 165.1. ESOL: Regulated ESOL qualifications, up to and including level 2, for individuals aged 19 or over.
- 165.2. Retraining (L2): A single additional full level 2 qualification for learners aged 50 and above already qualified at full level 2 but not already qualified at level 3 or above.
- 165.3. Retraining (L3): A single additional full level 3 qualification for learners aged 19 to 25 or 50 and above already qualified at full level 3 but not already qualified at level 4 or above.

Access to funding for learners aged 19 to 23

- 166. Learners aged 19 to 23 are fully funded through legal entitlement for:
 - 166.1. English and Maths, up to and including level 2, for those who have not previously attained a GCSE grade 4 (C) or higher
 - 166.2. Essential Digital Skills and Digital Function Skills qualifications up to and including level 1, for those with digital skills assessed at below level 1
 - 166.3. First full level 2 qualification, excluding English and Maths
 - 166.4. First full level 3 qualification

- 167. Learners aged 19 to 23 are also fully funded for:
 - 167.1. Qualifications on the free courses for jobs offer qualifications list where they do not have a full level 3 or above, or they already hold a level 3 or above and are unemployed or employed on a low wage
 - 167.1.1. Once a learner has been funded by the free courses for jobs offer in line with the funding rules, they will have exhausted their eligibility for the offer
 - 167.2. Learning aims at entry level or level 1 which support progression towards a first full level 2
 - 167.3. Learning aims up to and including level 2 from the local flexibility offer where they have already achieved a first full level 2 qualification and are unemployed or employed on a low wage
 - 167.4. ESOL learning, up to and including level 2, for those who are unemployed or employed on a low wage through local flexibility, or through the Combined Authority entitlement otherwise
 - 167.5. A single additional full level 3 qualification, if their highest qualification level is a full level 3, where the qualification is on:
 - 167.5.1. Level 3 legal entitlement list, or
 - 167.5.2. Level 3 free courses for jobs,
 - 167.6. A single additional non-full level 3 qualification, if their highest qualification level is a full level 3, where the qualification is on:
 - 167.6.1. Level 3 free courses for jobs offer list
 - 167.7. Any Trade Union course

168. Learners aged 19 to 23 are co-funded for:
- 168.1. Learning aims up to and including level 2 from the local flexibility offer where they have already achieved a first full level 2 qualification and they are **not** unemployed or employed on a low wage
 - 168.2. Any subsequent level 2 qualifications following the achievement of a level 2 qualification that is classed as a full level 2, unless funded through Combined Authority Entitlement. This restriction still applies if the level 2 qualification was classed as a full level 2 at the time the learner started but is no longer classed as such

Access to funding for learners aged 24 and above

169. Learners aged 24 and above are fully funded through legal entitlement for:
- 169.1. English and Maths, up to and including level 2, for those who have not previously attained a GCSE grade 4 (C) or higher
 - 169.2. Essential Digital Skills and Digital Function Skills qualifications up to and including level 1, for those with digital skills assessed at below level 1
170. Learners aged 24 and above are also fully funded for:
- 170.1. First full level 2 qualification, excluding English and Maths, where they are unemployed or employed on a low wage
 - 170.2. Qualifications on the free courses for jobs offer qualifications list where they do not have a full level 3 or above, or they already hold a level 3 or above and are unemployed or employed on a low wage
 - 170.2.1. Once a learner has been funded by the free courses for jobs offer in line with the funding rules, they will have exhausted their eligibility for the offer
 - 170.3. Learning aims at entry level or level 1 which support progression towards a first full level 2, where the learner is unemployed or employed on a low wage
 - 170.4. Learning aims up to and including level 2 from the local flexibility offer where they are unemployed or employed on a low wage
 - 170.4.1. Eligibility for this is not affected by prior attainment, and learners can access this regardless of whether they have previously achieved at a first full level 2 or above
 - 170.5. ESOL learning, up to and including level 2, for those who are unemployed or employed on a low wage through local flexibility, or through the Combined Authority entitlement otherwise
171. Learners aged 24 to 25, or aged 50 and above, are also eligible to be fully funded for:
- 171.1. A single additional full level 3 qualification, if their highest qualification level is a full level 3, where the qualification is on:
 - 171.1.1. Level 3 legal entitlement list, or
 - 171.1.2. Level 3 free courses for jobs,

172. Learners aged 50 and above are also eligible to be fully funded for:
- 172.1. A single additional non-full level 3 qualification, if their highest qualification level is a full level 3, where the qualification is on:
- 172.1.1. Level 3 free courses for jobs offer list
173. Learners aged 24 and above are co-funded for:
- 173.1. First full level 2 qualification, excluding English and Maths, where they are **not** unemployed or employed on a low wage
- 173.2. Learning aims at entry level or level 1 which support progression towards a first full level 2, where the learner is **not** unemployed or employed on a low wage
- 173.3. Learning aims up to and including level 2 from the local flexibility offer where they are **not** unemployed or employed on a low wage
- 173.3.1. Eligibility for this is not affected by prior attainment, and learners can access this regardless of whether they have previously achieved at a first full level 2 or above

Work Experience and Work Tasters

174. Under reforms introduced by the Combined Authority, both Work Experience Placements and Work Tasters will be directly fundable elements of adult education provision in 2023/24.
175. In order to access this funding, providers should use one of the specific learning aim references created by the Combined Authority, detailed below, to record this provision in the ILR which details can be seen in the below.

LAR Class code	Learning Aim Title
Z0009121	Work Experience / Work Placement (3-4 hours)
Z0009122	Work Experience / Work Placement (5-6 hours)
Z0009123	Work Experience / Work Placement (7-12 hours)
Z0009124	Work Experience / Work Placement (13-20 hours)
Z0009125	Work Experience / Work Placement (21-44 hours)
Z0009126	Work Experience / Work Placement (45-68 hours)
Z0009127	Work Experience / Work Placement (69-92 hours)
Z0009128	Work Experience / Work Placement (93-100 hours)
Z0009129	Work Experience / Work Placement (101-196 hours)
Z0009130	Work Experience / Work Placement (197-292 hours)

176. Providers are encouraged to incorporate Work Experience into all programmes for residents with little or no recent and / or good work experience.

The Combined Authority contribution

table

177. Definitions can be found in paragraphs 140- 176.

Tables showing the Combined Authority Adult Funding Qualifications and Entitlements (with contributions)

PROVISION	ACCESS TO FUNDING	ACCESS TO FUNDING
	LEARNERS AGED 19-23	LEARNERS AGED 24 AND ABOVE
English and Maths up to and including L2	FULLY FUNDED	FULLY FUNDED
ESOL up to and including L2	FULLY FUNDED	FULLY FUNDED
Essential Digital Skills Qualifications up to and including L1	FULLY FUNDED	FULLY FUNDED
Up to and including L2 (not full) that supports progression towards first full level 2	FULLY FUNDED [Up to and including L1 only]	FULLY FUNDED [Unemployed or Low Wage]
	NOT FUNDED [L2 (not full)]	CO-FUNDED [All Other Learners]
Up to and including L2 (not full) that does not support progression towards first full level 2	FULLY FUNDED [if unemployed or low wage and already qualified at FL2]	FULLY FUNDED [Up to and including L2 - Unemployed or Low Wage]
	CO-FUNDED [if already qualified at FL2 and not eligible for full funding]	CO-FUNDED [Up to and including L2 - All Other Learners]
Level 2 (not first full)	NOT FUNDED [Other than English, Maths and ESOL as detailed above]	FULLY FUNDED [Unemployed or Low Wage]
		FULLY FUNDED [The Combined Authority Entitlement - Retraining (L2) for those aged 50+ with a highest level of qualification of FL3, any trade union course, a single additional full level 2 qualification or legal entitlement] CO-FUNDED [All Other Learners]
First Full Level 2	FULLY FUNDED	FULLY FUNDED [Unemployed or Low Wage]
		CO-FUNDED [All Other Learners]
First Full Level 3	FULLY FUNDED	FULLY FUNDED [Approved Qualifications from the Level 3 adult offer list]
		NOT FUNDED [All other L3 provision]
Level 3 (not first full)	FULLY FUNDED [Approved Qualifications from the Level 3 adult offer list which are not full level 3 qualifications where the learner is not already qualified to full level 3]	FULLY FUNDED [The Combined Authority Entitlement - Retraining (L3): A single additional full level 3 qualification or a non-full level 3 qualification from the Level 3 adult offer list undertaken by learners aged 24-25 or 50 and above already qualified at FL3 but not yet qualified at L4 or Above]
	FULLY FUNDED [The Combined Authority Entitlement - Retraining (L3): A single additional full level 3 qualification or a non-full level 3 qualification from the NSF L3 Offer list undertaken by learners already qualified at FL3 but not yet qualified at L4 or Above]	
	NOT FUNDED [All other L3 provision]	

NOTE: Once a learner has been funded by Free Courses for Jobs (FCFJ) / National Skills Funding Level 3 (NSF L3) in line with the funding rules, they will have exhausted their eligibility for FCFJ/ NSF L3 offer.

Definitions used in the adult education budget

Unemployed

We will update the universal credit thresholds to align to any revisions made by the Department for Work and Pensions (DWP).

178. For funding purposes, we define a learner as unemployed if one or more of the following apply:
- they receive Jobseeker’s Allowance (JSA), including those receiving National Insurance credits only
 - they receive Employment and Support Allowance (ESA)
 - they receive Universal Credit (UC) and their take-home pay as recorded on their UC statement (disregarding UC payments and other benefits) is less than £617 a month, where learner is sole adult in their benefit claim, or £988 a month, where learner has a joint benefit claim with their partner
 - they are released on temporary licence, studying outside a prison environment, and not funded by the Ministry of Justice
179. Providers may also use their discretion to fully fund other learners if all of the following apply:
- the learner receives other state benefits (not listed above) and
 - the learner wants to be employed, or progress into more sustainable employment, and you are satisfied identified learning is directly relevant to their employment prospects and the local labour market needs
 - their take-home pay (disregarding UC payments and other benefits) is less than £617 a month, where learner is sole adult in their benefit claim, or £988 a month, where learner has a joint benefit claim with their partner

Learners in receipt of low wage

180. You may fully fund learners who are employed, or self-employed, up to and including level 2 where you are satisfied that the learner is both:

180.1. eligible for co-funding, and

180.2. earns less than £23,400.00 annual gross salary

180.2.1. This figure is calculated using the Real Living Wage, announced on 24th October 2023 to be £12.00 per hour, and will be updated accordingly following any amendments to this figure

181. In these circumstances, you must have seen evidence of the learner's gross annual wages. Such evidence could include a wage slip or a UC statement within 3 months of the learning start date, or a current employment contract stating gross monthly/annual wages. Please note, this is not an exhaustive list, but any evidence relied upon must support your decision to award full funding to an individual who would normally be eligible for co-funding.
182. If an individual meets the low wage eligibility criteria, you must not charge them any course fees.
183. To claim full funding for learners who meet these requirements, you must use the DAM codes DAM010 and DAM023, as well as FFI code 1.

Initiatives

Heavy goods vehicle (HGV) driver training

This offer, originally introduced in 2021 to 2022, has been extended for the 2023 to 2024 academic year.

HGV driver training flexibilities have been developed to support an increase in HGV driver training. The 2023 to 2024 offer:

- includes level 2 qualifications which will prepare learners for HGV licence acquisition of all vehicles up to category C and E (articulated)
- includes additional qualifications that are approved for training in this sector throughout the 2023 to 2024 academic year
- allows all eligible learners, fully funded and co-funded, to be reimbursed for the cost of HGV licences and medical

184. Learners must be eligible under the criteria for Combined Authority funded AEB eligibility and enrolled on one of the targeted approved for funding level 2 qualifications listed in find a learning aim.
185. For learners, we will fund the first attempt only for:
- the HGV licence as part of a programme of training and
 - the medical, at a cost of £61 per learner and/or
 - a licence to upgrade from category C to category C+E

186. Providers must:

186.1. use learning aims that are marked with:

- category code 50: HGV Emergency Response, to identify an approved qualification, and
- category code 51: HGV Medical for the additional learning aim to represent the HGV medical and
- category code 52: HGV Licence, for the additional learning aim(s) to represent parts of the Driver Certificate of Professional Competence (CPC) tests required to attain the licence, when learners undertake these elements

186.2. record an outcome of “Achieved” in the ILR where you have a recorded learning aims for the HGV licence and medical aim, to generate reimbursement funding for these activities

186.3. have criteria for how you will administer and distribute your funds

186.4. retain evidence in the learner file confirming that you have verified the medical test and licence documentation, and evidence from your accounts of the payment made to the learner and learner’s receipt of the funds

187. Working with industry specialists the Department for Work and Pensions (DWP), the following substantial programme of learning has been developed as the preferred regional approach to address the challenges faced by the logistics industry.

188. Through a Sector Based Work Academy Program (SWAP) the programme aims to fully train learners who have no HGV driver experience to be licence ready within four weeks *subject to delays for provisional licence and available test places. The programme is outlined in the table below.

Training	Learning Outcome	Funded amount	Qualification Aim Number
Initial Assessment	Initial assessment to establish the suitability of the programme of study for the learner	£60	Z0009255
Career Education Advice and Guidance	To look at career options and address barriers to commencing a career in HGV driving	£60	Z0009256
Medical and CPC (theory)	Driver medical funded and support provided sending off Provisional licence. Theory will cover the criteria for the CPC	£250	Z0009550

Training	Learning Outcome	Funded amount	Qualification Aim Number
	delivered online through a digital platform		
Award in employability skills	Support with Interview skills and CV writing	£300	60146801
Certificate in Principles Warehousing	Warehouse Operative <i>(Optional, while waiting for provisional licence)</i>	£724 (Optional)	60013448
Test retake support (theory)	Theory support for test retakes	£100	Z0009551
Cat C and E training	Funded training for learners to drive both Cat C and Cat E vehicles 40 hours @ £45p/h	£1,800	Z0009552
Work experience	Work exp/placement (21/44 hours)	£150	Z0009125
Total		£2,720 (£3,444)	

189. Initial assessment

189.1. Is used to assess a learner's suitability for the learning before enrolling onto the programme. If a learner is unable to demonstrate knowledge/suitability at the right level, then stepping stone routes to improve skills will be outlined.

190. Careers Education, Information, Advice and Guidance (CEIAG)

190.1. Learners will take a deeper look at the logistics industry and what it means to be an HGV Driver. Potential barriers to employment are discussed and recommendations made. Here learners must provide evidence of a clean car driving licence.

191. Medical and Driver Certificate of Professional Competence (CPC) theory

191.1. The Combined authority will fund providers for the learner's medical assessment and fund the CPC theory that will enable learners to take their CPC assessment. This funding does not include funding for the tests, this will be funded in full by the DWP. A learner's job coach will be able to provide full information on how to claim this.

192. Award in employability skills

192.1. This award will be delivered against the expectations of the logistics and haulage industry. The qualification will support a learner develop their interview skills and Curriculum Vitae (CV). It will also identify and help develop learners' soft skills required in the industry such as planning, communication, and the importance of personal appearance.

193. Certificate in Principles of Warehousing (Optional)

193.1. This is an additional qualification that will support learners understanding of how a warehouse operates in relation to loading and unloading HGVs. This additional qualification provides opportunity for work within a warehouse setting whilst waiting for provisional licences to arrive. There might also be opportunity to take a forklift licence at this time.

194. Test retake support (theory)

194.1. Funding is available for providers to work 1-2-1 with the learner to support them to pass the test at the second attempt. This funding can only be claimed once.

195. Cat C and E training

195.1. Driver training will be funded. Now the tests are combined and have a reduced total learning time of 20 hours the Combined authority will fund this at £35 per hour for 20 hours. The CPC test element will be covered by the DWP.

196. Work experience

196.1. As with any SWAP there should be a period of work experience which the Combined Authority will fund this. In the example 21-44 hours of funded work experience has been proposed, although other funded alternatives are available.

197. Provider's information:

197.1. This substantive programme of learning is available to all providers who can offer HGV training and should be advertised as any traditional SWAP.

197.2. The Combined Authority and DWP are supportive of providers making initial links with employers, however the DWP must be made aware of the employers prior to the commensuration of any learning.

197.3. The DWP will pay for the CPC tests.

Management Information System (MIS) teams can setup the SWAP as a programme of study where all study elements are mandatory. Further guidance on funded work experience aims are available on the West of England Combined Authority [website](#).

Licence to practise and/or standalone qualifications

198. Providers must ensure the learner obtains a licence that confirms the licence holder meets prescribed standards of competence. This includes

situations where it is unlawful to carry out a specified range of activities for pay without first having obtained a licence.

199. Certain qualifications which meet statutory employer requirements or a licence to practise are eligible for unemployed learners. These qualifications are shown in Find a Learning Aim under the ‘Standalone and Licence to Practise’ category, and are:
- 199.1. forklift truck, food safety and health and safety
 - 199.2. security guarding, door supervision and CCTV operations (public space surveillance), needed to obtain a Security Industry Authority (SIA) licence
 - 199.2.1. We will only fund the security qualifications if one of the following commits to funding the subsequent SIA licence, which allows the learner to enter a job:
 - 199.2.1.1. a local employer
 - 199.2.1.2. individual
 - 199.2.1.3. work programme provider
 - 199.2.1.4. Jobcentre Plus
200. Examples of qualifications, courses and licences which do not fall within this rule and may not be supported through your adult education allocation include, but are not limited to, CSCS Cards and Driving Licences.
201. You can find more information about these qualifications in the ESFA Qualification Eligibility Principles document on the GOV.UK website.

Trade Union training

202. Where you deliver Trade Union learning to Trade Union representatives to support and professionally represent their colleagues over issues such as pay and conditions, you may claim full funding for Trade Union provision.
203. This includes provision covering a range of Level 1 & Level 2 Awards, Certificates & Diplomas including Employment Law, Union Reps, H&S Reps, Occupational H&S, Women in Leadership & non-regulated courses covering sexual harassment, racism & tolerance.

Sector-based work academy programme (SWAP)

204. The sector-based work academy programme (SWAP) is designed to help Jobcentre Plus claimants build confidence to improve their job prospects and

enhance their CV, whilst helping employers in sectors with current local vacancies to fill them. SWAP can last up to 6 weeks and has 3 main components:

- 204.1. pre-employment training
- 204.2. work experience placement
- 204.3. a guaranteed job interview

- 205. The scheme runs in England (and Scotland). Participants remain on benefits throughout their placement.
- 206. Only the pre-employment training element in England can be funded through AEB local flexibility, and normally lasts 2-3 weeks. Jobcentre Plus fund the other components and will pay any travel and childcare costs whilst claimants are on the work experience placement.
- 207. You must record in the evidence pack that you have seen the claimant's SWAP referral notification issued by Jobcentre Plus setting out start date and times for their AEB funded pre-employment training.
- 208. To claim full funding for claimant referred to SWAP pre-employment training, you must use LDM code 375 and complete the Benefit Status Indicator (BSI) to identify the claimant is in receipt of Jobseeker's Allowance (BSI 1), Universal Credit (BSI 4), or Employment and Support Allowance (BSI 5).

National Skills Fund Level 3 Offer (NSF L3 Offer / Free Courses for Jobs Offer)

- 209. Free courses for jobs (FCFJ) is a targeted level 3 offer to support adults without an existing full level 3 qualification and adults who meet the definition of 'low wage' or 'unemployed'.
- 210. The offer includes:
 - 210.1. Level 3 qualifications which will support the development of new skills for adult learners and improve the prospects of eligible adults in the labour market. In particular, adults aged 24+ will now be able to access fully-funded Level 3 provision from the list of qualifications available via the [DfE list of qualifications approved for funding](#)
 - 210.2. Additional level 3 qualifications for 19 to 23-year-olds that are not included in the legal entitlements
 - 210.3. Support funding
 - 210.4. The ability for eligible learners to take one short qualification (identified by category code 49) without exhausting their eligibility. We expect this

flexibility to be used where a learner could benefit from a more substantial qualification once they have completed a short qualification.

211. An uplift, payable at 2 different rates, follows the earnings methodology set out in the funding rates and formula document and should be used to support delivery of the level 3 FCFJ offer.
212. Only level 3 qualifications included in this offer will attract an uplift. There may be additions to the list to ensure it meets the needs of the economy, and providers are encouraged to check funding validity regularly. Valid qualifications will have category code 45, 46, 48 or 49 on find a learning aim. Please ensure you refer to the category codes, rather than the funding stream, on find a learning aim.
213. When qualifications are added to the list, they will become eligible for funding from that publication date and will not be backdated.
214. Please note, this policy is subject to potential further amendments and clarifications.
215. We will fully fund individuals as part of this offer where they:
- 215.1. are aged 19 or above on 31 August 2023, and
 - 215.2. enrol on a level 3 FCFJ qualification approved for funding, and
 - 215.2.1. have not achieved a full level 3 qualification or above which meets the requirements set out in the full level 3 section, or
 - 215.2.2. are unemployed or employed on a low wage, including those who already have a level 3 qualification or higher
216. The Combined Authority entitlements may enable other learners to undertake qualifications which form part of the offer on a fully funded basis (for example the entitlement to additional L3 qualifications). Where this is the case, the qualification would not be funded as part of the offer and would not attract the associated uplifts.
217. Eligible learners may also be funded for one 'short' qualification (identified by category code 49) without exhausting their eligibility, followed by one further qualification in the level 3 FCFJ offer. 'Short' qualifications are identified by category code 49 which can be found in level 3 FCFJ offer - short qualification within [find a learning aim](#).
218. You must not claim for funding for qualifications in the FCFJ offer where learners are already being funded through an advanced learner loan or a skills bootcamp (where applicable).

219. Once a learner has been funded by FCFJ in line with the above, they will have exhausted their eligibility for the offer and can no longer access FCFJ funding. Learners accessing low wage and unemployment flexibilities cannot be funded if they have previously been funded via FCFJ.
220. When recording FCFJ offer aims, you must:
- 220.1. use LDM code 378 and FFI code 1 to claim for funding
 - 220.2. record the employment status of learners accessing the offer in the ILR
 - 220.3. use LDM code 382 when recording learners who meet the low wage eligibility criteria
221. To determine qualifications that are eligible for FCFJ funding you must use learning aims that are marked with the following category codes:
- 45: National Skills Fund Level 3 Free Courses for Jobs rate 1
 - 46: National Skills Fund Level 3 Free Courses for Jobs rate 2
 - 48: National Skills Fund Level 3 Free Courses for Jobs only
 - 49: National Skills Fund Level 2 Free Courses for Jobs - short qualification
222. In regard to reconciling your National Skills Fund allocation, at the end of the 2023 to 2024 funding year a 3% reconciliation tolerance will be applied. Where your delivery is at least 97% of your allocation, we will not make a year-end adjustment and you will not have to pay back any unspent funds.

Full Level 2

223. Full Level 2 is the level of attainment which is demonstrated by a:
- 223.1. General Certificate of Secondary Education (GCSE) in 5 subjects, each at grade 4 (C) or above, or
 - 223.2. Technical Certificate at level 2 which meets the requirements for the 16 to 19 performance tables
224. If a learner, aged 19 to 23, has achieved a level 2 qualification that was, at the time they started, or still is, classed as a full level 2, any subsequent level 2 qualifications will be fully funded if they meet the definition of unemployed or the eligibility criteria for learners in receipt of low wage.

Full Level 3

225. Full Level 3 is the level of attainment which is demonstrated by a:

- 225.1. General Certificate of Education at the advanced (A) level in 2 subjects
 - 225.2. General Certificate of Education at the AS level in 4 subjects
 - 225.3. QAA Access to Higher Education (HE) Diploma at level 3
 - 225.4. Technical level, or applied general qualification at level 3, which meets the requirements for the 16 to 19 performance tables
 - 225.5. Core maths at level 3
226. If a learner has achieved a level 3 qualification that was not classed as a full level 3 at the time, they started it but has since been classed as such and wants to enrol on any subsequent level 3 qualification of any size, they may apply for an advanced learner loan (provided the qualification is designated for funding, and subject to learner eligibility conditions), or pay for their own learning. From 1 April 2022 there is an exception to this rule; a learner will be fully funded under the level 3 adult offer if they meet the definition of unemployed or the eligibility criteria for learners in receipt of low wage.
227. For new linear AS and A levels, where a learner enrolls on an AS qualification and continues to take the A level qualification in the same subject, you must record both the AS and A level in the ILR. The AS learning aim will be funded separately to the A level learning aim.

Approved qualifications

228. Where you deliver regulated qualifications and/or their components, you must ensure they are approved for funding and available on [Find a Learning Aim](#). [Qualifications and public funding](#) provides information on qualifications that are no longer approved for funding.
229. Where you deliver approved qualifications and / or their components you must ensure that learners are registered for the qualifications and / or component in line with the awarding policies and procedures. You must not ‘pre-register’ students a significant period in advance of the learner starting the qualification. You also should not register learners a significant time after their learning has commenced.
230. We will fund qualifications that are linked to occupational regulation/licence to practise. You can find more information about these qualifications at the [qualifications website](#).’
231. Before delivering a component, you must check with the awarding organisation they provide a learner registration facility, and the learner can

achieve it alone or as part of accumulating achievement towards a qualification.

232. If the [UK ENIC](#) has confirmed the authenticity of a qualification gained overseas and confirmed it is comparable/compatible with a regulated qualification in England, currently part of the level 2 and level 3 [legal entitlement](#), the individual will be deemed to have achieved their first level 2 and/or level 3 qualification.
233. You must provide accurate unique learner number (ULN) information to awarding organisations and ensure all information you use to register learners for qualifications is correct. You can find more information in the [Learner Records Service](#) guidance.

Non-regulated learning

234. Where you deliver non-regulated learning, you must ensure it is eligible for funding. Such learning could include:
- independent living skills or engagement learning supporting adults to operate confidently and effectively in life and work
 - locally commissioned and/or locally developed basic knowledge and skills needed to access technical qualifications
 - employability and labour market re-entry
 - locally commissioned and/or locally devised technical education short courses (also known as taster sessions)
 - community learning courses
 - basic digital skills courses, including where learners are unable to undertake digital skills qualification specified in the digital entitlement
235. The eligibility principles we apply to non-regulated learning are as follows:
- 235.1. It must not be provision linked to UK visa requirements
- 235.2. It must not be provision linked to occupational regulation unless there is an agreed concession in place
- 235.3. It must not be restricted to being delivered to employees of only one employer
- 235.4. It must not be learning that should be part of a learner's experience, for example 'induction to college'
- 235.5. It must not be a non-regulated version of a regulated qualification or of a component of a regulated qualification
- 235.6. It must not be above notional level 2
- 235.7. At notional level 2, it must focus on technical provision

236. Where you are delivering non-regulated learning, you must ensure you have appropriate and robust quality assurance processes in place. For instance, ‘The Recognising and Recording Progress and Achievement (RARPA) Cycle’. Further information on RARPA is available from the [Learning and Work Institute](#).
237. It is the intention of the Combined Authority to use the RARPA model to monitor, review and measure the quality and outcomes from non-regulated provision in 2023/24. Non-regulated learning should have clear achievement aims for the learners and identified progression outcomes prior to commencement of learning.

Learning in the workplace

238. We will fund learning in the workplace where a learner is entitled to full funding under the legal or the Combined Authority entitlements, including for the level 3 FCFJ offer.
239. We will co-fund learning within the workplace where a learner is entitled to co-funding. When the learning is available on a co-funded basis the fee must be paid by the employer rather than the learner.
240. The provider may accept payment in the form of a commensurate volume of work experience opportunities (which should be shared across all the Combined Authority providers if the original provider is unable to make efficient use of them). The employer will have paid once the Work Experience Opportunity has been utilised.

Total co-funding contribution required	Duration of commensurate work experience placement
£1 - £21	4 hours
£22 - £34	6 hours
£35 - £50	12 hours
£51 - £100	20 hours
£101 - £150	44 hours
£151 - £300	68 hours
£301 - £450	92 hours
£451 - £600	100 hours
£601 - £724	196 hours
£725 - £1,265	292 hours

241. The priority for utilisation is as follows:

- 241.1. Utilised by the provider delivering the co-funded aim in support of the Combined Authority Adult Education Provision
 - 241.2. Utilised by any provider in support of Combined Authority funded AEB
 - 241.3. Utilised by the provider delivering the co-funded aim in support of other provision that benefits the Combined Authority residents (e.g. traineeships, Careers Hub, Future Bright, Work Force for The Future)
 - 241.4. Utilised by any provider in support of Combined Authority residents
242. The employer contribution through Work Experience Opportunity will not be paid if the individual benefitting from the Work Experience Opportunity is not a Combined Authority resident.
243. Where you have agreement in place with the Combined Authority Adult Education to deliver workplace provision, you must record DAM code 024 against every learning aim delivered in the workplace. This code should not be used without an agreement in place. For further information please refer to the [Technical Note](#).
244. We will not fund any qualification or aim delivered at an employee's workplace, and relevant to their job or their employer's business, unless:
- 244.1. it is a legal entitlement qualification, and/or
 - 244.2. it is included in the level 3 FCFJ offer, and/or
 - 244.3. DfE and/or ESFA have confirmed a national level concession that responds to a significant negative economic impact for a specific industry, or work placement or experience, unless delivered as part of a continuing traineeship or the Prince's Trust Team programme

English and maths for those aged 19 or older

245. We will fully fund individuals aged 19 or older who have not previously attained a GCSE grade 4 (C) or higher in English and maths as part of their legal entitlement on the day they start the following qualifications:
- 245.1. GCSE English language or maths
 - 245.2. Functional Skills English or maths from Entry to level 2
 - 245.3. Stepping-stone qualifications (including components, where applicable) in English or maths approved by DfE
246. If a learner wants to 'retake' their GCSE English and maths qualification because they did not achieve a grade 4 (C) or higher, we will not fund the learner to only resit the exam.

247. You must not enrol individuals on qualifications which are not necessary for progressing towards a GCSE or Functional Skill level 2. You must not enrol individuals on entry level aims when a combination of prior attainment, diagnostic testing and initial assessment indicates that the learner is already capable of enrolling and achieving at a higher level.
248. You must not fund an apprentice or trainee for English or maths from the Combined Authority AEB.
249. We will fully fund non-regulated English and maths learning for learners aged 19 years and over, including those assessed at pre-entry level with significant learning difficulties and/or disabilities as part of a personalised learning programme, where assessment has identified the learner cannot undertake provision identified in the first paragraph of this section.
250. You must:
- 250.1. carry out a thorough initial assessment to determine an individual's current level using current assessment tools based on the national literacy and numeracy standards and core curriculums or DfE published English and Maths Functional Skills subject content
 - 250.2. carry out an appropriate diagnostic assessment to inform and structure a learner's evidence pack to use as a basis for a programme of study
 - 250.3. enrol the learner on a level above that at which they were assessed, and be able to provide evidence of this
 - 250.4. deliver ongoing assessment to support learning
 - 250.5. record the evidence of all assessment outcomes in the evidence pack
251. The assessments must place a learner's current skills levels within the level descriptors used for the RQF.

Digital Entitlement for those aged 19 and over

252. We will fully fund individuals aged 19 or older and assessed at below level 1 as part of legal entitlement on the day they start the following qualifications:
- 252.1. Essential digital skills qualification (EDSQ) up to and including level 1
 - 252.2. Digital functional skills qualifications (DFSQ) up to and including level 1
253. We will fully fund non-regulated learning for learners, including those assessed at pre-entry level with significant learning difficulties and/or disabilities as part of a personalised learning programme, where assessment has identified the learner cannot undertake provision identified in the first paragraph of this section. This provision must be aligned with the national

standards for essential digital skills and must not be a non-regulated version of a regulated qualification (see rules for non-regulated learning).

254. You must:
- 254.1. carry out an initial assessment using current assessment tools based on the national standards for essential digital skills
 - 254.2. carry out an appropriate diagnostic assessment to inform and structure a learner's learner file to use as a basis for a programme of study
 - 254.3. enrol the learner on a level above that at which they were assessed and be able to provide evidence of this
 - 254.4. deliver ongoing assessment to support learning
 - 254.5. record the evidence of all assessment outcomes in the evidence pack
255. The assessments must place a learner's current skills levels within the level descriptors used for the RQF.

English for Speakers of Other Languages (ESOL)

256. We will fund ESOL learning up to and including level 2.
257. Providers offering ESOL qualifications may need to deliver additional learning to individual learners that incurs additional cost above the qualification rate. From the beginning of the 2023/24 academic year, the Combined Authority will increase funding rates for all regulated literacy, numeracy and ESOL learning aims delivered at level 2 by 50% (in comparison to the published national rate) to incentivise increased participation and achievement at the level which equates to functionality. This is in addition to any other uplifts attracted by the learner. You can access information on this in the [Combined Authority Adult Education Funding Rates and Formula 2023 to 2024](#).

Learners with learning difficulties and/or disabilities

258. We will fund learners with learning difficulties or disabilities as set out in the Apprenticeships, Skills, and Children and Learning Act 2009, section 111.
259. The Combined Authority has the responsibility for securing the provision of reasonable facilities for education and training suitable to the requirements of persons who are 19 and over. This includes learners with an identified learning difficulty and/or disability who have previously had an education, health and care (EHC) plan and have reached the age of 25.

260. The ESFA's funding methodology will apply to learners aged 19 to 24, who have an EHC plan and require provision and support costs, funded by the ESFA. You can access the ESFA's funding methodology on the [GOV.UK website](https://www.gov.uk).

Learners with an education, health and care (EHC) plan

261. To access provision and support costs you must inform us before the start of the 2023 to 2024 funding year where a learner:
- 261.1. has reached the age of 25 and has not completed their programme of learning as set out in their EHC plan by the end of the previous funding year, or
 - 261.2. will reach the age of 25 in the funding year, where their EHC plan is not extended by their local authority to allow them to complete their programme of learning
262. The learner must:
- 262.1. have an EHC plan that confirms their needs could only be met by the training organisation they are, or were, attending and
 - 262.2. continue to make progress on the programme of learning as set out in their EHC plan.
263. If a learner has an EHC plan, you must report this in the 'Learner funding and monitoring' fields in the ILR.
264. We will not fund learners whose EHC plan is extended by the local authority beyond their 25th birthday. The local authority must continue to provide top-up funding and contract directly with the institution.

Community Learning

265. This section only applies to providers with a non-formula community learning allocation included in their funding agreement.
266. The purpose of community learning is to develop the skills, confidence, motivation and resilience of adults of different ages and backgrounds so they:
- 266.1. Progress towards formal learning or employment and/or
 - 266.2. Improve their health and wellbeing, including mental health and/or
 - 266.3. Develop stronger communities

267. The objectives set out in annex B ask you to widen participation and transform people’s destinies by supporting progression relevant to personal circumstances. We expect you to encourage and support all learners to progress onto new or more stretching provision to help progression into more formal learning or employment. We do not expect to see multiple enrolments on similar levels or learning aims where this does not benefit the learner’s development.
268. Community learning courses are delivered and reported on the ILR under the following 7 delivery strands which link to the objectives at annex B:
- 268.1. Engaging and/or building confidence
 - 268.2. Preparation for further learning
 - 268.3. Preparation for employment
 - 268.4. Improving essential skills (English, including English for Speakers of Other Languages (ESOL), maths and digital provision)
 - 268.5. Equipping parents/carers to support children’s learning
 - 268.6. Health and well-being
 - 268.7. Developing stronger communities

Non-formula community learning funding

269. The funding allocated to support non-formula funded community learning provision is included within your overall Combined Authority Adult Education Funding Allocation.
270. We expect the proportion of allocation utilised in support of non-formula funded community learning to fall in line with that proposed in your C&DP, however we will consider proposals to increase or decrease this proportion. If you wish to make such a change, please discuss and agree this with your Relationship Manager. Any changes are to be formally approved with the Combined Authority through an updated the Combined Authority Adult Education Funding C&DP Profile.
271. Providers are expected to work collaboratively to ensure that this flexibility is utilised in a coordinated manner. For example, providers should not all focus on a single community where one provider could engage learners on behalf of all. Equally, a resident engaged by one provider may be best supported by the provision offered by another. Providers are asked to present joint proposals which ensure the effective deployment of flexibility and associated resource.
272. Flexible utilisation of Community Learning relates to the following priority types of individuals who:

- 272.1. Have been unemployed or economically inactive for 6 months or more prior to enrolment
 - 272.2. Are unemployed and aged 50 or above
 - 272.3. Have an income that falls below the Real Living Wage
 - 272.4. Have prior attainment below full level 2
 - 272.5. Have literacy, numeracy or ESOL needs assessed to be below level 2
273. The Combined Authority reserves the right to reconcile any funds that are transferred into Learner Support or Community Learning which are not fully utilised, where it has not been used for community learning, or where its use cannot be evidenced.
274. You must attribute costs for eligible learners, up to the value of your non-formula community learning allocation. This must include the use of this funding to cover learning and learner support costs. If you do, you must:
- 274.1. claim for learning and learner costs through the final monthly claim report, following the policy in line with the support funding section
 - 274.2. record these costs in the learner's evidence pack and maintain evidence that support the costs for audit purposes
275. You can use your Combined Authority Adult Education Funding to deliver non-regulated provision that may be similar to community learning and/or regulated qualifications to meet local demand. If you do, you must:
- 275.1. follow the Combined Authority Adult Education Funding formula-funded methodology and submit ILR data under funding model 35
 - 275.2. enrol learners following the Adult Education Funding eligibility requirements, and you must **not** use your community learning local fee remission policy
276. You can support learners aged under 19 if they meet both of the following:
- 276.1. they are a parent, carer or guardian attending provision delivered through family learning, and
 - 276.2. are funded through non-formula community learning using funding model 10 in the funding model field (refer to ILR guidance for information)
277. When considering distributing your allocation flexibly across the Adult Education Budget funding lines (such as adult skills, community learning and learners support), the proposed use of funds must represent good value for money, and we may require you to provide information on your delivery where it does not do so.

278. When providers are not already delivering through Community Learning for the Combined Authority, any proposed utilisation of this funding methodology may only be used where:
- 278.1. It is on a strictly not-for-profit basis in line with actual evidenced eligible costs, and
 - 278.2. It is not in support of purposes that do not fall within the Combined Authority Community Learning Objectives 2023/24, and
 - 278.3. It is in support of the Priority Residents (Employed and Unemployed).
279. Community Learning Methodology may not be used to support the following ring-fenced initiatives, which must be supported by Adult Skills funding:
- 279.1. Sector Based Work Academies
 - 279.2. National Skills Fund Level 3 Entitlement / Free Courses for Jobs
280. This funding must also not be used for learning that is eligible for funding through an advanced learner loan.

Pound Plus and local fee remission policy

281. You must have in place a ‘Pound Plus’ policy - the ‘Pound’ represents the public pound, and the ‘Plus’ is everything else you can generate in addition to non-formula community learning funding allocation. This includes fee income, funding from other sources, resources in kind and other sources of revenue/sponsorship/volunteering. You must invest Pound Plus fee income and/or savings for those who are most in need of, and can least afford, community-learning provision.
282. You must also have in place, and operate, a fair and transparent community learning local fee remission policy that requires individuals to pay a course/ tuition/ joining fee, but also sets out clear eligibility criteria for those who, due to their circumstances, qualify for either partial or total fee remission.
283. Your Pound Plus and Local Fee remission policies must be available on your website and/or in the venues you deliver community learning to eligible learners. If requested, your Local Fee Remission Policy should also be shared with your Combined Authority AEB Relationship Manager.

Partnership working

284. Partnership working underpins the community learning objectives and is critical to developing and delivering an effective community-learning offer in a given locality.
285. You must engage and work closely with a wide range of relevant partners, the Combined Authority, and stakeholders in your local area to help shape your community learning offer to engage specific groups. These could include specialist partners and voluntary and community sector (VCS) organisations.
286. We expect you to work with other providers in your local area, who may be in receipt of non-formula community funding. We expect you to develop a strategic, efficient community-learning offer to reduce duplication of courses in a locality, and signpost learners to other partners as and when appropriate.

Prince's Trust Team Programme

The Prince's Trust Team Programme is a 12-week course designed to improve confidence, motivation, and skills for eligible 16 to 25-year-old. Each 'team' recruits a mix of 16 to 25-year-old of different abilities and backgrounds, including employees sponsored by their employer. Providers in partnership with the Prince's Trust run and manage it on a local basis.

287. In order to deliver the team programme, you must get approval from the Prince's Trust.
288. For eligible West of England learners aged 19 to 25, the Combined Authority will fund the team programme through the Combined Authority's adult funding methodology. Please also refer to the Prince's Trust section in the [Adult Education Budget Funding Rates and Formula 2023 to 2024 document](#).
289. For eligible learners aged 16 to 19, the team programme is funded by ESFA through their young people's funding methodology.

Support funding

290. The overarching aim of our adult education budget is to promote inclusive and sustainable economic growth. Given this, we maintain a significant focus on our most disengaged and disadvantaged residents, many of whom require

additional support to participate in, be retained on, succeed and progress from our provision to a positive destination.

291. Where you identify that a learner has a learning difficulty and/or disability, or a financial barrier, your Combined Authority Adult Education Funding allocation enables you to claim learning support and/or learner support funding to meet the additional needs of learners.

Learning support

292. Learning support is available to meet the cost of putting in place a reasonable adjustment, as set out in the Equality Act 2010, for learners who have an identified learning difficulty and/or disability, to achieve their learning goal.
293. Learning support must not be used to deal with everyday difficulties that are not directly associated with a learner's learning on their programme.
294. In relation to learning support, you must:
- 294.1. carry out a thorough assessment to identify the support the learner needs, and agree and record the outcome of this in the evidence pack
 - 294.2. record all outcomes on the evidence pack, and keep all evidence of the assessment of the needs, planned and actual delivery
 - 294.3. report via the ILR that a West of England learner has a learning support need associated with an identified learning aim by entering code LSF1 in the 'Learning Delivery Funding and Monitoring' field and entering the applicable dates in the 'Date applies from' and 'Date applies to' fields
 - 294.4. complete the record within 3 months from the activity or expenditure
295. Learning support at the fixed monthly rate can be reported via the ILR. You must report all learning support, including that at the fixed monthly rate, via the Monthly Claim Report, and you must keep evidence of these costs.
296. Learning support can be claimed where learning continues past the planned end date if the learner needs continued support to complete their programme.

Exceptional learning support claims above £19,000

297. If a learner aged 25 or over needs significant levels of support to start or continue learning and has support costs of more than £19,000 in a funding year, you can claim exceptional learning support (ELS).

298. Learners aged 19 to 24 who require significant levels of support should have an EHCP provided by, and therefore access funding from, their local authority. To claim ELS for a learner aged 19 to 24, you must confirm why the individual does not have such a plan, and this should be in the form of a letter or email from the relevant local authority stating the reasons(s) why the individual does not need an EHCP plan.
299. You must submit ELS claims at the beginning of the learner's programme or when you first identify the learner requires support costs of more than £19,000 in a funding year by formally notifying your Relationship Manager.

Learner Support

300. Learner support is available to provide financial support for learners with a specific financial hardship preventing them from taking part/continuing in learning. Before you award support to a learner, you must identify their needs within the following 'categories':
- 300.1. Hardship funding - general financial support for financially disadvantaged learners to support participation in learning
 - 300.2. 20+ childcare funding - for learners aged 20 or older on the first day of learning who are at risk of not starting or continuing learning because of childcare costs.
 - 300.3. Residential Access funding - to support Combined Authority funded AEB learners where they need to live away from home to access provision
 - 300.4. ICT devices and connectivity - to support disadvantaged learners who cannot undertake online delivery
 - 300.5. Mental Health Support - targeted financial support to enable learners who are at significant risk of withdrawal and / or non-achievement due to significant mental health issues
301. You must not claim more than 5% of your total learner support final claim as administration expenditure. You must document your process for managing your administration costs over the current funding year and record, report and retain evidence on spending for each of the categories. You must follow these rules and claim learner support using the Combined Authority Monthly Claim Report. You must:
- 301.1. Have criteria for how you will administer and distribute your funds, which must reflect the principles of equality and diversity and be available to learners and to us on request
 - 301.2. Assess and record the learner's needs, demonstrating the need for support, and retain this information in the evidence pack

- 301.3. Report the appropriate Learner Support Reason codes in the ‘Learner Funding and Monitoring’ fields in the ILR
 - 301.4. Complete the Combined Authority Monthly Claim Report on an ongoing basis, including a signed final claim report at R14
 - 301.5. Consider the availability of other support for learners, for example from Jobcentre Plus and the Flexible Support Fund to pay for sought after interventions such as CSCS cards which are not fundable (directly or indirectly) via the Combined Authority Adult Education Budget
 - 301.6. Make it clear to learners it is their responsibility to tell the Department for Work and Pensions about any learner support they are receiving from you, as such payments may affect their eligibility to state benefits
 - 301.7. Consider the most appropriate learner support fund to draw from where a learner is receiving the Combined Authority AEB funding from us as well as an ESFA Advanced Learner Loan
302. You must not use learner support funds for any of the following:
- 302.1. Essential equipment or facilities if the learner is eligible to full funding with the exception of the items covered in the first clause of the hardship section and the flexibilities in ICT devices and connectivity section. However, these learners can get support funding for childcare, transport, and residential costs
 - 302.2. A learner in custody or released on temporary licence
 - 302.3. A learner carrying out a higher education course or learning aims fully funded from other sources
 - 302.4. To pay weekly attendance allowances or achievement and attendance bonuses
 - 302.5. To fund courses, licences and other interventions that are not directly eligible for funding within the normal AEB funding methodology and / or have been explicitly excluded from AEB funding
 - 302.6. Any activity that supports purposes other than facilitating the individual learner’s participation, achievement, and progression within the Combined Authority adult education provision
303. The Combined Authority is willing to consider proposals from providers to utilise a greater proportion of their allocation as learner support in order to facilitate key interventions such as IT equipment loans or increased investment in mental health support.
304. We want to encourage and support providers to deliver more classroom-based provision within deprived communities and the workplace, and as such we are willing to offset the additional costs associated with such delivery to

make it as financially viable as direct delivery from existing premises. We will therefore permit providers to utilise learner support funding to offset increased delivery costs. The following rules will apply to this flexibility:

- 304.1. Providers may utilise up to 5% of their learner support funding to support such expenditure at their own initiative. Expenditure above this may be granted by the AEB team but this must be agreed in advance of delivery.
- 304.2. This flexibility may not be used to support delivery within your existing estate or in locations easily accessible from within your existing estate.
- 304.3. For delivery within deprived communities, the delivery location should be located in or within 15 minutes walking distance of a local super output area that falls within the 3 most deprived deciles, as identified by the Indices of Multiple Deprivation 2019.
- 304.4. The Combined Authority may agree to other delivery locations, but these must be approved in advance by the Combined Authority.
- 304.5. Delivery on employer premises may take place in any location that is owned and / or used by the employer.
- 304.6. This flexibility may not include any form of employer incentive payment.
- 304.7. Provision delivered should not include low priority provision unless agreed with the Combined Authority in advance of delivery.
- 304.8. This flexibility may support the actual costs of remote delivery only.
- 304.9. Providers should retain evidence of actual costs for audit purposes.

Hardship

305. You can use hardship funds for any of the following:
 - 305.1. Course-related costs, including course trips, books, and equipment (where costs are not included in the funding rate)
 - 305.2. Support with domestic emergencies and / or emergency accommodation provided by others, or by providing items / services / cash direct to the learner in the form of a grant or repayable loan provided by you
 - 305.3. Transport costs (but not make a block contribution to post-16 transport partnerships or routinely fund transport costs covered in the Local Authority's legal duty for learners of sixth-form age)
 - 305.4. Examination fees
 - 305.5. Accreditation fees, professional membership fees and any fees or charges due to external bodies
 - 305.6. Your registration fees
306. In exceptional circumstances, you can use hardship funds to assist with course fees for learners who need financial support to start or stay in learning.

307. If an asylum seeker is eligible for provision, you may provide learner support in the form of course books, equipment, cash payments or a travel pass.

20+ Childcare

308. You can only use childcare funding to pay for childcare with a childminder, provider or agency registered with Ofsted. You must not use this funding to:
- 308.1. fund informal childcare, such as that provided by a relative
 - 308.2. set up childcare places or financially contribute to the costs of a crèche
 - 308.3. fund childcare for learners aged under 20 on the first day of learning;
- instead, you must direct them to the ESFA' s 'Care to Learn' programme
309. You must not use childcare for those aged 20 years or older to top up childcare payments for those receiving 'Care to Learn' payments.

Residential access funding

310. You can use residential access funding to support Combined Authority funded AEB learners where they need to live away from home, for example to access specialist provision which involves a residential element or to support learners who cannot access provision locally. You must:
- 310.1. set out the criteria and procedures for considering and agreeing applications for support from your residential access funds
 - 310.2. only pay for travel costs for learners who are awarded residential access funding in exceptional circumstances
 - 310.3. only claim residential access funding for the period the learner is resident, either in accommodation you own or manage or other accommodation you have agreed to fund in line with your criteria
 - 310.4. ensure costs claimed represent value for money for the local area
 - 310.5. publish your rates where you have your own residential facilities

ICT devices and connectivity

311. You can support disadvantaged learners undertaking classroom or blended learning to continue to participate via online learning where they do not have:
- 311.1. internet access at home, and/or
 - 311.2. a suitable device, for example a laptop or tablet, to complete the necessary online course work

312. You must secure value for money when purchasing IT devices and/or internet access including:
- 312.1. deploying any unused devices before you purchase new ones
 - 312.2. exploring options to access low cost second hand or recycled devices
 - 312.3. avoiding entering long term contract arrangements
 - 312.4. holding a record of actual costs for any IT devices and/or internet access bought for this purpose and make this available to us, if asked
313. IT devices you purchase must only be loaned out to learners and returned at the end of their learning aim to allow them to be re-used by other learners. Learners must sign a declaration, confirming:
- 313.1. they will return the device when their online learning aim(s) is complete, or if they leave before completing their learning
 - 313.2. they will return the device in the same condition they received it
314. You must maintain an up-to-date record of the loan and return of devices.
315. You must record the following evidence in the learner's evidence pack:
- 315.1. the outcome of the assessment undertaken to identify the learner's individual needs
 - 315.2. the learner declaration referred to above

Job outcome payments

316. For fully funded Adult Skills learners who are unemployed, we will pay 50% of the achievement payment if they start a job before achieving the learning aim. If the learner then achieves the learning aim, we will pay the remaining achievement payment. The following conditions apply:
- 316.1. The learner must provide you with evidence through a declaration that they have a job for at least 16 hours a week for four consecutive weeks
 - 316.2. Where the learner was claiming benefits relating to unemployment, they must also declare that they have stopped claiming these.

Section 3 - Payments and performance management

Rules that apply to all Providers

317. This section sets out the principles by which we will manage your performance in the 2023 to 2024 funding year and should be read in conjunction with the 2023/24 the Combined Authority Performance Management Framework Policy.
318. In 2023/24, the West of England Combined Authority will utilise the current ESFA ILR and the Combined Authority Monthly Claim Report to calculate and monitor a provider's spend against their Combined Authority AEB allocation.
- All providers in receipt of a 2023/24 Funding Agreement with the Combined Authority will have been allocated funds to implement their C&DP.
319. The Combined Authority will pay in line with the agreed Payment Profile in the C&DP and GFA. Any changes in year must be via a Grant Funding Variation.

Table 1 - Payment Profile Template

UKPRN	Profile Type	Data Item Group	Profile	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	TOTAL (£)
	Funding	All	Total													
	Funding	Learners	<i>of which</i> Priority: Unemployed													
	Funding	Learners	<i>of which</i> Priority: Employed													
	Funding	Learners	<i>of which</i> Low Priority													
	Funding	Initiatives	<i>of which</i> National Skills Fund Level 3													
	Funding	Initiatives	<i>of which</i> Green Skills													

320. We will use our approach to funding to ensure learning provision is of a high quality. We will use your track record to assess your ability to deliver education and training to the required standard. Your record of accomplishment will include, but will not be restricted to, Ofsted judgements, self-assessment judgements, minimum quality standards, financial health, financial management and control and previous delivery against your funding agreements (both the Combined Authority and ESFA), where this information is available. Additional aspects of your delivery will also be monitored and reviewed and are detailed in the Combined Authority Performance Management Framework 2023/24.
321. As part of our financial assurance work, we will continue to monitor compliance with the funding rules. We will contact you where we identify you have submitted data that does not meet our funding rules and ESFA ILR requirements. We will require you to correct inaccurate ESFA ILR, the Combined Authority Monthly Claim Report or to adjust your final funding claim.
322. All providers must submit ILR data on all ILR submission dates from R01, and Monthly Claim Reports to the Combined Authority on the specified deadlines (or confirm a nil return if provision has not yet started). The funding claims must include adult skills, non-formula funded community learning and learner support funding. The Combined Authority requires data to be submitted in a timely manner and therefore expects providers to comply with the following timescales:
- 322.1. Enrolments should be visible in the ILR no later than 2 months after the learning start date
 - 322.2. Withdrawals should be visible in the ILR no later than 2 months after the last date of attendance
 - 322.3. Achievements should be visible in the ILR no later than 3 months after the actual end date
 - 322.4. Progressions should be visible in the ILR no later than 3 months after the last date of attendance
323. You must provide a forecast to the Combined Authority for the remainder of the funding year as and when requested. The forecasts provided must be robust, based on current / historic performance patterns combined with current intelligence, and not simply an assertion of full allocation delivery that is inconsistent with evidence.
324. In-year, we will review the actual spend you submit in your funding claims against the ESFA ILR for West of England residents and the Monthly Claim Report.
325. In addition to the above, all provider payments will be reconciled at the end of the funding agreement period against the 2023/24 provider allocation, and this will occur following receipt of the provider's R14 ILR return. We reserve the right to

recover any underspend below the full Combined Authority Adult Education Funding 2023/24 allocation, as well as the right to re-base any allocation offered that relates to delivery in the 2023/24 academic year. Reconciliation does not include payment for over-delivery, as total provider payments are capped to the value of your funding allocation.

326. Delivery performance will be monitored throughout the funding agreement period to determine provider Combined Authority Adult Education Funding earnings against their agreed payment profile as set in the GFA.
327. At key performance management points, a provider's earnings against profile will be reviewed and analysed.
328. The Combined Authority shall be entitled to re-profile, reconcile, or cease payments, cease recruitment of new Learners and/or delivery of provision by the Provider to existing learners at the Combined Authority's discretion and subject to the terms of the GFA.
329. Any provider with an identified funding under performance which is not recovered at any of the performance management points must work with their Combined Authority AEB Relationship Manager and submit a plan to the Combined Authority outlining how they intend to address the under delivery.
330. Your funding agreement will state the maximum amount of the Combined Authority Adult Education Funding provision you can deliver between 1 August 2023 and 31 July 2024. There will be no funding payment in relation to over delivery against the provider's C&DP unless agreed with and confirmed by the Combined Authority in writing prior to an increase above the funding level detailed. This excludes National Skills Fund Level 3 Offer.
331. In extenuating circumstances, where the recovery of unspent West of England Adult Education Funding will result in a negative strategic or economic impact on either the learner, community, or provider, the Combined Authority may consider a longer-term recovery arrangement with the provider. This decision will be based on robust evidence of improvements in future performance and the continued delivery of high-quality provision for West of England residents.
332. Where the overpayment cannot be recovered from future payments within the Financial Year, the Combined Authority will invoice the Provider for the remaining debt and the Provider would normally pay within 30 days. In extenuating circumstances, we may agree to payments in instalments over a longer period.
333. Your funding agreement will span 2 financial/fiscal years:

333.1. August 2023 to March 2024: periods 1 to 8 of the 2023 to 2024 funding year

333.2. April 2024 to July 2024: periods 9 to 12 of the 2023 to 2024 funding year

334. Funds cannot be 'vired' between funding agreements with the Combined Authority and the ESFA. Funding also cannot be vired between your core allocation and any additional growth funding allocated in support of specific priorities, unless agreed in advance through the approval of an updated C&DP.

335. Your Combined Authority Adult Education Funding allocation can be used to fund new starts, continuing learners, non-formula funded community learning (where applicable to you) and learner support.

Annex A: Eligibility for funding

This Annex sets out the countries falling within the below categories as referenced in the residency eligibility section.

British Overseas Territories

- Anguilla
- Bermuda
- British Antarctic Territory
- British Indian Ocean Territory
- British Virgin Islands
- Cayman Islands
- Falkland Islands
- Gibraltar
- Montserrat
- Pitcairn, Henderson Island, Ducie and Oeno Islands
- South Georgia and the South Sandwich Isles
- St Helena and its dependencies (Ascension and Tristan da Cunha)
- Turks and Caicos Islands

EEA

The EEA Comprises of the following countries:

- All Member States of the European Union (a list of member states can be accessed on the EU website)
- With respect to EEA nationality, note that any Cypriot national living on any part of the island qualifies for EU residency and is considered an EU national
- Iceland
- Lichtenstein
- Norway

Table below lists territories that are categorised as being within the EU and / or part of the listed countries such that they satisfy our residency requirements for the purposes of the AEB funding rules.

	Territories	
Country	Part of the specified country only:	Part of the specified country and the EU:
Denmark	<ul style="list-style-type: none"> • Greenland • Faroe Islands 	
Finland		<ul style="list-style-type: none"> • Aland islands
France	<ul style="list-style-type: none"> • New Caledonia and its dependencies French Polynesia • Saint Barthélemy 	<ul style="list-style-type: none"> • the French Overseas Department (DOMS) (Guadeloupe, Martinique, French Guiana (Guyana), Reunion and Saint-Pierre et Miquelon)
Germany		<ul style="list-style-type: none"> • Tax-free port of Heligoland
Netherlands	<ul style="list-style-type: none"> • Antilles (Bonaire, Curacao, Saba, St Eustatius, and St Maarten) • Aruba 	
Portugal		<ul style="list-style-type: none"> • Madeira • The Azores
Spain		<ul style="list-style-type: none"> • the Balearic Islands • the Canary Islands • Ceuta • Melilla

To note: Andorra, Macau, Monaco, San Marino, and the Vatican are not part of the EU or the EEA.

Annex B - Community Learning Objectives

- Focus public funding on people who are disadvantaged and least likely to participate, including in rural areas and people on low incomes with low skills
- Collect fee income from people who can afford to pay and use where possible to extend provision to those who cannot
- Widen participation and transform people's destinies by supporting progression relevant to personal circumstances, including:
 - improved confidence and willingness to engage in learning
 - acquisition of skills preparing people for training, employment, or self-employment
 - improved digital, financial literacy and/or communication skills
 - parents/carers better equipped to support and encourage their children's learning
 - improved/maintained health and/or social well-being
- Develop stronger communities, with more self-sufficient, connected, and pro-active citizens, leading to:
 - increased volunteering, civic engagement, and social integration
 - reduced costs on welfare, health, and anti-social behaviour
 - increased online learning and self-organised learning
 - the lives of our most troubled families being turned around
- Commission, deliver and support learning in ways that contribute directly to these objectives, including:
 - bringing together people from backgrounds, cultures, and income groups, including people who can/cannot afford to pay
 - using effective local partnerships to bring together key providers and relevant local agencies and services
 - devolving planning and accountability to neighbourhood/parish level, with local people involved in decisions about the learning offer
 - involving volunteers and Voluntary and Community Sector groups, shifting long term, 'blocked' classes into learning clubs, growing self-organised learning

groups, and encouraging employers to support informal learning in the workplace

- supporting the wide use of online information and learning resources
- minimising overheads, bureaucracy & administration
- The Combined Authority expects providers accessing community learning funding to engage with smaller community-based organisations and partly deliver adult education provision through them in order to widen participation (especially amongst under-represented groups) and develop the capacity and enhance the resilience of the community-based organisation.
- Directly engage with disadvantaged communities (either geographic or communities of interest) to establish a robust understanding of the specific barriers that prevent residents from engaging in learning and / or progressing into employment.
- Work directly with disadvantaged residents to promote and incentivise their reengagement and recruit them onto appropriate adult education provision.

Glossary of terms

Term	Definition
20+ childcare	A category of learner support to assist learners aged 20 or over who are at risk of not starting learning or leaving learning due to issues in obtaining childcare.
Adult funding methodology	The funding methodology for individuals aged 19 and over, participating in AEB learning. You can access adult funding methodology on the GOV.UK website.
Advanced learner loan	Advanced learner loans are available for individuals aged 19 or above to undertake approved qualifications at levels 3 to level 6, at an approved provider in England. Advanced learner loans give individuals access to financial support for tuition costs similar to that available in higher education and is administered by Student Finance England.
Annual gross salary	Gross salary is the total income before any deductions are removed from that amount. This total income is usually described as an annual salary, and it is the total amount an employee will receive for work completed before tax of national contributions are deducted.
Break in learning	When a learner is not continuing with their learning but has told you beforehand that they intend to resume their learning in the future.
Care to learn	A Department for Education scheme to assist young parents under the age of 20 with the childcare costs that may form a barrier to them continuing in education.
Careers Education, Information, Advice and Guidance (CEIAG)	An intervention delivered by a qualified professional in line with MATRIX standards which is intended to support potential learners to make informed choices concerning their future learning and career pathways prior to enrolment, and to support progression to the next step on the learning and career pathway.
Combined Authority funded AEB	Funding you can claim from the Combined Authority for delivery of AEB eligible provision to individuals set out in the who we fund section.
Combined Authority Curriculum and Delivery Plan (C&DP)	Delivery plans for providers delivering funded AEB provision to Combined Authority residents. The Combined Authority will monitor the Provision as set out in the Providers C&DP against monthly claims.
Combined Authority Monthly Claim Report	The Monthly Claim Report is to be completed in parallel to the monthly ILR return, capturing details of both the data submitted via the ILR and the providers own understanding

Term	Definition
	<p>of actual delivery to date based on their own management information (which may not yet be fully visible within the ILR).</p> <p>We also ask providers to offer a forecast of whole year delivery and provide narrative concerning performance challenges, proposed changes and any issues arising that relate to quality, compliance, or due diligence.</p> <p>These offer additional mechanisms to bring emerging issues to the Combined Authority's attention and seek whatever support and / or flexibility is needed to manage these as effectively as possible.</p>
Community Learning	Helps people of different ages and backgrounds gain a new skill, reconnect with learning, pursue an interest, and learn how to support their children better, or prepare for progression to more formal courses / employment.
Components of regulated qualification	A subset of a qualification, which could be a unit.
Continuers / continuing learners	Learners who commenced learning in a previous funding year and remain in learning as of 1 August 2023.
Devolved Area Monitoring (DAM) codes	Issued for funding and policy changes implemented by the Combined Authority. An additional Technical Guidance Note will be made available to Providers. We will monitor use of all the DAM codes from the first data return, R01.
Digital Entitlement	The study of EDS qualifications for learners who have digital skills assessed at below level 1. Qualifications that are designated up to and including level 1 are essential digital skills and digital functional skills.
Direct costs of learning	Any costs for items without which it would be impossible for the learner to complete their learning aim. This can include the costs of registration, examination or any other activities or materials without which the learner cannot achieve their programme of study.
Distance learning	Learning delivered away from the learner's main place of employment or place of learning.
Education health and care (EHC) plan	An EHC plan replaces statements of special educational needs and learning difficulty assessments for children and young people with special educational needs. The Local Authority has the legal duty to 'secure' the educational provision specified in the EHC plan, that is, to ensure that the provision is delivered.

Term	Definition
European Economic Area (EEA)	The European Economic Area, abbreviated as EEA, consists of the Member States of the European Union (EU) and 3 countries of the European Free Trade Association (EFTA) (Iceland, Liechtenstein, and Norway; excluding Switzerland). The Agreement on the EEA entered into force on 1 January 1994. Please refer to Appendix A for more information.
Employment status (formerly employed)	The main types of employment status are; worker, employee, self-employed and contractor, director and office holder.
English for speakers of other languages (ESOL)	The study of English by speakers of other languages.
European social fund (ESF)	The ESF is a structural fund from the European Union. It improves the skills of the workforce and helps people who have difficulties finding work. The ESFA are a co-financing organisation for the ESF.
Evidence Pack	A collection of documents and information brought together to form a single point of reference relating to the learning that is taking place. This must provide evidence to prove the learner exists, is eligible for funding, the planned learning to be provided, and that learning has been delivered.
Exceptional learning support	Learning support funding to meet the costs of putting in place a reasonable adjustment for a learner who requires more than £19,000 in a funding year.
<u>Find a learning aim</u>	<u>Find a learning aim</u> provides online services to find the latest information on available qualifications, apprenticeship standards, T Levels, and units. Standards will show you information on funding, dates, and common components. Qualifications and units show you funding streams for courses and the last date learners can start.
Full level 2	The following qualifications are designated full at level 2: <ul style="list-style-type: none"> • General Certificate of Secondary Education in 5 subjects, each at grade 4 (C) or above • Technical Certificate at level 2 which meets or has previously met the requirements for 16 to 19 performance tables
Full level 3	The following qualifications are designated full at level 3: <ul style="list-style-type: none"> • General Certificate of Education at the advanced (A) level in 2 subjects

Term	Definition
	<ul style="list-style-type: none"> • General Certificate of Education at the Advanced Subsidiary (AS) level in 4 subjects • QAA Access to Higher Education (HE) Diploma at level 3 • Technical or applied general qualification at level 3 which meets or has previously met the requirements for 16 to 19 performance tables • Core maths qualification at level 3
Full or co-funding Indicator (FFI)	Indicates whether a learning aim is fully funded or co-funded in Adult Skills.
Functional skills	Applied practical skills in English, Maths and Digital that provide the learner with the essential knowledge, skills and understanding to enable them to operate effectively and independently in life and work.
Funding agreement	The agreement between the Secretary of State for Education acting through the Combined Authority and providers who receive funding for education and skills training.
Funding model (10 and 35)	Identifies the funding methodology we apply to submission of finalised ILR data. For AEB funding, Funding Model 10 (Community Learning) and 35 (Adult Skills) are used, noting model 10 is non-formula funded (meaning ILR data does not generate a funding rate and is paid on monthly profile) and model 35 is formula funded.
Funding year	The Combined Authority adult funding system operates on a funding year basis, which starts on 1 August and finishes on 31 July.
General Data Protection Regulation (GDPR)	The GDPR is a Europe-wide law that replaced the Data Protection Act 1998 in the UK and sets out requirements for how organisations have to handle personal data. It is part of the wider package of reform to the data protection landscape that includes the Data Protection Act 2018.
Guided learning	<p>As defined by Ofqual: “The activity of the learner in being taught or instructed by - otherwise participating in education or training under the immediate guidance or supervision or - a lecturer, supervisor, tutor or other appropriate provider of education or training. For these purposes the activity of ‘participating in education and training’ shall be treated as including the activity of being assessed if the assessment takes place under the immediate guidance or supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training.”</p> <p>You can find more information in the Ofqual Handbook.</p>

Term	Definition
Hardship	Within learner support, a category of support to assist vulnerable and disadvantaged learners to remove barriers to education and training.
Individualised learner record (ILR)	The primary data collection requested from learning providers for further education and work-based learning in England. The government uses this data to monitor policy implementation and the performance of the sector. It is also used by organisations that allocate funding for further education. In 2023/24, the Combined Authority will continue to utilise the ESFA ILR to record all outputs for West of England residents. All providers delivering the Combined Authority AEB must complete all relevant ILR details and send this to the ESFA. The ESFA will then validate the provider's data and forward the Combined Authority the ILR for West of England residents.
ILR specification	The ILR Specification is the technical documents, guidance and requirements to help providers collect, return and check ILR and other learner data.
Initial assessment and diagnostic testing	A pre-enrolment holistic assessment to identify the specific barriers which impact on the potential learner's ability progress through their planned learning and career pathway intended to ensure that the right learner is enrolled on the right course (in terms of both subject and level) and to identify any additional support needs which the provider may need to address. This may include specific diagnostic tests such as BKSB where relevant.
Job outcome payments	Payments made for learners who are unemployed at the start of learning who cease learning to take up a job.
Learner residency	We use the term 'resident' or 'residence' in this document for different purposes. Residence in the UK, EU and EEA has specific definitions in education law, and is set out in the 'residency eligibility' section. Following the devolution of adult education functions, there is a new emphasis on residence in England, in determining and evidencing eligibility for Combined Authority funded AEB - see 'who we fund' and 'evidence' sections. This means permanent residency of an individual in the Combined Authority (i.e., not a temporary address for duration of learning taking place), immediately prior to enrolment determines eligibility for ESFA funded AEB.
Learners in receipt of low wage	You may fully fund learners who are employed, or self-employed, up to and including level 2 where you are satisfied that the learner is both:

Term	Definition
	<ul style="list-style-type: none"> • eligible for co-funding, and • earns less than £23,400.00 annual gross salary <p>The threshold of £23,400 as an annual gross salary, is based on the Real Living Wage (23 and over hourly rate) of £12.00 announced on 24th October 2023, on the assumption of a 37.5-hour contract with paid statutory holiday entitlement (therefore, £12.00 multiplied by 37.5 hours per week, multiplied by 52 weeks per year).</p> <p>Providers will need to check they are applying the correct rate following the annual change at https://www.livingwage.org.uk/</p>
Learner support	Funding to enable providers to support learners with a specific financial hardship that might prevent them from being able to start or complete their learning.
Learning aim	A regulated or unregulated qualification which is approved for the Combined Authority adult education funding and has a Learning Aim reference listed on 'Find a Learning Aim' (including aims which relate to Community Learning).
Learning aim reference number	The unique eight-digit code used to identify a specific learning aim.
Learning delivery monitoring (LDM)	A code used as part of the ILR to indicate participation in programmes or initiatives.
Learning planned end date	The date entered onto the individualised learner record (ILR) when the learner is expected to complete their learning.
Learning support	Funding to enable providers to put in place a reasonable adjustment, set out in the Equality Act 2010 , for learners with an identified learning difficulty and/or disability to achieve their learning goal.
Legal entitlement	<p>The legal entitlement to education and training allows learners to be fully funded who are aged:</p> <ul style="list-style-type: none"> • 19 and over, who have not achieved a grade 4 (legacy grade C), or higher, and study for a qualification in English or maths up to and including level 2, and/or • 19 to 23, if they study for a first qualification at level 2, and/or level 3 • 19 and over, who have digital skills assessed at below level 1.
Local flexibility	Regulated qualifications, and or their components, and non-regulated learning that the Combined Authority funds, that is not part of the English and maths, or level 2 or

Term	Definition
	level 3 legal entitlement offer. All regulated and non-regulated learning that is available for funding through the flexible local offer is listed on Find an aim
Non-regulated learning	<p>Learning which is not subject to awarding organisation external accreditation in the form of a regulated qualification. It may be designed, delivered, and certificated by a provider or another organisation. This could include:</p> <ul style="list-style-type: none"> • independent living skills and engagement learning • employability and work skills • labour market re-entry • technical education tasters • basic digital skills • community learning
Normally resident	This refers to their primary residence as opposed to temporary accommodation used solely for the purposes of securing eligibility for funding.
Occupational Standard	The requirements for competence in the duties of an occupation which are approved and published by the IATE. They include knowledge, skills, and behaviours.
Ofqual	The Office of Qualifications and Examinations Regulation , which regulates qualifications, examinations, and assessments in England.
Personal learning record (PLR)	An ESFA database that allows individual learners access to their past and current achievement records. These can be shared with schools, colleges, further education training providers, universities, or employers.
Performance Management Framework (the Combined Authority)	The Combined Authority management framework detailing how providers will be managed and monitored from both a range of perspectives including quality performance (direct and third-party delivery) and earnings against profile.
Performance Management Points (the Combined Authority)	Key points during the funding agreement when the Combined Authority will review earnings against profile and apply a specification as detailed in this policy to ascertain if the provider is underperforming against their Combined Authority allocation.
Progress review	A regular assessment, conducted in discussion with the learner and any other relevant parties which consider how well they are progressing through the programme of learning and support and considers whether any further additional support is required and / or interventions are required to promote retention, achievement, and

Term	Definition
	progression. The frequency of the review should be proportionate to the duration of the qualification and the risk of withdrawal, non-completion and non-progression relating to the individual learner.
Progression support	Interventions intended to increase the likelihood that the learner will move forward on their learning and career pathway following the completion of the Combined Authority funded programme of learning and support. This may include (but is not limited to) further CEAlG, job search, support with application completion and where necessary a managed transition to the progression destination to ensure that the progression is secure. The provider may use relevant funded learning aims to support this.
Recognising and Recording Progress and Achievement (RARPA)	The Learning and Work Institute have published <u>updated RARPA Guidance</u> . This comprises a clear framework designed to support learners through the learning process, identifying key outcomes. It provides a robust approach to quality control and improvement of nonregulated provision with a focus on self-assessment that supports standards acceptable to the Office of Standards in Education (Ofsted). You can access further information from <u>The Learning and Work Institute</u> .
Recognition of prior learning (RPL)	An assessment method that considers whether a learner can demonstrate that they can: <ul style="list-style-type: none"> • meet the outcomes for a qualification or a component of a qualification through knowledge, understanding; or, • skills they already have and so do not need to undertake a course of learning for that component or qualification.
Regulated Qualifications Framework (RQF)	The RQF provides a way of understanding and describing the relative level and size of qualifications. The RQF, operated by Ofqual, is a single regulatory framework containing a range of general, technical, and professional qualifications.
Register of training organisations (the ESFA Register)	A register that provides assurance on organisations that deliver non-apprenticeship education and training services funded by the ESFA, or third-party with more than £100,000 in our non-apprenticeship supply chain. Organisations apply to enter the register by completing our market-entry pre-qualification process, which includes

Term	Definition
	due diligence questions and testing of capacity and capability.
Relationship Manager (the Combined Authority AEB)	Every provider approved to deliver AEB to West of England residents is assigned a Relationship Manager to support the provider to monitor the quality of delivery and performance against allocation and the funding agreement.
Residential Support	Support provided under learner support to learners receiving specialist provision, which involves a residential element, or to support learners who cannot receive provision locally.
Right of abode in the UK	Persons with the right of abode have the right to live and work in the UK. All British citizens have the right to abode, as well as some Commonwealth citizens.
Sector-based work academy programme (SWAP)	SWAP is a DWP scheme that offers pre-employment training, work experience placements and a guaranteed job interview for recipients of Jobseeker's Allowance (JSA), Universal Credit (all work-related requirements group) or Employment and Support Allowance.
Self-declaration	A process where the learner is able to confirm something through his or her own signature.
Senior responsible person	For example, Chief Executive, Managing Director, Principal or their equivalent.
Start of learning	The date on which learning begins. We do not consider enrolment, induction, diagnostic assessment, or prior assessment to be part of learning.
State benefits	State benefits are contributions, both financial and non-financial, made by central and local Government to individuals in certain circumstances to meet their day-to-day living needs.
Study programme	Study programmes are for learners aged 16 to 19 and cover all levels up to level 3. Funding is for each learner, rather than for each qualification and can only have one core aim at a time.
Subcontractor / Third Party Delivery	A separate legal entity that has an agreement with you to deliver any element of the education and training we fund. A separate legal entity includes companies in your group, other associated companies, and sole traders. It also includes individuals who are self-employed or supplied by an employment agency, unless those individuals are working under your direction and control, in the same way as your own employees.

Term	Definition
	The term subcontractor will also apply to any partnership work you have where your staff and/or provision is managed by another partner/institution. The Combined Authority will consider this a type of subcontracting arrangement and as such will require all relevant detail on your Delivery Plan for approval and review at relevant Performance Meetings. This arrangement must also be identified in the ILR using the Partner UKPRN Field.
Take home pay	An unemployed learner may also receive an income alongside their benefit claim. In order to be fully funded under the unemployed definition their “take home pay” (stated on the Universal Credit statement) is less than £617 a month (sole adult in their benefit claim) or less than £988 a month (joint benefit claim with partner).
UK provider reference number	A unique identifying number given to all providers by the UK register of learning providers.
Unique learner number	A 10-digit number used to match a learner’s achievement to their personal learning record (PLR).
Virement	The process of moving money from one financial account or part of a budget to a different one.
Work placement / experience	A placement with an employer in a workplace setting.
Young people’s funding methodology	The ESFA’s funding methodology for individuals aged 16 to 19 (and those aged 19 to 24 with an EHC plan). You can access this methodology on the GOV.UK website.

Summary of main changes

We have highlighted the main changes made in this document compared to the version published for 2022 to 2023 in the table below.

Please note this is not an exhaustive list of all changes. You must refer to the main document for the definitive rules, which apply to all providers of education and training who receive funding from the Secretary of State for Education acting through the Combined Authority.

If you have a specific query on the funding rules, please email your enquiry to Adulteducation@westofengland-ca.gov.uk or speak to your Relationship Manager.

Section	Reference	Change
All	-	We have made changes to wording, punctuation etc. to improve the clarity of the funding rules. These changes do not in themselves represent a change in the intent of the rules themselves.
Introduction and purpose of the document	2 (2022 / 2023)	Removed paragraph referring to “ <i>exceptional circumstances following Coronavirus (COVID-19).</i> ”
How this document can help you	9	Added reference to summary of main changes, and explanation of how this may be amended in year.
Principles of funding		Added confirmation that you must not transfer funding from devolved AEB funding to other budgets, in line with ESFA amendment for 2023/24.
We will fund	-	References to ‘young people’s funding methodology’ have been amended to ‘16 to 19-year-olds funding methodology’, in line with ESFA terminology.
Residency eligibility	38 - 41	Added sections for ‘Temporary residence in the UK for educational purposes’ and ‘Temporary absences from the UK’ (replaces ‘Learners temporarily outside of England’, paragraph 73 in 2022 / 2023).
Residency eligibility	42 - 44	Section on ‘Learners who have applied for an extension or variation of current immigration permission’ has been moved earlier in document (59 - 62 in 2022 / 2023 funding rules).

Residency eligibility	47	Section on 'UK nationals and other persons with right of abode' has been expanded to clarify the eligibility rights of family members.
Residency eligibility	49	Details on eligibility for UK nationals and their family members have been separated to clarify the differences in eligibility applicable.
Residency eligibility	-	References to 'EEA' now refer to 'EEA and Switzerland' where applicable.
Residency eligibility	-	Sections on 'family members of...' have been incorporated into the relevant countries where applicable.
Residency eligibility	-	References to 'Ireland' have been amended to 'Republic of Ireland'.
Joining family members under the EU Settlement Scheme	54 - 55 (2022 / 2023)	This section has been removed, with the relevant information incorporated into 'Family members of EU nationals' (6114).
Late applications to the EU Settlement Scheme	56 - 57 (2022 / 2023)	This section has been removed, as the closing date for applications was 30 June 2021 and fell two academic years prior to those these funding rules apply to.
Long residence	69 - 72	Added section on 'Long residence' within residency eligibility
What we will not fund	103 - 109, 74 - 78 (2022 / 2023)	'What we will not fund' has been moved later in the document from the previous funding rules.
Qualifying days for funding	93	Added clause regarding qualifying days that <i>"This does not apply where the learner achieves the learning aim."</i>
Recognition of prior learning (RPL)	96 (89 in 2022 / 2023)	<i>"Essential digital skills qualifications up to and including level 1"</i> is included as well as <i>"English and maths qualifications up to and including level 2"</i> .
Breaks in Learning attribute to coronavirus (COVID-19)	98 - 99 (2022 / 2023)	This section has been removed entirely.
Substantial Programme of Learning and Support	105 - 108 (2022 / 2023)	This section has been removed entirely following the simplification of funding for the 2023 / 2024 year.
Individualised Learner Record (ILR) and Combined	136 - 139 (132 - 134 in 2022 / 2023)	The 'Individualised Learner Record and the Combined Authority Monthly

Authority Monthly Claim Report		Claim and Risk Report' section in the 2022 / 2023 funding rules has now been separated into two distinct sections.
Individualised Learner Record (ILR) and Combined Authority Monthly Claim Report	135 - 138 (2022 / 2023)	Details on 'Categories' have been removed following the simplification of funding for the 2023 / 2024 year.
Priority Residents	140 - 151	New section replacing 'Categories' following the simplification of funding for the 2023 / 2024 year.
Provision and individuals we fund	156	Further details have been added regarding the fullness of qualifications.
Local Flexibility and Legal Entitlements	162 - 164	Section added for 2023 / 2024 in line with ESFA funding rules.
Priority Residents and Learners	162 (2022 / 2023)	This section has been removed entirely following the simplification of funding for the 2023 / 2024 year.
Learners in receipt of low wage	180.2.1	Further details have been added regarding how the low wage threshold is calculated.
Initiatives	-	The order of the 'Initiatives' section has been reordered for both clarity and consistency with ESFA funding rules.
Residential access funding	310	Section added for 2023 / 2024 in line with ESFA funding rules.
ICT devices and connectivity	311 - 315	Section added for 2023 / 2024 in line with ESFA funding rules.
Glossary of terms	-	Terms have been updated in line with changes made.
Level 2 and level 3 qualification list Annex C	-	Removed all reference to Level 2 and 3 qualification list (Annex C)
Update to Real living wage		Updated all references to Real Living Wage from £10.90 to £12 per hour