

Office for
Students

The logo for the Office for Students, featuring a dark blue square with a yellow square in the top right corner containing the letters 'OfS' in white.

OfS

HESES23 training

Essential updates for experienced staff

Roger Lear
Funding Officer

Ross Lawlor
Head of Funding Operations

12 September 2023

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Webinar housekeeping

- Who is presenting today:
 - Host: Roger Lear (backup host – Will Awad)
 - Ross Lawlor, Head of Funding Operations at the Office for Students (OfS)
- Closed captions are available – click the CC icon
- A recording of this session will be available on the OfS website
- Intended audience: provider staff with previous knowledge of HESES
- How to ask a question:
 - please use Q&A rather than ‘chat’
 - use ‘chat’ box to communicate with our events team
- Please let us have your feedback.

Today's session

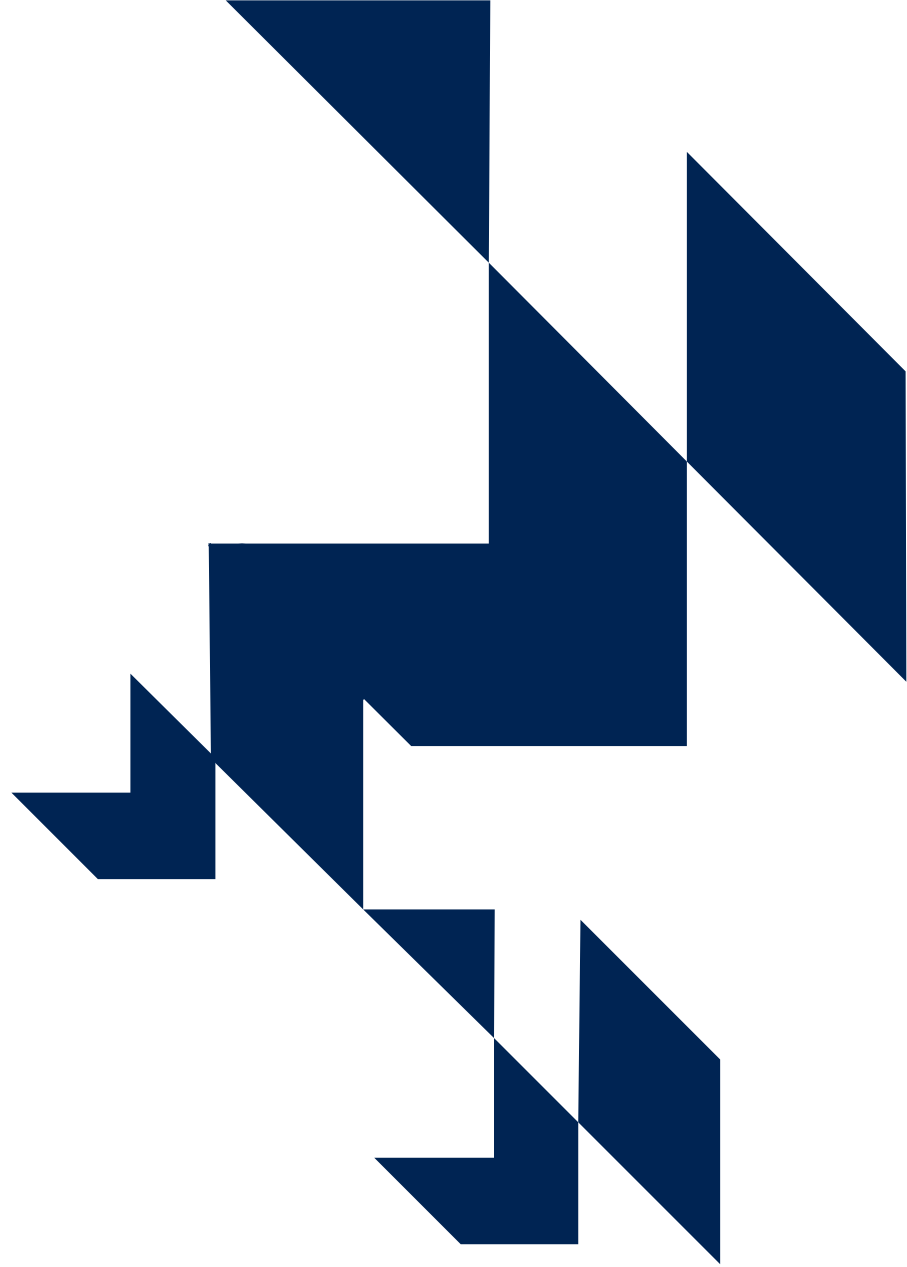
- Format
 - Presentation by Ross Lawlor, Head of Funding Operations at the OfS
 - Questions and answers.
- Your questions
 - Changes to HESES and policy issues related to them
 - Batched wherever possible
 - May take offline if that is more suitable
 - Questions that are very specific to a particular provider should be sent to HESES@officeforstudents.org.uk.



Supporting materials

- A recording of this event and today's slides will be available from the OfS website at officeforstudents.org.uk/events
- Providers should also refer to:
 - HESES website: officeforstudents.org.uk/heses
 - will include model HESES23 workbooks
 - 'How to complete the HESES23 workbook' publication
 - HESES23 – Higher Education Students Early Statistics survey 2023-24 publication
 - aka 'The HESES guidance document': to be published imminently
 - 'Guide to funding 2023-24' publication – search for 'OfS 2023.32' on our website
 - HESES videos on the OfS YouTube channel: youtube.com/officeforstudents

Changes to data collection for HESES23



HESES23 – the basics

Deadlines:

- Submission deadline – noon on:
 - FECs: 13 November 2023
 - All other providers: 11 December 2023
- Sign-off deadline – 31 January 2024 for all providers

HESES23 guidance document:

- To be published on 14 September

'Beginners' webinars:

- 19 and 21 September, see the events pages on the OfS website

Overview of changes for HESES23

Changes were announced in OfS 2023.33 (July 2023). In HESES23 we are:

- now counting ‘years of engagement’, ‘not years of instance’
- no longer requiring estimates of non-completion or FTE
- not collecting separate information on years taken as part of a degree apprenticeship
- collecting data on the number of years on courses that lead to an HTQ
- removing the requirement that a year must have a minimum FTE of 0.03

I will also talk about how we will use HESES23 to inform our funding methods for 2024-25.

Years of engagement – background to changes

- DDB Student record now using the data futures specification
- ESFA's ILR has not changed
- Differences between the data futures model, the ILR & previous HESES definitions
- Data futures – returns data on a student course session (SCS) basis
- ILR and old HESES – returns data on a 'year of instance' basis

Options for HESES23:

1. Return using years of instance
2. Return using student course sessions
3. Return using years of engagement

Years of engagement – definitions

Engagements can be divided into ‘years of engagement’ for HESES purposes years of engagement are defined:

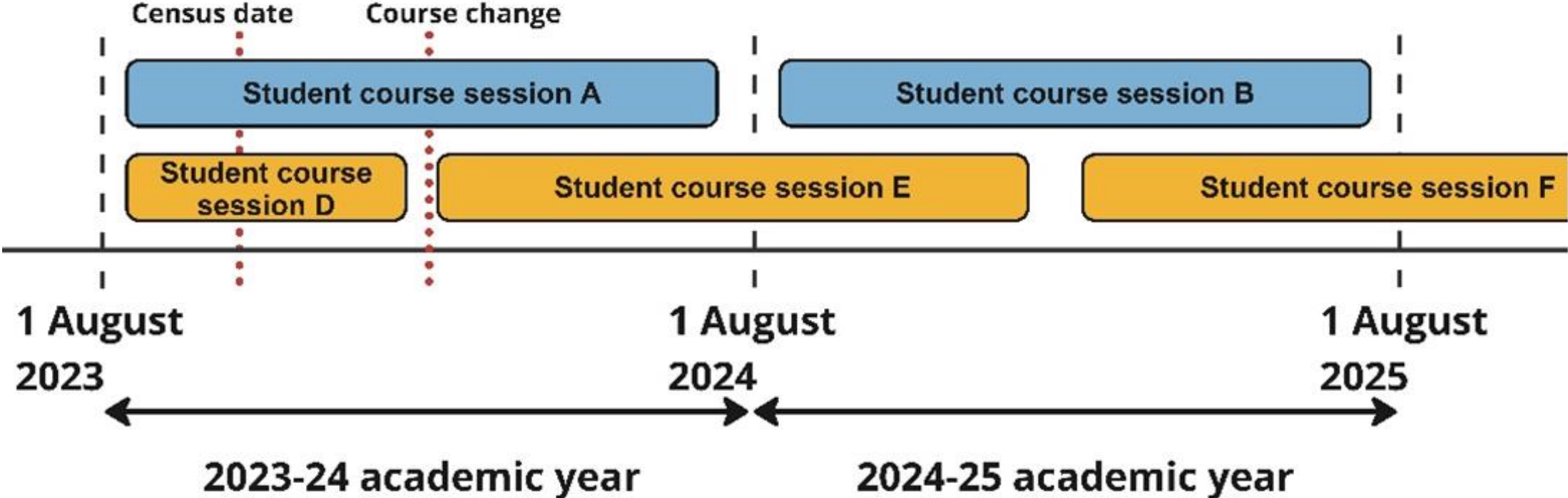
Further education and sixth form colleges and academies

- with reference to the anniversary of the student’s start date – the same as year of instance.

‘Other’ providers

- Usually based on the latest student course session that starts in the 2023-24 academic year.
- For most students, this is likely to broadly align with year of instance.
- Some students may have more than one student course session starting in the academic year.

YoE – student course session examples



YoE – implications and further changes

From the move to counting years of engagement, we have also made other changes:

1. You do not need to make non-completion forecasts in HESES:
 - issues with the historical data
 - we are not using FUNDCOMP for funding or data assurance.
2. You do not need to make FTE estimates for your part-time students
3. HESES will be collecting counts of:
 - years of engagement that start before the census date (column 1)
 - years of engagement forecast to start after the census date (column 2).

HESES22 layout (table 3, part-time)

**COLUMN
1**

**COLUMN
2**

**Non-
completion**

FTEs

			Column 1	Column 2	Column 3	Column 4 <i>Automatically populated</i>	Column 4a							
			Years countable between 1 August 2022 and census date inclusive	Forecast of years countable after census date and before 1 August 2023	Forecast of years not completed (negative values)	Estimated completed years in academic year 2022-23 (Columns 1 + 2 + 3)	Estimated FTE for completed years included in Column 4 for academic year 2022-23							
			Home fee			Home fee			Home fee			Home fee		
Price group	Length	Level	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00
	Long	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00

HESES23 layout (table 3, part-time)

COLUMN
1

COLUMN
2

			Column 1	Column 2			Column 1 + 2	
			Years countable between 1 August 2023 and census date inclusive	Forecast of years countable after census date and before 1 August 2024			Automatically populated Years countable in academic year 2023-24 (Columns 1 + 2)	
			Home fee			Home fee		
			OfS- fundable (a)	Non- fundable (b)	Overseas (c)	OfS- fundable (a)	Non- fundable (b)	Overseas (c)
Price group	Length	Level						
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00
		PGR		0.00	0.00		0.00	0.00
	Long	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00
		PGR		0.00	0.00		0.00	0.00

Other changes for HESES23

Degree apprenticeships

- We are no longer collecting separate data on home-fee years taken as part of a degree apprenticeship – Table 7 has been removed.
- These students should still be recorded on the other tables as normal.

Higher technical qualifications

- Some HTQs now meet our definition of ‘recognised higher education’ in Annex B.
- We are collecting data on the number of years that are on HTQs on Table 5.
- This will inform our mid-year funding allocation in March 2024.

Changes to counting years of engagement

- Removal of the minimum FTE criteria.

Funding methods 2024-25 – overview

How do we convert the year of engagement data returned in HESES23 into FTEs that can inform OfS funding calculations?



Multiplication factors – example

			Column 1		Column 2		Column 3		Column 4		Column 4a	
			Home fee		Home fee		Home fee		Home fee		Home fee	
			OfS- fundable	Non- fundable	OfS- fundable	Non- fundable	OfS- fundable	Non- fundable	OfS- fundable	Non- fundable	OfS- fundable	Non- fundable
Price group	Length	Level	(a)	(b)	(a)	(b)	(a)	(b)	(a)	(b)	(a)	(b)
B	Standard	UG (Level 4 and 5)	200.00	0.00	200.00	0.00	-20.00	0.00	380.00	0.00	285.00	0.00
		UG (Other)	250.00	0.00	0.00	0.00	-70.00	0.00	180.00	0.00	60.00	0.00
		PGT (UG)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Price group B, standard length, UG (Level 4 and 5), fundable

- Total years of instance in column 1 + 2 = 200 + 200 = 400
- FTE recorded in column 4a = 285
- Multiplication factor = $285 / 400 = 0.7125$

Price group B, standard, UG (Other), fundable

- $60 / 250 = 0.24$

Multiplication factors – example part 2

			Column 1		Column 2		Column 1 + 2	
			Home fee		Home fee		Home fee	
			OfS- fundable	Non- fundable	OfS- fundable	Non- fundable	OfS- fundable	Non- fundable
Price group	Length	Level	(a)	(b)	(a)	(b)	(a)	(b)
B	Standard	UG (Level 4 and 5)	240.00	0.00	170.00	0.00	410.00	0.00
		UG (Other)	100.00	0.00	0.00	0.00	100.00	0.00
		PGT (UG)	0.00	0.00	0.00	0.00	0.00	0.00

Price group B, standard length, UG (Level 4 and 5), fundable

- $410 \times 0.7125 = 292.13$ fundable FTEs to inform 24-25 funding

Price group B, standard, UG (Other), fundable

- $100 \times 0.24 = 24$ fundable FTEs to inform 24-25 funding

Funding methods 24-25 – mitigation

We are aware of the limitations with this approach.

(Some) areas where the multiplication factors will need moderating:

- new provision
- less reliable data
- other changes to provision
- new providers.

Moderation can be applied by:

- aggregating to a higher level of provider data
- using sector-level data
- provider representations.

Funding methods 24-25 – mitigation

- Once calculated, we will show you the multiplication factors for your provider **before** they are used to calculate funding.
- These will be released after the HESES23 data is signed off in February 2024.
- There will be a process for providers to make representations where the multiplication factors still seem wrong after the mitigation is put in place.
- Details of the process will be published early next year.

Anything else?

- We have reorganised the guidance: the old annexes dealing with non-completion and FTE estimates have been removed.
- The definition of 'home' fee status hasn't changed, but please check the fee regulations.

Questions

Please use the Q&A box



Other HESES23 training

- For those new to HESES
 - **Introduction to OfS funding and HESES23**
 - Video presentation to be released in September 2023
 - **Categorising your students using HESES23 definitions**
 - Webinar: Tuesday 19 September 2023
 - **Identifying and counting students to be included in HESES23**
 - Webinar: Thursday 21 September 2023
 - **Submitting and verifying your HESES23 workbook**
 - Video presentation: to be released with the recording of the preceding webinar.
- More information and recordings: officeforstudents.org.uk/events.

How to find out more

Website: officeforstudents.org.uk/heses

YouTube: youtube.com/officeforstudents

Email: heses@officeforstudents.org.uk

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Thank you for listening

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