

## Appendix 5: Guidance on the funding modelling worksheets

1. This appendix only applies to those providers that received 2018-19 teaching grant from the Office for Students (OfS).
2. This appendix describes the seven worksheets in the HEIFES18 workbook relating to the modelling of teaching funding allocations. The worksheets contain six tables which are similar to those that are included in the 2018-19 grant tables, as well as a parameters sheet. Each table shows:
  - a. Funding calculations taken directly from your provider's latest issue of the 2018-19 grant tables<sup>1</sup>.
  - b. Funding calculations modelled using HEIFES18 data with the 2018-19 teaching funding method. The HEIFES18 data is used in place of HEIFES17 data in the method.
  - c. Differences between funding calculations modelled using HEIFES18 data, and funding calculations from the latest 2018-19 grant tables.
3. The seven worksheets are:
  - A Summary – Table A: 2018-19 Summary of teaching allocations.
  - B High-cost – Table B: 2018-19 High-cost subject funding.
  - C Student premium – Table C: 2018-19 Student premium allocations.
  - D Erasmus+ – Table D: 2018-19 Erasmus+ and overseas study programmes.
  - E NMAH supplement – Table E: 2018-19 Nursing, midwifery and allied health supplement.
  - F Other TAs – Table F: 2018-19 Other targeted allocations.
  - G Parameters – Table G: 2018-19 Parameters in the funding models.
4. Please note that these tables are shown only as a comparison tool. The calculations are for modelling purposes only and should not be considered to be any kind of funding commitment by the Office for Students.

### Table A: 2018-19 Summary of teaching allocations

5. This comparison table shows a summary of all teaching funding allocations. All of the allocations are taken from the subsequent worksheets. This table can be used to identify unusual differences at a high level, while the remaining tables can be used to look at the differences in more detail.

---

<sup>1</sup> If your provider has submitted amendments to either HEIFES17 or 2016-17 Individualised Learner Record data that was accepted for funding purposes by the Office for Students, these calculations will use the latest amended data available, which may supersede the data in your latest 2018-19 grant tables.

## **Table B: 2018-19 High-cost subject funding**

6. This table shows high-cost subject funding and is populated as follows.

### **‘Calculations from latest 2018-19 grant tables’ section**

7. All of the values in this section are taken from the ‘B High-cost’ worksheet in your provider’s latest 2018-19 grant tables. The columns relating to the transfer of nursing, midwifery and allied health provision were not shown on the 2018-19 grant tables for providers that did not return any nursing, midwifery or allied health students in HEIFES17. All values are zero in these columns for these providers.

### **‘Calculations modelled using HEIFES18 data’ section**

8. The values in the ‘2018-19 FTEs from “1 Full-time”, “2 Sandwich” and “3 Part-time”’ column are the sum of standard and long length values taken from:

- a. Column 4, OfS-fundable of the ‘1 Full-time’ worksheet for full-time rows.
- b. Column 4, OfS-fundable of the ‘2 Sandwich’ worksheet multiplied by 0.5 for sandwich year out rows.
- c. Column 4a, OfS-fundable of the ‘3 Part-time’ worksheet for part-time rows.

9. The values in the ‘Total FTEs for 2018-19 high-cost subject funding’ column are taken from the ‘2018-19 FTEs from ‘1 Full-time’, ‘2 Sandwich’ and ‘3 Part-time’ column for price groups B and C1 only.

10. The values in the ‘High-cost subject funding (£)’ column are calculated from the values in the ‘Total FTEs for 2018-19 high-cost subject funding’ column multiplied by the relevant price group rate and scaling factor for high-cost subject funding on the ‘G Parameters’ worksheet.

### **‘Difference’ section**

11. The values in the ‘Total FTEs for 2018-19 high-cost subject funding’ column are calculated from the values in the corresponding column in the ‘Calculations modelled using HEIFES18 data’ section, minus the values in the corresponding column in the ‘Calculations from latest 2018-19 grant tables’ section.

12. The values in the ‘High-cost subject funding (£)’ column are calculated from the values in the corresponding column in the ‘Calculations modelled using HEIFES18 data’ section, minus the values in the corresponding column in the ‘Calculations from latest 2018-19 grant tables’ section.

## **Table C: 2018-19 Student premium allocations**

13. This table shows the student premium allocations and is populated as follows.

### **‘Calculations from latest 2018-19 grant tables’ column**

14. All of the values in this column are taken from the ‘C Student premium’ worksheet in your provider’s latest 2018-19 grant tables.

### **‘Calculations modelled using HEIFES18 data’ column**

15. The value for ‘Total FTEs for 2018-19: Full-time and sandwich year out UG’ is the sum of:
  - a. Total of Column 4, OfS-fundable, UG of the ‘1 Full-time’ worksheet.
  - b. Column 4, OfS-fundable, UG of the ‘2 Sandwich’ worksheet multiplied by 0.5.
16. The value for ‘Total FTEs for 2018-19: Part-time UG’ is the total of Column 4a, OfS-fundable, UG of the ‘3 Part-time’ worksheet.
17. The value for ‘Total FTEs for 2018-19’ is the sum of the:
  - a. Total of Column 4, OfS-fundable of the ‘1 Full-time’ worksheet.
  - b. Total of Column 4, OfS-fundable of the ‘2 Sandwich’ worksheet multiplied by 0.5.
  - c. Total of Column 4a, OfS-fundable of the ‘3 Part-time’ worksheet.
18. All other values are either taken from the ‘Calculations from latest 2018-19 grant tables’ column or are calculated as per the formula to the right of the table.

### **‘Difference’ column**

19. The values in this column are values in the ‘Calculations modelled using HEIFES18 data’ column minus the values in the ‘Calculations from latest 2018-19 grant tables’ column.

## **Table D: 2018-19 Erasmus+ and overseas study programmes**

20. This table shows the Erasmus+ and overseas study programmes allocation and is populated as follows.

### **‘Calculations from latest 2018-19 grant tables’ section**

21. All of the values in this section are taken from the ‘D Erasmus+’ worksheet in your provider’s latest 2018-19 grant tables. This table was not shown in the 2018-19 grant tables for providers that did not return any students on a year abroad in HEIFES17. All values are zero in this section for these providers.

### **‘Calculations modelled using HEIFES18 data’ section**

22. The values in the ‘2018-19 Years countable from “4 Year abroad”’ section are the sum of the Column 1 and 2 values for the equivalent columns in the ‘4 Year abroad’ worksheet. Note that sandwich year out outgoing years abroad outside the Erasmus+ programme are not included in this allocation.
23. The values in the ‘Total years countable for Erasmus+ and overseas study programmes’ column are the sum of the values in the ‘2018-19 Years countable from “4 Year abroad”’ section.
24. The values in the ‘Erasmus+ and overseas study programmes (£)’ column are calculated from the values in the ‘Total years countable for Erasmus+ and overseas study programmes’ column

multiplied by the rate for Erasmus+ and overseas study programmes on the 'G Parameters' worksheet.

### **'Difference' section**

25. The values in the 'Total years countable for Erasmus+ and overseas study programmes' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.
26. The values in the 'Erasmus+ and overseas study programmes (£)' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.

### **Table E: 2018-19 Nursing, midwifery and allied health supplement**

27. This table shows the Nursing, midwifery and allied health supplement and is populated as follows.

#### **'Calculations from latest 2018-19 grant tables' section**

28. All of the values in this section are taken from the 'E NMAH supplement' worksheet in your provider's latest 2018-19 grant tables. This table was not shown on the 2018-19 grant tables for providers that did not return any nursing, midwifery or allied health students in HEIFES17. All values are zero in this section for these providers.

#### **'Calculations modelled using HEIFES18 data' section**

29. The values in the 'FTEs from '7a Health full-time', '7b Health sandwich' and '7c Health part-time' section are the sum of:
  - a. Column 4, OfS-fundable and Non-fundable, Starters in 2017-18 in the '7a Health full-time' worksheet, and Column 4, OfS-fundable and Non-fundable, Starters in 2017-18 multiplied by 0.5 in the '7b Health "Sandwich"' worksheet, for the 'Full-time and sandwich year out, Starters in 2017-18' column.
  - b. Column 4, OfS-fundable and Non-fundable, Starters in 2018-19 in the '7a Health full-time' worksheet, and Column 4, OfS-fundable and Non-fundable, Starters in 2018-19 multiplied by 0.5 in the '7b Health 'Sandwich' worksheet, for the 'Full-time and sandwich year out, Starters in 2018-19' column.
  - c. Column 4a, OfS-fundable and Non-fundable, Starters in 2017-18 in the '7c Health part-time' worksheet, for the 'Part-time, Starters in 2017-18' column.
  - d. Column 4a, OfS-fundable and Non-fundable, Starters in 2018-19 in the '7c Health part-time' worksheet, for the 'Part-time, Starters in 2018-19' column.
30. The values in the 'Total FTEs for nursing, midwifery and allied health supplement' column are the sum of the values in the 'FTEs from "7a Health full-time", "7b Health sandwich" and "7c Health part-time"' section. Note that postgraduate full-time equivalent (FTEs) from the 'Starters

in 2017-18' column, and FTEs for professions that do not have a rate of funding for the supplement, are not counted. These cells are greyed out in the table.

31. The values in the 'Nursing, midwifery and allied health supplement (£)' column are calculated from the values in the 'Total FTEs for nursing, midwifery and allied health supplement' column multiplied by the relevant rate for each profession and level of study for the nursing, midwifery and allied health supplement on the 'G Parameters' worksheet.

### **'Difference' section**

32. The values in the 'Total FTEs for nursing, midwifery and allied health supplement' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.
33. The values in the 'Nursing, midwifery and allied health supplement (£)' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.

## **Table F: 2018-19 Other targeted allocations**

34. This table shows other targeted allocations and is populated as follows.

### **'Calculations from latest 2018-19 grant tables' section**

35. All of the values in this section are taken from the 'F Other TAs' worksheet in your provider's latest 2018-19 grant tables. The columns relating to the transfer of nursing, midwifery and allied health provision were not shown on the 2018-19 grant tables for providers that did not return any nursing, midwifery or allied health students in HEIFES17. All values are zero in these columns for these providers.

### **'Calculations modelled using HEIFES18 data' section**

36. The values in the '2018-19 FTEs from "1 Full-time", "2 Sandwich" and "3 Part-time" for 2018-19 other targeted allocations' column are taken from:
- Column 4, OfS-fundable of the '1 Full-time' worksheet for full-time rows.
  - Column 4, OfS-fundable of the '2 Sandwich' worksheet multiplied by 0.5 for sandwich year out rows.
  - Column 4a, OfS-fundable of the '3 Part-time' worksheet for part-time rows.
37. The values in the 'Postgraduate taught supplement (£)' column are calculated from the values in the '2018-19 FTEs from '1 Full-time', '2 Sandwich' and '3 Part-time' for 2018-19 other targeted allocations' column multiplied by the relevant rates for the postgraduate taught supplement on the 'G Parameters' worksheet.
38. The values in the 'Intensive postgraduate provision (£)' column are calculated from the values in the '2018-19 FTEs from "1 Full-time", "2 Sandwich" and "3 Part-time" for 2018-19 other

targeted allocations' column multiplied by the relevant rates for the intensive postgraduate provision allocation on the 'G Parameters' worksheet.

39. The values in the 'Accelerated full-time undergraduate provision (£)' column are calculated from the values in the '2018-19 FTEs from "1 Full-time", "2 Sandwich" and "3 Part-time" for 2018-19 other targeted allocations' column multiplied by the relevant rates for the accelerated full-time undergraduate provision allocation on the 'G Parameters' worksheet.
40. The values in the 'Students attending courses in London (£)' column are calculated from the values in the '2018-19 FTEs from "1 Full-time", "2 Sandwich" and "3 Part-time" for 2018-19 other targeted allocations' column multiplied by the relevant rates for the students attending courses in London allocation on the 'G Parameters' worksheet.

### **'Difference' section**

41. The values in the '2018-19 FTEs from "1 Full-time", "2 Sandwich" and "3 Part-time" for 2018-19 other targeted allocations' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.
42. The values in the 'Postgraduate taught supplement (£)' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.
43. The values in the 'Intensive postgraduate provision (£)' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.
44. The values in the 'Accelerated full-time undergraduate provision (£)' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.
45. The values in the 'Students attending courses in London (£)' column are calculated from the values in the corresponding column in the 'Calculations modelled using HEIFES18 data' section, minus the values in the corresponding column in the 'Calculations from latest 2018-19 grant tables' section.

### **Table G: 2018-19 Parameters in the funding models**

46. This table shows the parameters used for the calculations, which are the same as the parameters used in the 2018-19 funding method.