2023-24 Individualised Learner Record (ILR) data checking tool

HESES23 comparison rebuild instructions

Contents

Summary

1. This document describes how the Higher Education Students Early Statistics (HESES) recreation data can be rebuilt from the HESES23 comparison individualised file as generated by the 2023-24 ILR data checking tool.

2. The HESES23 comparison is formed of two files. These are:

   a. HESES23 comparison workbook 'HES23_DCT_XXXXXXXX.xlsx'.

   b. HESES23 comparison individualised file 'HES23_DCT_XXXXXXXX_IND.csv'.

   where XXXXXXXX is the UK Provider Reference Number (UKPRN) for the provider.

3. Each section of this document details how to rebuild specific populations of students that appear on the tables in the HESES23 comparison workbook. These tables are listed below.

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4.   This document and the HESES23 comparison workbook were updated on 26 August 2024 to include funding modelled using 2023-24 ILR data.

HESES23 tables recreated using 2023-24 ILR data

Courses table: Countable years of engagement between 1 August 2023 and census date at course level

5. For the population that appears in this table, the first filters to apply to the individualised file are:

   HESEXCL = 0

   HESREG = 1

6. To further filter these years of engagement, the following fields can be used:

   LEARNAIMREF

   HESMODE

   HESRESSTAT.

7. For example, to filter to full-time years of engagement that are fundable and UK-domiciled for LEARNAIMREF = 00123456, then the filters to apply to the individualised file are as follows:

   HESEXCL = 0

   HESREG = 1

   LEARNAIMREF = 00123456

   HESMODE = FTS

   HESRESSTAT = HOMEF_UK.

Table 1: Full-time counts of years of engagement

8. For the population that appears in this table, the first filters to apply to the individualised file are:

   HESEXCL = 0

   HESMODE = FTS

9. Additional filters can be applied to specify years of engagement in a particular cell, such as filtering by price group, length of year of engagement, level of study, and residential and fundability status.

Derived field	Definition	Values and definitions
PRGA, PRGB, PRGC11, PRGC12, PRGC2, PRGD	Used to filter to a specific price group	PRGA ≠ 0 for price group A. PRGB ≠ 0 for price group B. PRGC11 ≠ 0 for price group C1.1. PRGC12 ≠ 0 for price group C1.2. PRGC2 ≠ 0 for price group C2. PRGD ≠ 0 for price group D.
LENGTH	Used to filter to the length of year of engagement	LENGTH = S for students on a standard length of year of engagement.

Derived field	Definition	Values and definitions
		LENGTH = L for students on a long length of year of engagement.
HESLEVEL	Used to filter to the level of study	HESLEVEL = UG_45 for students on a Level 4 or 5 undergraduate course. HESLEVEL = UG_OTH for students on another undergraduate course. HESLEVEL = PGT_UGF for students who are postgraduate taught and eligible under the undergraduate student support regime. HESLEVEL = PGT_ML for students who are on postgraduate taught courses that are eligible under the masters' loan arrangements. HESLEVEL = PGT_OTH for students who are on postgraduate taught courses that do not fall under the previous two categories. HESLEVEL = PGR for students who are on postgraduate research courses.
HESTYPE	Used to filter to the residential and fundability status of the year of engagement	HESTYPE = HOMEF for Home fee OfS-fundable. HESTYPE = HOMENF for Home fee non-fundable. HESTYPE = ISOV for Overseas.
HESREG	Used to filter Column 1 and Column 2 years of engagement	HESREG = 1 for Column 1. HESREG = 2 for Column 2.

10. For example, to filter to years of engagement on this table that are fundable, in Column 1, and on a standard length year of engagement of another undergraduate course, the filters to apply to the individualised file are the following:

HESEXCL = 0

HESMODE = FTS

LENGTH = S

HESLEVEL = UG_OTH

HESTYPE = HOMEF

HESREG = 1.

11. For example, to filter to years of engagement on this table that are fundable, in Column 1, in price group C1.1, and on a standard length year of engagement of a Level 4 or 5 undergraduate course, the filters to apply to the individualised file are:

HESEXCL = 0

HESMODE = FTS

PRGC11 ≠ 0

LENGTH = S

HESLEVEL = UG_45

HESTYPE = HOMEF

HESREG = 1.

12. To find the total years of engagement meeting these criteria, sum the values of PRGC11.

Table 2: Sandwich year out counts of years of engagement

13. For the population that appears in this table, the first filters to apply to the individualised file are:

HESEXCL = 0
HESMODE = SWOUT.

14. Further filters that can be applied are the same as those in Table 1: Full-time counts of years of engagement.

15. To find the total years of engagement in this population, sum the values of PRGC2.

Table 3: Part-time counts of years of engagement

16. For the population that appears in this table, the first filters to apply to the individualised file are:

HESEXCL = 0
HESMODE = PT.

17. Further filters that can be applied are the same as those in Table 1: Full-time counts of years of engagement.

18. For example, to filter to years of engagement on this table that are fundable, in Column 2 and on a standard length year of engagement of another undergraduate course, the filters to apply to the individualised file are:

HESEXCL = 0
HESMODE = PT
LENGTH = S
HESLEVEL = UG_OTH
HESTYPE = HOMEF
HESREG = 2.

19. For example, to filter to years of engagement on this table that are fundable, in Column 1, in price group D, and on a standard length year of engagement of a Level 4 or 5 undergraduate course, the filters to apply to the individualised file are:

HESEXCL = 0

HESMODE = PT

PRGD ≠ 0

LENGTH = S

HESLEVEL = UG_45

HESTYPE = HOMEF

HESREG = 1.

20. To find the total years of engagement meeting these criteria, sum the values of PRGD.

Table 4: Home fee undergraduate years abroad

21. For the population that appears in this table, the first filter to apply to the individualised file is HESYAPOP = 1.

22. For students on an outgoing Turing year abroad, the filter to apply to the individualised file is HESYATYPE = TURING.

23. For students taking an outgoing year abroad outside the Turing programme the filter to apply to the individualised file is HESYATYPE = OTHER.

24. To identify whether a student is in Column 1 or Column 2 of the table filter to HESREG = 1 or HESREG = 2 respectively.

    a. To identify students in Column 1(a) and Column 2(a) the filter to apply to the individualised file is HESMODE = FTS.

    b. To identify students in Column 1(b) and Column 2(b) the filter to apply to the individualised file is HESMODE = SWOUT.

25. A further filter can be applied to HESTYPE to filter to students who are either fundable (HESTYPE = HOMEF) or non-fundable (HESTYPE = HOMENF).

26. To find the total headcount of students sum the variable HESYAPOP.

Table 5: Further student analysis for planning purposes

27. For the population that appears in this table, the first filter to apply to the individualised file is HESEXCL = 0.

28. To further filter these years of engagement, the following fields can be used:

HESLEVEL

HESREG

HESTYPE

HESRESSTAT

HESMODE

HESHTQ.

29. For example, to filter to full-time years of engagement that are in Column 1, on a Level 4 or 5 undergraduate course, are fundable and UK-domiciled, then the filters to apply to the individualised file are as follows:

HESEXCL = 0

HESREG = 1

HESLEVEL = UG_45

HESMODE = FTS

HESRESSTAT = HOMEF_UK.

30. To find the equivalent population of new entrants (i.e., students in Section B of this table), apply the above filters as well as HESNEWENTRANT = 1. To find the total headcount of this population sum the HESNEWENTRANT variable.

31. For example, to filter to full-time years of engagement that are on a Level 4 or 5 undergraduate HTQ course and are fundable then the filters to apply to the individualised file are as follows:

HESEXCL = 0

HESLEVEL = UG_45

HESMODE = FTS

HESTYPE = HOMEF

HESHTQ = 1.

Table 6a: Full-time counts of years of engagement for home fee students on pre-registration health courses

32. For the population that appears in this table, the first filters to apply to the individualised file are:

HESHEALTHPOP = 1

HESMODE = FTS.

33. To identify OfS-fundable years of engagement in Column 1(a) and Column 2(a), the filter to apply to the individualised file is HESTYPE = HOMEF.

34. To identify non-fundable years of engagement in Column 1(b) and Column 2(b), the filter to apply to the individualised file is HESTYPE = HOMENF.

35. To identify starters in 2023-24, the filter to apply to the individualised file is HESHEALTHYEAR = 2023-24.

36. Use HESHEALTHPROF to identify years of engagement for a particular profession.

37. Further filters can be applied to identify those with a particular length of year of engagement or level of study.

38. For example, to identify OfS-fundable years of engagement for full-time, undergraduate level, standard length podiatry courses, the filters to apply to the individualised file are:

HESHEALTHPOP = 1

HESMODE = FTS

HESTYPE = HOMEF

HESHEALTHPROF = PODCHI

LENGTH = S

HESLEVEL = UG_45, UG_OTH.

Table 6c: Part-time counts of years of engagement for home fee students on pre-registration health courses

39. For the population that appears in this table, the first filters to apply to the individualised file are:

HESHEALTHPOP = 1

HESMODE = PT.

40. To identify years of engagement in the different columns, apply filters as set out in paragraphs 33 to 35.

41. Similar filters can be applied to those in paragraphs 36 and 37 to identify years of engagement counted in a particular row.

FTEs for 2024-25 funding

42. 'FTEs for 2024-25 funding' in the recreated HESES23 tables has been calculated using the multiplication factors from the HESES23_FTE workbooks that were published in March 2024, with the exception of successful representations where updated multiplication factors are used.

43. The 'HESES23 multiplication factors Appendix 2: How the multiplication factors have been calculated' document is available at the OfS website and explains the methodology used.[1]

44. Where multiplication factors were used for HESESE23 the multiplication factor level is shown as 'N/A'. If the combination of mode, length, level and price group (or profession for Table 6a and 6c) did not feature in a provider's HESES23 return then a new multiplication factor and accompanying level will be displayed. These have been calculated using the methodology described in Appendix 2 above.

45. Multiplication factors and FTEs are only shown for OfS-fundable years of engagement.

46. 'FTEs for 2024-25' is the product of OfS-fundable years of engagement in 'Column 1 + 2' and 'Multiplication factor'.

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[1] See https://www.officeforstudents.org.uk/data-and-analysis/data-collection/multiplication-factors/.

Funding tables

47. This section details how the 2024-25 funding allocations can be modelled using the 2023-24 ILR data, where HESES23 data has previously been used.

48. Within these tables the columns titled 'Calculations using HESES23 data' contain the figures shown in the latest 2024-25 grant tables. Some of these values may not match the grant tables if there have been any amendments to HESES23 data since the grant announcement or where mergers have taken place.

49. The columns titled 'Calculations modelled using 2023-24 ILR data' contain values from the 2023-24 ILR data and calculations that are based on this data.

50. The columns titled 'Difference' are the figures calculated using 2023-24 ILR data minus the figures calculated using HESES23 data.

Table A: Summary of 2024-25 allocations

51. This table is a summary of the teaching grant allocations shown in Tables B, C, D, E and F, and shows fixed allocations that are not based on HESES23 data. This table will be used to identify unusual differences at a high level; the tables on the five other sheets can then be used to look at the differences in more detail.

Table B: 2024-25 High-cost subject funding

52. This table shows the calculation of 2024-25 high-cost subject funding.

53. 'OfS-fundable FTEs' is the sum of FTEs for 2024-25 funding from the '1_Full_time' tab, '2_Sandwich' tab and '3_Part_time' tab.

54. 'Adjustments for over-recruitment against medical and dental intake targets' is taken from column E.

55. 'Other FTE adjustments' is taken from column F.

56. 'Total FTEs for 2024-25 high-cost subject funding' is the sum of the FTEs in columns I to K.

57. 'High-cost subject funding (£)' is the 'Total FTEs for 2024-25 high-cost subject funding' multiplied by the rates of funding and scaling factor shown on the 'H_Parameters' tab.

Table C: 2024-25 Nursing, midwifery and allied health supplement

58. This table shows the calculation of the 2024-25 Nursing, midwifery and allied health supplement.

59. 'OfS-fundable FTEs (Full-time)' is taken from FTEs for 2024-25 funding from the '6a_Health_full_time' tab.

60. 'OfS-fundable FTEs (Part-time)' is taken from FTEs for 2024-25 funding from the '6c_Health_part_time' tab.

61. 'FTE adjustments' is taken from column E.

62. 'Total FTEs for NMAH supplement' is the sum of the FTEs in columns H to J.

63. The 'Nursing, midwifery and allied health supplement (£)' column is the 'Total FTEs for NMAH supplement' multiplied by the rate of funding for that profession and level, as shown on the 'H_Parameters' tab.

Table D: 2024-25 Overseas study programmes

64. This table shows the calculation of the 2024-25 Overseas study programmes allocation.

65. 'Full-time years abroad (OfS-fundable)', 'Full-time years abroad (Non-fundable)', 'Sandwich year out years abroad (OfS-fundable)' and 'Sandwich year out years abroad (Non-fundable)' are the years countable for each mode and fundability status, taken from Columns 1 and 2 of the '4_Year_abroad' tab. Sandwich years out that are not taken under the Erasmus+ or Turing programmes are not included.

66. 'Total years countable for Overseas study programmes' is the sum of the years countable in columns H to K.

67. 'Overseas study programmes (£)' is the 'Total years countable for overseas study programmes' multiplied by the rate of funding shown on the 'H_Parameters' tab.

Table E: 2024-25 Other high-cost targeted allocations

68. This table shows the calculation of other high-cost targeted allocations.

69. OfS-fundable FTEs' is the sum of FTEs for 2024-25 funding from the '1_Full_time' tab, '2_Sandwich' tab and '3_Part_time' tab.

70. 'Adjustments for over-recruitment against medical and dental intake targets' is taken from column F.

71. 'Other FTE adjustments' is taken from column G.

72. 'Total FTEs for 2024-25 other high-cost targeted allocations' is the sum of the FTEs in columns L to N.

73. 'Postgraduate taught supplement (£)' is the 'Total FTEs for 2024-25 other high-cost targeted allocations' multiplied by the postgraduate taught supplement parameters shown on the 'H_Parameters' tab.

74. 'Intensive postgraduate provision (£)' is the 'Total FTEs for 2024-25 other high-cost targeted allocations' multiplied by the intensive postgraduate provision parameters shown on the 'H_Parameters' tab.

75. 'Accelerated full-time undergraduate provision (£)' is the 'Total FTEs for 2024-25 other high-cost targeted allocations' multiplied by the accelerated full-time undergraduate provision parameters shown on the 'H_Parameters' tab.

Table F: 2024-25 Student access and success

76. This table shows the calculation of 2024-25 student access and success allocations.

77. **Premium to support successful student outcomes: full-time (main allocation and supplement).** The figure in the 'Total FTEs for 2024-25: Full-time and sandwich year out UG' row is the total FTE for full-time and sandwich year out UGs from the 'Total FTEs for 2024-25 other high-cost targeted allocations' column in 'E_Other_high_cost_targeted'.

78. **Premium to support successful student outcomes: part-time.** The figure in the 'Total FTEs for 2024-25: Part-time UG' row is the total FTE for part-time UGs from the 'Total FTEs for 2024-25 other high-cost targeted allocations' column in 'E_Other_high_cost_targeted'.

79. **Disabled students' premium.** The 'Total FTEs for 2024-25' figure is the total FTE for all modes and levels from the 'Total FTEs for 2024-25 other high-cost targeted allocations' column in 'E_Other_high_cost_targeted'.

80. **Premium for student transitions and mental health.** The 'Headcount of OfS-fundable undergraduate entrants' figure is the total OfS-fundable undergraduates included in 'Section B: New entrants' of the '5_Planning' tab.

Table G: 2024-25 Level 4 and 5 provision

81. This table is purposely excluded from the comparison workbook as the allocation is not yet announced. It is noted here as it appears in the July grant tables