

Office for
Students

The logo for the Office for Students (OfS) is a dark blue square with a yellow square in the top right corner. The letters 'OfS' are written in white inside the yellow square.

OfS

The event will start shortly

Introduction to OfS funding and HESES24

1330 - 1500

17 September 2024

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Office for
Students



OfS

HESES24 training

Introduction to OfS funding and HESES24

Roger Lear
Funding Officer

17 September 2024

Follow us on X at
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Webinar housekeeping

- Presenters
 - Host: Roger Lear (backup – Will Awad)
 - Q&A: Graham Price
- Closed captions are available – click the CC icon
- A recording of this session will be available on the OfS website
- Intended audience: those new to HESES and those needing a refresher
- How to ask a question:
 - Please use Q&A rather than ‘chat’ box
 - Use the chat to contact event support
- Please let us have your feedback.

HESES24 training

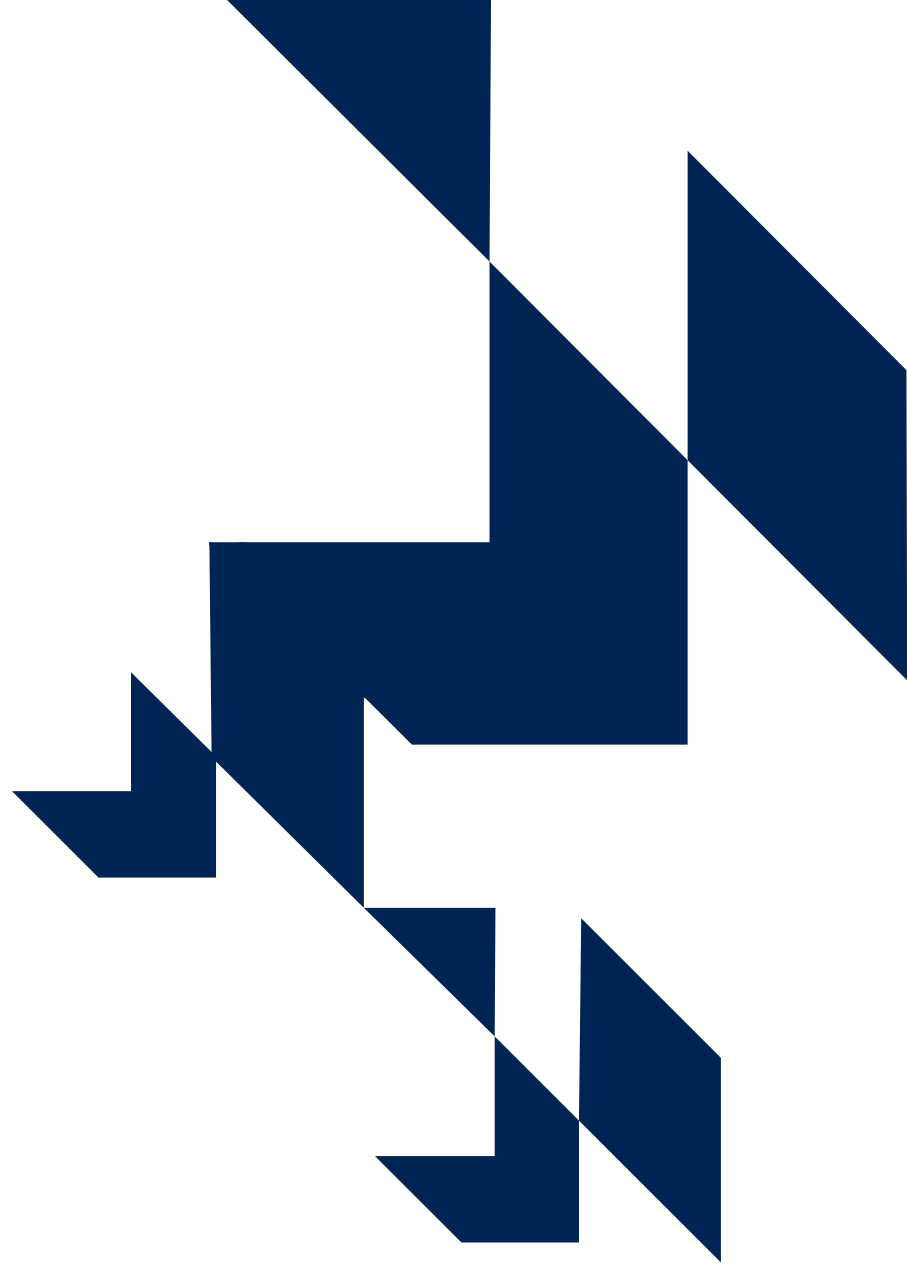
- For those already familiar with HESES
 - **Essential updates for experienced staff** - recording now available
- For those new to HESES
 - **Introduction to OfS funding and HESES24** (this presentation)
 - **Categorising your students using HESES24 definitions**
 - Webinar: Thursday 19 September 2024
 - **Identifying and counting students to be included in HESES24**
 - Webinar: Tuesday 24 September 2024
 - **Getting HESES24 signed-off and multiplication factors**
 - Webinar: Thursday 26 September 2024.

More information and recordings: www.officeforstudents.org.uk/events

Supporting materials

- Overview of OfS funding
 - **Guide to funding 2024-25**
 - www.officeforstudents.org.uk/publications/guide-to-funding-2024-25/
 - Or just search OfS 2024.35
- For HESES resources
 - www.officeforstudents.org.uk/heses
- Email alerts
 - www.officeforstudents.org.uk/sign-up-for-email-alerts

Introduction to OfS funding



Who we are

- The OfS was established by the Higher Education and Research Act of 2017 (HERA) as the independent **regulator of higher education in England**
- We aim to ensure that every student, whatever their background, has a fulfilling experience of higher education that enriches their lives and careers
- Our work covers all students:
 - undergraduate or postgraduate
 - young or mature
 - full-time or part-time
 - studying on a campus or by distance learning
 - regardless of nationality.

OfS funding powers

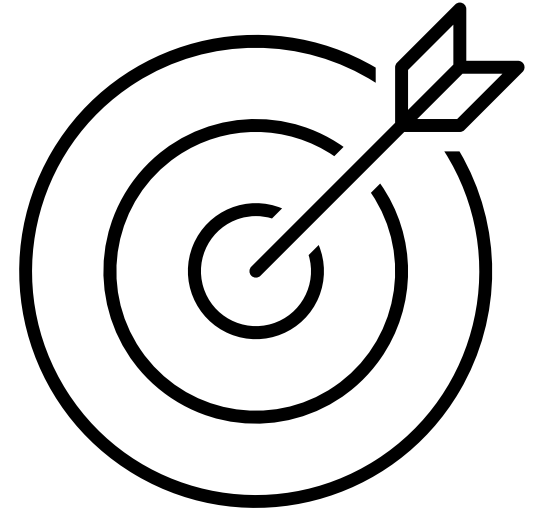
- We distribute government funding to providers:
 - used to support teaching activity, we do not fund students
 - we fund higher education activity at providers registered in the **Approved (fee cap)** category of the OfS Register
 - we will be funding about 340 providers in the academic year 2024-25
 - our allocations supplement the funds providers receive from student tuition fees.
- Various criteria apply e.g. courses must meet our definition of higher education
- **Recurrent funding:** about £1.4 billion
- **Capital funding:** £450 million for financial years 2022-23 to 2024-25



OfS funding objectives

‘Our funding helps to ensure the availability of high-quality, cost-effective higher education across the country. We promote quality of provision, and greater choice and opportunities for students, by investing in:

- high-cost subjects at undergraduate and postgraduate levels, including medicine, science, engineering and agriculture, and other strategically important subjects
- world-leading specialist providers
- part-time provision and other flexible modes of delivery.’

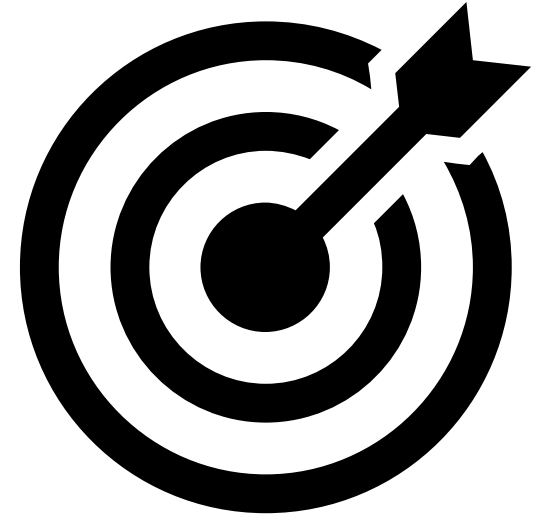


‘OfS Guide to funding’

OfS funding objectives

‘We want students from disadvantaged backgrounds, underrepresented groups and those with disabilities not only to access higher education, but also to achieve successful outcomes, including progression to postgraduate study.’

‘OfS Guide to funding’



Four key documents



The Rt Hon Gillian Keegan MP
Secretary of State for Education

Sanctuary Buildings 20 Great Smith Street Westminster London SW1P 3BT
Tel: 0370 000 2288 www.education.gov.uk/contactus/ife

4 April 2024

Dear Lord Wharton

Guidance to the Office for Students from the Secretary of State for Education on the allocation of Strategic Priorities Grant funding for the 2024-25 Financial Year and associated terms and conditions

I am writing to set out the Higher Education (HE) Strategic Priorities Grant (SPG) budget for the 2024-25 financial year with my funding priorities. This letter provides guidance to the Office for Students (OfS) under section 2(3) of the Higher Education and Research Act 2017 (HERA 2017) and sets terms and conditions of funding under section 74(1) of that Act. In giving this guidance and determining the terms and conditions of funding, I have had regard to the need to protect the institutional autonomy of English higher education providers (HEPs) under sections 2(4) and 74(3) of the HERA 2017.

Your SPG budget for the 2024-25 financial year and the related terms and conditions are set out in Annexes 1 and 2 of the guidance. Guidance on the government's broader priorities for the OfS will be communicated separately.

I want to thank the OfS for successfully launching the Degree Apprenticeship Development Fund during the 2023-24 financial year, with wave 1 allocating £12m to 51 providers and strong progress being made on wave 2. I am pleased to confirm the total funding for this campaign is being maintained at £40m across the two financial years as set in the funding guidance of 30 March 2023. For the 2024-25 financial year, the funding available amounts to £24m which should be used to help more people – including those who might not otherwise be able to go to university – to access these life changing opportunities.

Additionally, I renew my thanks for the work of the OfS in supporting the development and implementation of the NHS Long Term Workforce Plan. The coming financial year marks the start of the expansion, with additional medical places from Autumn 2024. As a result of this expansion, and the launch of the medical degree apprenticeship pilot, I am providing funding as part of the 2024-25 financial year allocation in line with the increased provision of 405 medical places starting in 2024-25 academic year.

Office for
Students 

Funding for academic year 2024-25

OfS decisions

Reference OIS 2024.33

Enquiries to recurrentgrant@officeforstudents.org.uk

Publication date 29 July 2024

Office for
Students 

Terms and conditions of funding for 2024-25

Reference OIS 2024.36

Enquiries to recurrentgrant@officeforstudents.org.uk

Publication date 29 July 2024

Office for
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Guide to funding 2024-25

How the Office for Students allocates
money to higher education providers

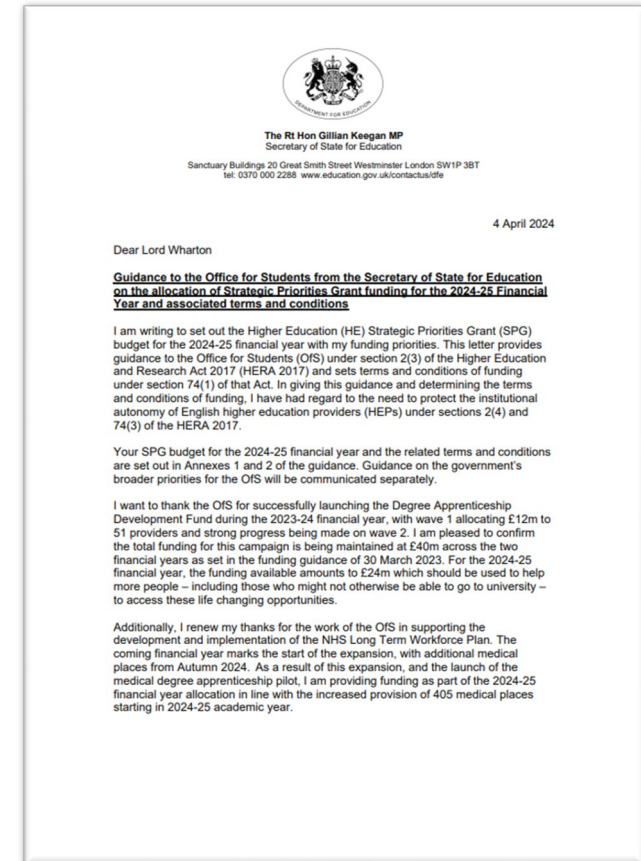
Reference OIS 2024.35

Enquiries to recurrentgrant@officeforstudents.org.uk

Publication date 29 July 2024

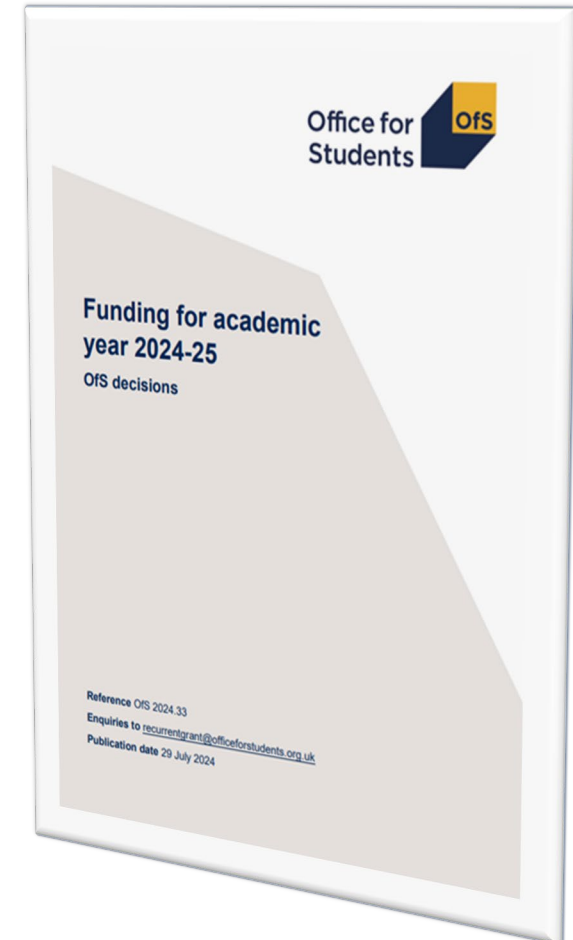
OfS funds and government guidance

- Allocated annually in a **statutory guidance letter** from the Secretary of State for Education:
 - usually sent in the first quarter of the **calendar** year
 - search ‘Guidance from government’ on our website.
- Contains details of:
 - budgets for recurrent and capital funding
 - any **guidance** which the OfS must have regard to.
- The Department for Education (DfE) can apply statutory conditions on our use of funding (and did so for 2024-25).



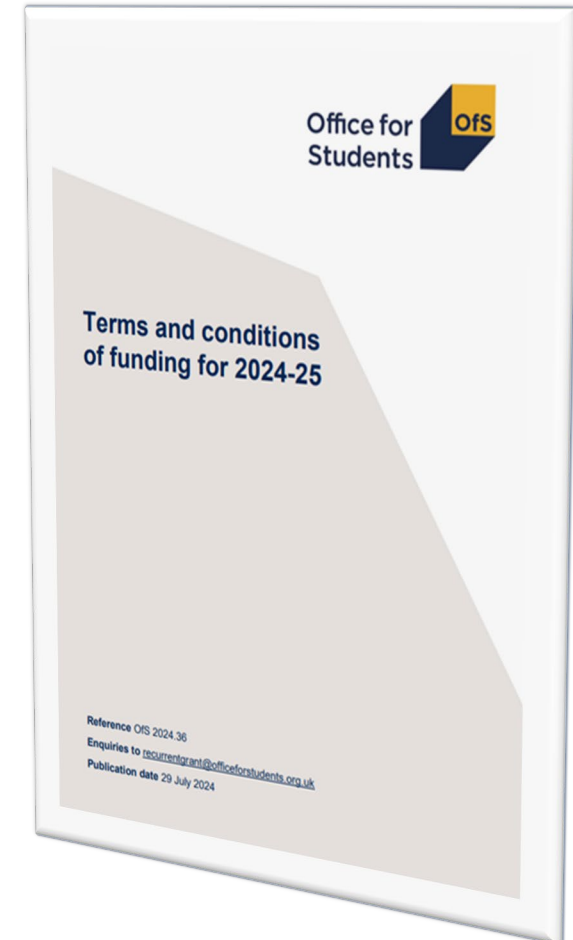
OfS decisions on funding

- We may need to consult on any substantial changes to our funding methods
- **‘Funding for academic year 2024-25’** document
- Decisions are taken in the light of
 - the budgets available to us
 - government guidance we receive
 - any statutory conditions imposed by the Department for Education on our use of their funding
 - our general duties as set out in the Higher Education and Research Act 2017
 - our public sector equality duties, as set out in the Equality Act 2010.



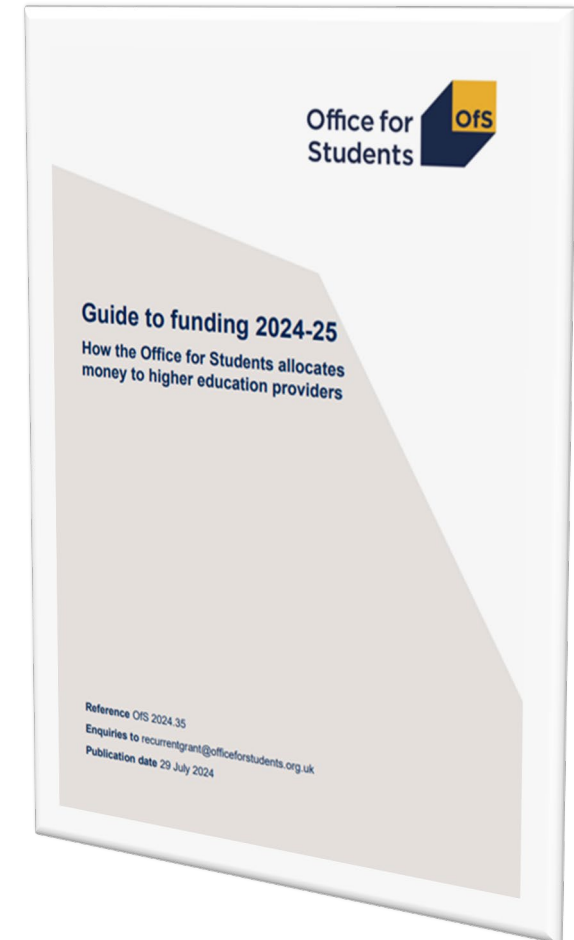
OfS funding terms and conditions

- Terms and conditions apply:
 - see OfS 2024.36 published on our website.
- Providers largely have autonomy on how they spend allocations (in terms of scope under HERA)
 - providers are ‘free to distribute internally, at their own discretion, all funding from the OfS which is not earmarked or provided for a specific purpose’.
- Earmarked funds e.g:
 - capital funding
 - student premium funding
 - very high-cost STEM subjects
 - funds allocated via Challenge Competitions.



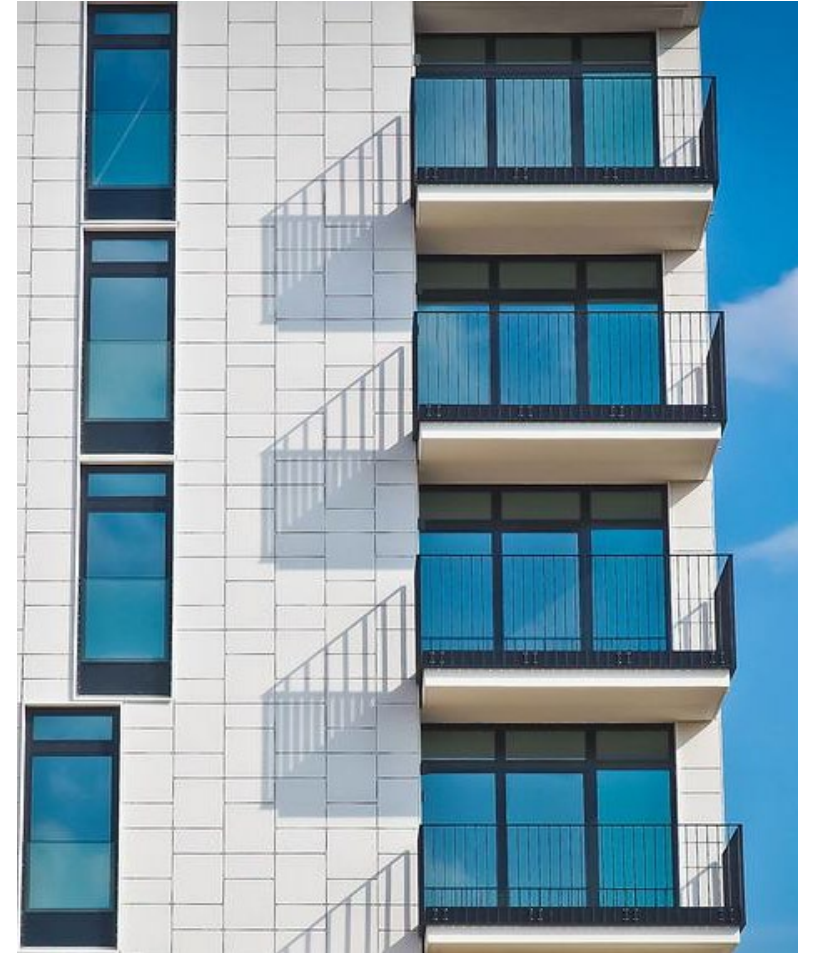
OfS funding model

- **Guide to funding** - available from our website:
 - search for 'guide to funding'.
- **Recurrent funding** - mostly allocated by formula
- **Capital funding**
- **Funding for national facilities and regulatory initiatives**
 - Includes funding to support:
 - Challenge Competitions
 - The National Student Survey
 - Jisc.



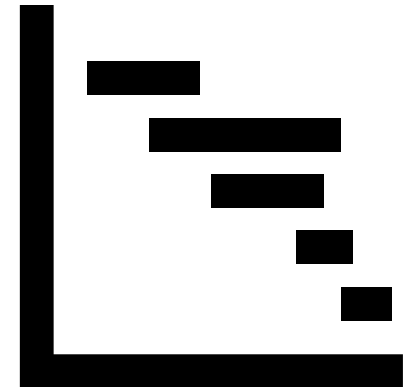
Capital funding

- Allocated on a financial-year basis (April – March).
- £450 million for the period of 2022-23 to 2024-25:
 - bulk distributed via a bidding exercise (£399 million)
 - formula allocation to most providers (a minimum threshold applies), totalling £11 million per year
 - support for capital expenditure by Jisc.
- Any funding for 2025-26 and beyond will depend on future guidance from government
- See our capital funding webpages:
 - www.officeforstudents.org.uk/for-providers/finance-and-funding/capital-funding/



Recurrent funding

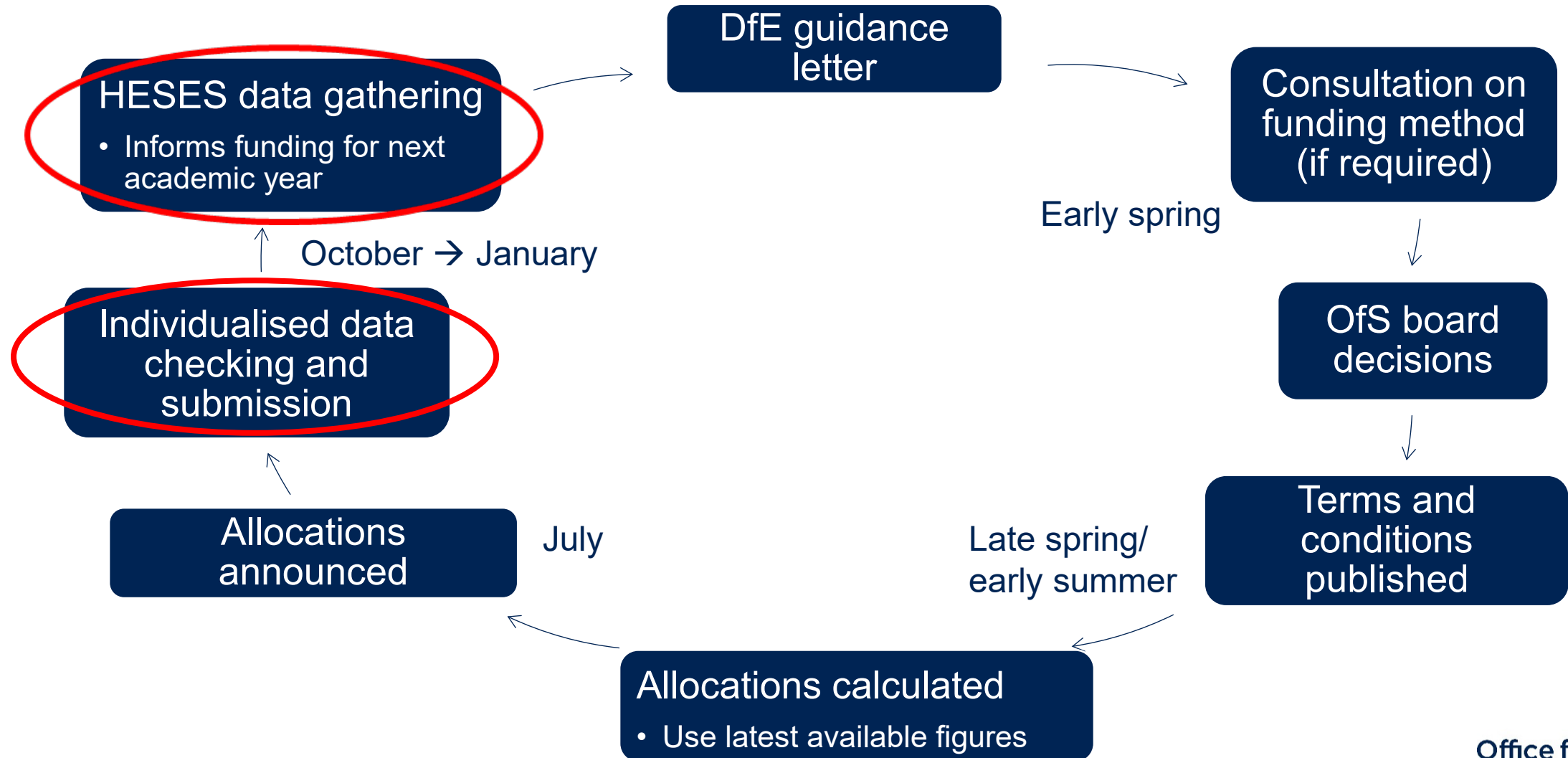
- Recurrent funding is allocated on an academic year basis
- Has a number of funding streams
- Primarily made through formula calculations
 - HESES data from the current academic year informs the calculation of funding allocations for the next academic year:
 - this allows the calculation of grant allocations using **the most recent** student numbers
 - example: HESES24 data will inform recurrent funding for academic year 2025-26.
- Funding allocations are announced in spring/summer prior to the start of the academic year



Elements of recurrent grant for 2024-25

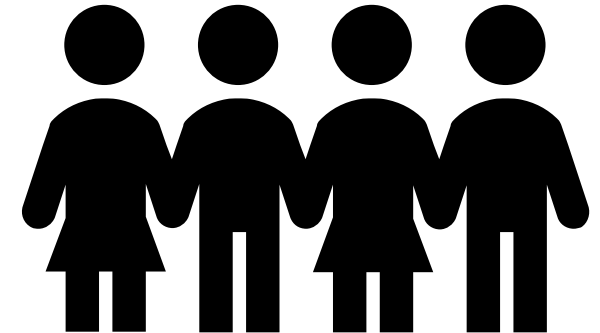
Elements of recurrent grant	Amount (£ million)
Funding for high-cost courses	1,043
Funding for student access and success	301
Funding for specialist providers	58
Total	1,402

Recurrent funding cycle – where we are now



OfS people – the funding team

- Administer the funding round – more on this in a moment
- Advise OfS senior management and directors on formulation of funding policy
- Liaise with our counterparts at
 - Department for Education (DfE)
 - Other bodies with funding interests e.g:
 - NHS England (formerly Health Education England)
 - Department of Health and Social Care (DHSC)
 - Medical and dental councils
 - Jisc
 - Research England.

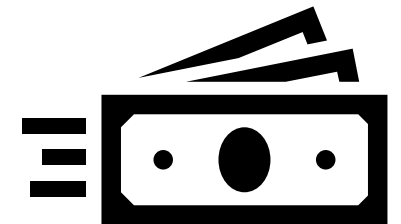
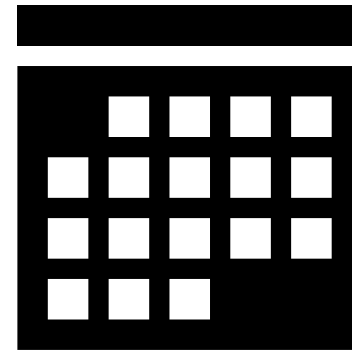


OfS funding team – administering the funding round

- **Regulation** directorate – determine amounts to be allocated to providers
 - Recurrent funding:
 - count students studying at higher education providers (HESES)
 - apply formulae to allocate funds to those providers based on this and other data.
 - Capital funding:
 - calculate formula-based allocations
 - evaluate capital bids, allocate and monitor usage of capital funding.
 - Other funding streams e.g:
 - Challenge Competitions – usually bidding exercises for themed projects
 - specialist providers.
- **Data Foresight and Analysis** directorate – calculation and analysis

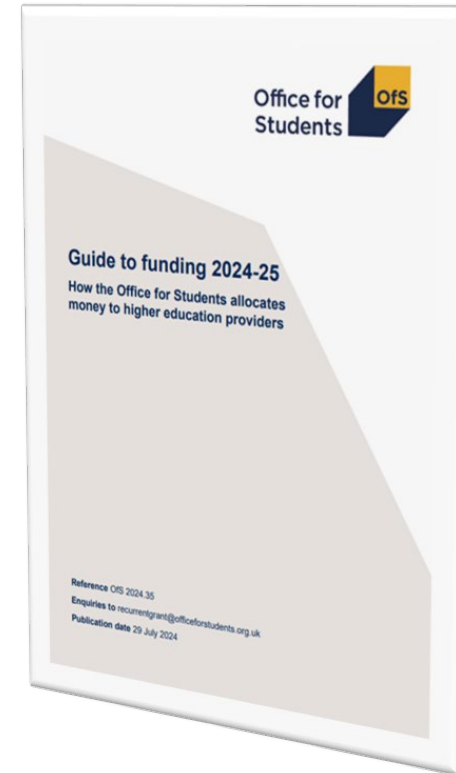
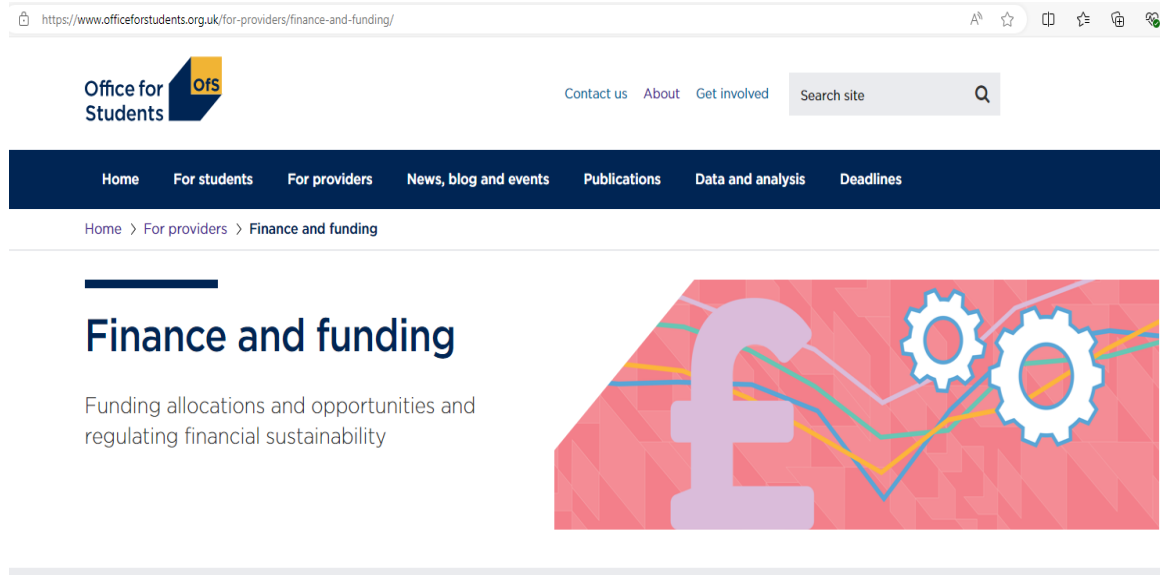
OfS people – the finance team

- Administering the scheduling and payment of funds to providers
- Do a lot of their work through the OfS portal:
 - <https://extranet.officeforstudents.org.uk/grantreport>
- Contact the finance team:
 - generalfinancequeries@officeforstudents.org.uk



OfS funding – further reading

- The funding section of the OfS website
 - www.officeforstudents.org.uk/for-providers/finance-and-funding/



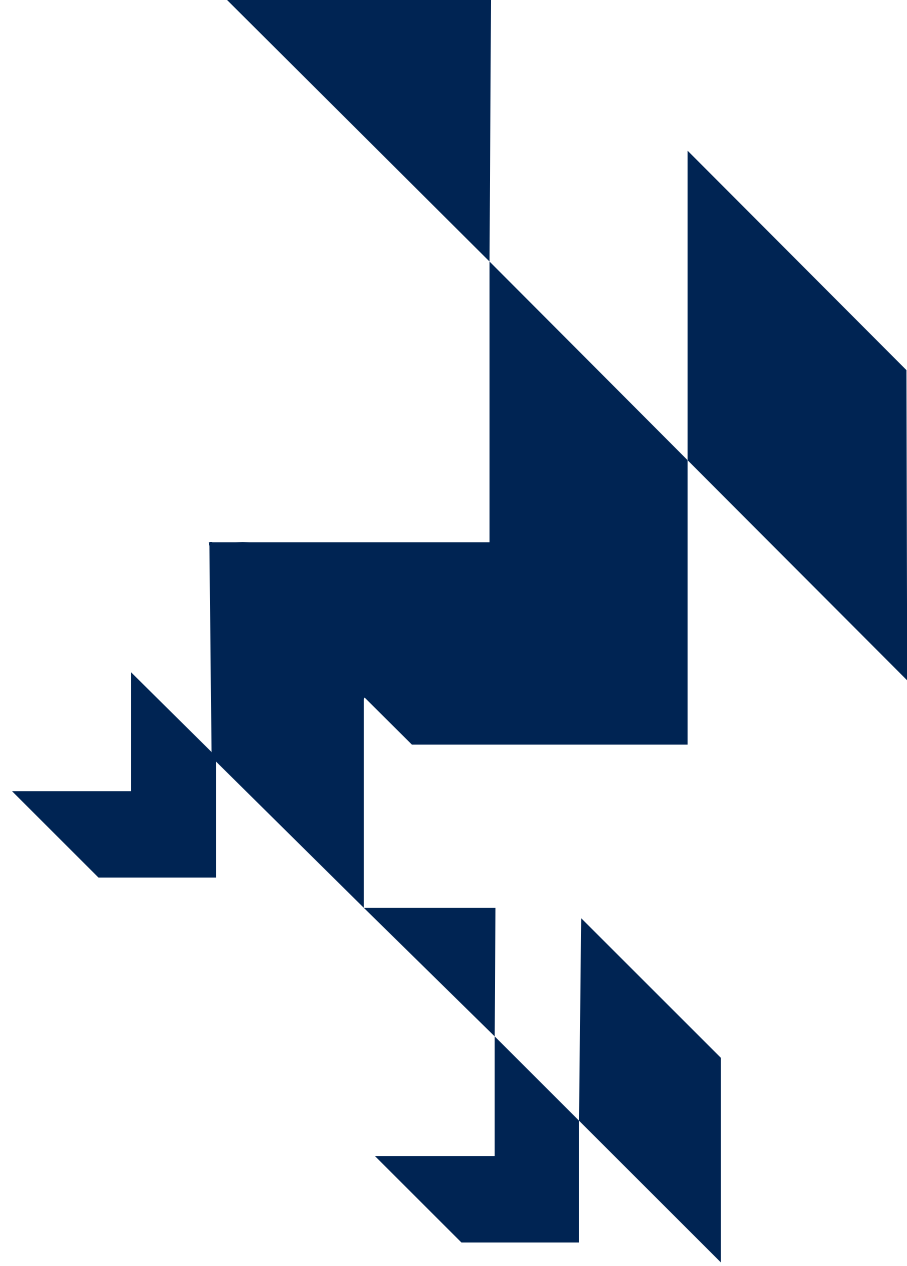
- Our 'Guide to Funding 2024-25'

Any questions?

Please use the Q&A box



HESES24 student data and funding



Student data and funding – setting the scene

- Most of our funding is formulaic and informed by student data
- HESES is the source of **aggregate student data**:
 - used for both recurrent and capital funding
 - we fund **teaching activity** by using student data as a proxy measure
 - accurate data → accurate and fair funding
 - published as an official statistic, available to the sector and the public at large
 - categorised in various ways e.g. full or part-time, undergraduate and postgraduate.
- We also use the latest available **individualised student data**:
 - provides information on student characteristics used in calculations for ...
 - ... our 'Funding for student access and success' allocations
 - **further education colleges (FECs)** – reported to the ESFA
 - **others** – reported to the Designated Data Body (DDB i.e. Jisc).

Who completes what?

- **HESES** - Higher Education Students Early Statistics survey:
 - Completed by higher education providers:
 - **on the OfS Register** in the **Approved (fee cap)** category
 - have students registered with them for the **current academic year** (2024-25)
 - on courses that meet our definition of recognised higher education.
- **HESF** - Higher Education Students Forecast survey:
 - Same criteria as for HESES except for those that:
 - have no students in the current academic year
 - expect to teach students in the **following** academic year (2025-26).
 - Uses the same definitions as HESES
- Providers only complete one of these surveys for any one academic year.

The HESES survey

- **HESES**: Higher Education Students Early Statistics
 - Annual data return submitted to the OfS
- Gives us an early indication of higher education students at a provider in the **current** academic year (2024-25)
- Used to inform allocation of funds for the **following** academic year (2025-26)
- Is used to report on your higher education students in aggregate, categorised in particular ways.



The HESES workbook

Office for Students: Higher Education Students Early Statistics Survey 2024-25 HESES24

A Higher Education provider
UKPRN: 00000000

Dates

Census date: Sunday 1 December 2024
Submission deadline: Noon Wednesday 11 December 2024
Multiplication factor representations submission deadline: Noon Friday 14 February 2025

Submission information

Date workbook submitted: Not yet submitted
Submission number: Not yet submitted

Workbook checks

Validation checks:

No validation errors

Credibility checks:

No credibility warnings

Comparison table highlighting:

No comparison table highlighting

Multiplication factor representations checks:

No validation errors

About this workbook

This workbook collects data from providers in the Approved (fee cap) category of the Office for Students (OfS) register. This workbook collects counts of years of engagement at a provider in the 2024-25 academic year as defined in the HESES24 guidance and compares the data collected to student data returns from previous years. Completed workbooks can be uploaded any number of times until the deadline for submission. When the deadline passes, the latest uploaded version will be taken as the final workbook for submission. Any workbook uploaded before the census date will be treated as invalid, and a further workbook will need to be uploaded on or after the census date to pass validation checks. If you require an accessible version of this workbook please contact heses@officeforstudents.org.uk

Guidance

Guidance documents which should be referred to when completing the HESES24 workbook are available on the OfS website. These include the main HESES24 guidance

- The HESES survey is a Microsoft Excel workbook
- **Available late October** from the OfS portal
 - we email **student data contacts** when it's ready
 - to add to or update student data contact names, email us at HESES@officeforstudents.org.uk

Getting the HESES workbook: the OfS portal



Welcome to the OfS portal

To access the portal, you will need an account. If you were previously a user of the HEFCE extranet, you will already have an account and can use your existing login details. If you were not, you will need to [create an account](#) using the access key which was sent to you by post or email.

For more information about how we treat the information provided to OfS, and to view the terms and conditions of use, please see our [privacy policy](#).

This site uses cookies, please see our [privacy policy](#) for more information.

Login

Email

Password

Login

[Forgotten password?](#)

Have an access key but don't have an account? [Create an account](#)

Having problems? Contact portal@officeforstudents.org.uk providing details.

Released in late October via the OfS portal.

- <https://extranet.officeforstudents.org.uk/data>

Portal access is administered locally at each provider by your local **user administrator**

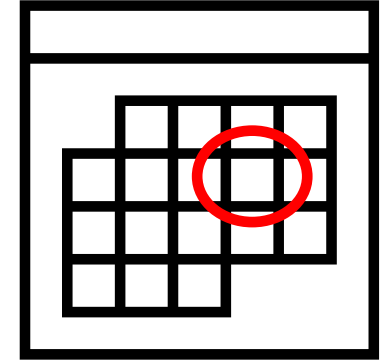
- see our documentation about the portal at www.officeforstudents.org.uk/heses – refer to Appendix 1 to the HESES guidance
- portal@officeforstudents.org.uk for help

See our **Getting HESES24 signed-off and multiplication factors** webinar for more.

Completing HESES24

- What you need:
 - to have an understanding of the data you are being asked for i.e. HESES definitions
 - to identify and count students in these categories
 - to submit your workbook, get it verified and then signed off.
- Reflected in our training:
 - 19 September: Categorising your students using HESES24 definitions
 - 24 September: Identifying and counting students to be included in HESES24
 - 26 September: Getting HESES24 signed-off and multiplication factors.

HESES24 important dates



- **Vary according to type of provider**
 - further education and sixth form colleges and academies (FECs):
 - all others
- **Census date**
 - **FECs:** 1 November 2024 **all others:** 1 December 2024
- **Submission deadline - noon** on the submission deadline:
 - **FECs:** 13 November 2024 **all others:** 11 December 2024
- **HESES24 sign-off deadline:** 31 January 2025 for all providers
- **Representations on Multiplication Factors**
 - must be received by 14 February 2025

HESES24 - data verification, sign-off and multiplication factors

- **Data verification**

- Runs from submission deadline to sign-off deadline
- Dialogue to ensure that we have the best possible picture of your provision:
 - this ensures accurate funding
- Any changes needed to your return can be made in this time
- Sign-off must be completed by 31 January 2025 (all providers)

- **Multiplication Factors**

- Any representations to be made by 14 February 2025
- For more on both these topics, see our final webinar on 26 September 2024:
 - **Getting HESES24 signed-off and multiplication factors**
 - www.officeforstudents.org.uk/events

HESES – further information and reading

- **www.officeforstudents.org.uk/heses**
 - **HESES guidance** document
 - **Completing the HESES24 workbook** document
 - model workbooks
- **www.officeforstudents.org.uk/heses-training**
 - details and recordings of and slides from HESES webinars
- Email alerts service
 - www.officeforstudents.org.uk/sign-up-for-email-alerts
- You can always contact the HESES team at the OfS:
 - heses@officeforstudents.org.uk

Any questions?

Please use the Q&A box



- You can always contact the HESES team at
 - heses@officeforstudents.org.uk

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OfS

Thank you for listening

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