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Understanding the 25/26 apprenticeship funding rules

In partnership with David Lockhart-Hawkins

2 June 2025 2pm

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Today's

presenter



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About SDN



Helping you launch, adapt and improve your apprenticeships

SDN are **industry-leading specialists** in apprenticeships, technical education and workforce development.

Our focus is on helping you **take action**. We give you the knowledge and clarity you need, and provide you with the tools, to make real progress.

We've supported over:

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- 130 Universities
- 60 EPAOs
- 1,000+ Schools & Colleges
- 1,500 Employers

Staff CPD | Consultancy | Reviews & audit prep | Tools & resources

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Objectives for today



Key documents and sources



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dividualised Learner acord (LR) technical ocuments, guidance i squirements

2020 to 2028

Funding Rules

Funding Rules 25/26

https://www.gov.uk/government/publications/apprenticeship-funding-rules-2025-to-2026

Summary of Changes .

https://assets.publishing.service.gov.uk/media/682479dc7293a87b6c75ebf 9/Apprenticeship_funding_rules_2025_to_2026_-_summary_of_changes.pdf

Off the job minimum requirements list •

https://assets.publishing.service.gov.uk/media/682357582a6442d07e7e07d0/Apprent iceship_funding_rules_annex_C__off_the_job_training_minimum_requirements.xlsx

ILR Specification

Specification & appendices •

https://guidance.submitlearnerdatabeta.fasst.org.uk/

Funding agreements

25/26 Funding agreements .

https://www.gov.uk/government/collections/esfa-funding-agreements-and-contracts#dfe-funding-agreements-for-2025-to-2026

NEET Guidance

https://www.gov.uk/government/publications/participation-of-young-people-education-employment-and-training

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1) Level 7 funding

24/25 Rule	25/26 Rule	Priority Actions
L7 fundable without restrictions	 Funds for new starts up until end of December 2025 Funding for new starts 	Establish impact on forecast funding val and remodel accordingly
	 Form January only being from January only being for ages 16-21 or if holding EHCP 19-24 (EHCP TBC in version 2 of rules) 	 Evaluate your strate offer and intent Consider commercia funded alternatives (e.g. diplomas)

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HIGH

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2) Funding agreements for ITP, Employer, HEI, Local authority

HIGH



24/25 Rule		
Ofsted inadequate in part or overall results in significant interventions	•	Cons impr whe over to in
	•	lnter may term
	•	Rele and

- Consecutive "requires improvement" grades whether in part or overall—could now lead to intervention actions.
- Intervention actions may include termination.
- Relevant clauses: 13.3 and 13.4.

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Priority Actions

- Continue to invest in quality management and Ofsted preparedness
- Monitor for confirmation of new inspection approach
- Ensure change is effectively led

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https://assets.publishing.service.gov.u k/media/682b06c102662c6f8ec243fe /Schedule_of_Changes_2025_to_202 6.pdf



3) Closure of ESFA





24/25 Rule	25/26 Rule	Priority Actions
ESFA terminology used in documents and templates	Replacement of all with Department for Education or DfE	Replace all ESFA wording in marketing and operational materials with DfE (Department for Education)



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4) End Point Assessment Models HIGH



24/25 Rule

- Named "End Point Assessment"
- EPA conducted by third party unless integrated degree apprenticeship
- Integrated conducted by provider if approved
- Could be agreed up to 6 months ahead of gateway

25/26 Rule

- Renamed "Apprenticeship assessment" and "Assessment organisation", Gateway to completion replaces "gateway"
- Non-integrated may have components delivered by provider (subject to standard assessment plan) -"assessment may take place on programme rather than all at the end, so that assessment can happen at the right time and place"
- Organisation must be engaged with at start (para 341) for revised standards
- "Summer guidance" to be released (Para 340-352)

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Priority Actions

- Liaise with the employer group for your standards and your range of EPAOs to establish what is likely going to need to be assessed in house
- Develop the assessment resource as needed
- Negotiate price models based on year of start rather than year of completion
- Amend contract templates you use to confirm assessment details with employers



https://help.apprenticeships.education. gov.uk/hc/engb/articles/24599908217746-Apprenticeship-Assessment-Principles



5) Minimum Duration of Practical Period

HIGH



24/25 Rule	25/26 Rule	Priority Actions
Minimum practical period of 12 months	 Minimum practical period of 8 months (para 71) If planned to be more than 8 can complete as long as 8 is met (does affect additional payments) For starts prior to 1.8.25 previous rules still apply 	 Understand the hours necessary to develop occupational competence in each of your standards to understand volume to distribute Review your typical durations and remodel based on both client demand and delivery capability Liaise with your employers on models that suit them Consider retention rates of the employer in modelling

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6) OTJ Minimum Volume

HIGH



24/25 Rule

- 1) Minimum OTJ was based on practical period at 6 hours per week minus statutory leave.
- Minimum 278 hours if practical period was 52 weeks, 2) increased for each week.
- 3) Apprentice could complete if had met minimum at point in time they were ready for EPA

1)	Minimum is published per standard with flexible duration (para 78) but must deliver this minimum unless there is RPL
2)	New minimum to be an apprentice is 187 if RPL applied (para 79)
clar	nificant new knowledge, skills and behaviours" returns as ification for eligibility however can be equated to the v 187 OTJ minimum. (para 57)
3)	Can complete if they meet either the published volume for standard or the revised value after prior learning.

25/26 Rule

If your curriculum plan is more than the minimum then minimum to be achieved is the minimum for standard minus hours of prior learning from your model.

For starts prior to 1.8.25 previous rules still apply.



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6) OTJ Minimum Volume

VERSION	JOB TRAINING: MINIMUM REQUIREMENT FOR EACH	APPRE	NTICESH	P STANDARD		
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6) OTJ Minimum Volume

HIGH

Priority Actions Using the new published minimums list, review your curriculum designs and highlight programmes below the published minimums Identify the missing content or understated hours and increase appropriately • • If you were significantly under the new minimum values and it wasn't because of understated hours in programme plan be prepared for the funding impact of prior learning in enrolment processes • If you are over, then ensure you continue to record this value in your ILRs as will drive future values for the standard Strengthen your initial assessment validation processes to have robust assurance of competence • Consider the strategic advantages of delivery models absorbing high volume recognition of prior learning, using the new . 187 minimum – examine price per hour • Remember that the value you record in your ILR for planned hours for new starts will be your curriculum value or published minimum minus the prior learning of that individual

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7) OTJ Part Time/Zero Hours MEDIUM



24/25 Rule	25/26 Rule	Priority Actions
Formulaic extension based on working hours	 No mandatory formula providers to set 'realistic' duration by negotiation (para 80.3) For starts prior to 1.8.25 previous rules still apply. 	 Consider programme design and the fit with your employer base Approve training plan designs against the new minimums



8) OTJ RPL Reductions

HIGH

HIGH



24/25 Rule

1) Formula for calculation of funding adjustment for prior learning used a formula of planned hours of your programme minus prior learning hours to work out percentage of content reduction

The funding band adjustment was then half of that percentage.

E.g. 400 hours original programme

Minus 100 hours of prior learning = 300 hour revised programme.

100 ÷ by 400 is 25%

Funding reduction to band is $25\% \div 2 = 12.5\%$

2) 278 OTJ hours was minimum number to be an apprentice after RPL



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8) OTJ RPL Reductions

25/26 Rule

 For RPL calculation use the minimum volume published for standard or volume of hours in the provider planned curriculum whichever is greater

"Providers must use, as a minimum, the volume of off-thejob training hours published on the standard (or Annex C) as this starting point (see paragraph 78)."

2) 187 is now minimum OTJ after RPL (Para 33)

For starts prior to 1.8.25 previous rules still apply

Note - seeking clarification on this one - liaise with DfE



RPL Calculation 25/26	Example 1: Curriculum is published minimum	Example 2: Curriculum is more than published minimum
Original funding Band	£9,000	£9,000
Published hours for standard	400	400
Provider curriculum	400	500
Prior learning from initial assessment	100	100
% of prior learning	25%	20%
Reduction to band	12.5%	10%
Revised planned hours after RPL (enter in ILR)	300	400
Minimum hours if completes faster (published minus RPL)	300	300
Revised funding band	£7,875	£8,100

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8) OTJ RPL Reductions

Priority Actions

- Ensure you validate your programme designs and hours and ensure the correct hours are in your prior learning calculations for August 1st starts
- Good providers will strengthen their validation processes and translation of skills analysis to curriculum to be sure of PL • adjustments and give greater confidence to funding models
- Ensure training plan has field of minimum hours and field of planned hours. The minimum hours will be the standard's published minimum minus the hours of prior learning
- The floor for eligibility will be 187 •
- Use the RPL calculator from session 2 to ensure funding calculations are correct. •



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9) OTJ Completion Minimum for a completing 25/26 Start

HIGH

HIGH



24/25 Rule	25/26 Rule	Priority Actions	RPL Calculation 25/26	Exemple
The minimum to complete for a start prior to 24/25 is	The minimum for a 25/26 start that is completing will	Ensure you have appropriate compliance		Carricolum publishe minimur
the latter of:	be	controls to flag instances where the published	lingma testing Band	11.000
278hrs of off the job	• a) standard's published	minimum minus prior	Full and the second too	300
training,	minimum hours minus the hours of prior learning	learning value is unlikely or has not been met and pre-	Provider curriculum	400
Original planned hours of programme or	identified at start (para 74 – being clarified)	gateway to completion and at completion	Prior loaning frant	100
of programme of	being claimed)	accompletion	% of processing	254
The minimum hours based on practical period	 e.g. standard says 290, provider programme is 300 	Await calculator that will come with session 2 or	Reductory to bend	12.5%
completed at point of readiness for EPA	but there is 10 hours prior learning. Minimum is 290-	liaise with software supplier.	Revised planned hours, after BR, (waar 10 AR)	
	10 = 280.		Minimum tasata if completes Solter solution and ARU	300
	 For starts prior to 1.8.24 prior 		present the state state	

RPL CERLINERON 23/26	Garricolum Is published minimum	Curriculum is more than published minimum
lingme testing fami	(LTDEE	£100839
Fullished hours for worders	300	419
Provider curriculum	400	500
Prior learning from Hitsel generation	100	540
% at prior tearning	254	20%
Reduction to hand	12.5%	124
Renned planned hours: after BPL (water 1/ AR)	-	400
Minimum tapat if completes Soter publication and RC	300	200
Record fording hand	Sector.	14,100



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rules apply

10) OTJ Delivered in fewer than planned – Statement of Satisfaction

LOW



24/25 Rule	25/26 Rule	Priority Actions
When actual OTJ were less than planned and individual went to EPA earlier than planned end date a statement of satisfaction from the employer was required	 No longer required (para 91.7) Will be required for starts prior to 1.8.25 	Consider whether you still wish to use the statement of satisfaction and the means in which it is asked

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11) Maths and English Functional Skills





24/25 Rule	25/26 Rule	Priority Actions
For someone aged 19 or over at start it is employer or apprentice choice in whether the functional skills are necessary	• The same as 24/25 version 2 but employer has overall responsibility (41.2)	 Establish policy Improve declarations in training plan to ensure entitlements made clear after the apprenticeship Understand the 24/25 V2 rules impact on retention rates for aims



12) M&E Plan

MEDIUM



24/25 Rule	25/26 Rule	Approvidices aged 19+ when they begin their approxitionitip training 44. Where it is agreed, with the employer, that a 10+ apprentice will along towards is standatione English and / or maths qualification; the presider must include this	Priority Actions
 To support funding for maths and English aims you need evidence of learning to support the aim start date and evidence of continued learning 	 Clear plan and evidence of active learning month to month or of the pattern of delivery as set out in training plan (para 43.2/44.2) 	 In the training plane, which is a speed by the provider, employee and oppretries. 44.1. Howdens must not claim to any funding the standardine English and / or markin qualifications and intering has commented. 44.2. The provider is responsible for employing the accentence. 44.3. The provider is responsible for employing the dispect training the English and / or markin taking plane is neoting that accentence. 44.3. The provider is responsible for employing the dispect training the English and / or markin taking plane is monother. It and for the prophere must had if the taking plane is monother. It and for the prophere is a delivery as taking plane is monother at an of the taking plane is monother. It and for the prophere is a delivery to deliver the accentency or out if the interpretion of the approximation of the accentency of delivery. 44.4. The provider must delive the training plan describes English and / or marking delivery at a delivery. 44.4. The provider must provide vertice evidence at gateway that the appretices to accente all / or marking and / or marking the approximation of the approximation of the accentency of delivery. 43.3. The provider must deliver the receiving plan describes English and / or marking delivery an adding the taking plan describes English, and / or marking delivery. 43.3. The provider must deliver the receiving anound of training recoded is modeless for the assessment(s). 43.4. The provider must deliver the receiving an out of training recoded is modeless for the assessment(s). 43.4. The provider must deliver the receiving an out of training recoded is modeless. The provider must deliver the receiving an out of training that the appretion the advected and the advected an advected an advected and the deliver. 	 Review your curriculum design for M&E delivery and ensure is updated to training plan templates Update your OTJ capture model to include M&E as non-OTJ activity or strengthen software automation

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13) Additional Payments

MEDIUM



24/25 Rule	25/26 Rule	Priority Actions
• For additional employer and provider payments for a 16-18 year old or 19-24 EHCP or care leaver, the first payment of £500 was made to provider after 90 days on programme and second at 365 days	 Because of reduction to minimum duration, where a programme is planned to be less than 12 months, the second £500 additional payment will be generated at 242 days However if was planned to be 12 months or more and achieves earlier than 12 months, the additional payment is not made (para 104.2.1 - to be clarified) Also clarification that additional payments will continue only after resumption in event of a break in learning (para 273) 	 Ensure the new payment rules are clear in the terms and conditions employers are signing Clarify with help center the second additional payment term - likely clarified in next version of rules



16) 16-17 Yr Olds at Risk From MEDIUM **Becoming NEET**





24/25 Rule	25/26 Rule	Priority Actions	
Statutory duty to report learners aged 16-17 at risk of becoming "Not in education or training" (apprenticeships count as the latter), but was not written in funding rules	 Duty to inform local authority when a young person is no longer participating or before completion or drops out Enables local authority to take action to encourage young person to re-engage 	Ensure relevant officers are aware of the guidance here: https://www.gov.uk/govern ment/publications/participa tion-of-young-people- education-employment- and-training	Contraction of the second seco
	(section 13 of Education & Skills Act 2008) (para 266.2)	 Ensure you are aware of your local authority points of contact - challenging if a provider with a wide geography Assign responsibility and accountability within your organisation if not already in place 	Participation of young people in education, employment or training Statutory guidance for local autombus Auri 2004

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17) Foundation Apprenticeships HIGH



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	New Programme for 25/26	
 New level 2 product with programmes designed to be at least 8 months and 187 hours (para 125-153) 		Additional payments apply to employer and provider based on duration however employers in some of the standards receive additional
 https://www.instituteforapprenticeships.org/apprenticeships/?types=FoundationApprenticeship 		monies.(para 138)
Building service engineering	• Aged between 22 and 24 years old • and has either an Education, Health	There are also specific rules to this programme but most other
Finishing trades	and Care (EHC) plan provided by their local authority and / or has been, or	apprenticeship rules also apply: IA, RPL, pricing, OTJ etc
Onsite trades	are, in the care of their location authority as defined in paragraph	Starts only possible once an EPAO has
Hardware, network and infrastructure	103.2; or 127.3.	obtained Ofqual recognition
Software and data	• Aged between 22 and 24 years old • and is either a prisoner (see	Specific evidence requirements, will explore in session 2.
Engineering and manufacturing	paragraph 67.4) or is a prison leaver.	
• Health and social care	• FA must be the most suitable path and confirmed in IA.	

17) Foundation Apprenticeships **HIGH**



- Consider resources necessary to develop effective products here
- Client group = increased • intensity of support
- . Liaise with EPAOs to identify if planning to register



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18) Care Leaver Bursary





24/25 Rule	New 25/26 Rule	Priority Actions
• N/A	 Clarification to ensure the learner (read this as 'applicant') is informed (para 58) Clarification that this is tax free and not treated as income for universal credit 	 Ensure application processes demonstrates the benefits of disclosure: the £3000 and clarifies that is not treated as UC income Ensure the terms for completion prior to 300 days are made clear Liaise with help center on para 106.1 definition of completes



19) Prisoner Apprentices

LOW



24/25 Rule 25, • Prisoners could not take EPA prior to release • Prisoner may un point as to release • Appear new sta require

25/26 Rule
Prisoner apprentices may undertake end- point assessment prior to release (para 259.1)
Appears to apply to new starts only - requires clarification.

Priority Actions
If this is within your
offer ensure you review

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your delivery models

Clarify if retrospective

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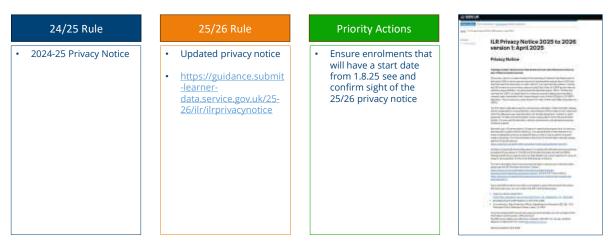
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20) ILR









21) Eligibility - Residency

24/25 Rule

 EEA and Switzerland nationals in the process of awaiting results had to meet specific evidence criteria.

Eligibility for residency	25/26 Rule
status:	Eligibility for residency status:

 EEA and Switzerland nationals qualify if they have pre-settled or settled status under the EU Settlement Scheme (EUSS).
 They must have lived continuously in the EEA, Switzerland, Gibraltar, or the UK for at least 3 years before their apprenticeship begins.
 Pre-settled status considerations:

- It does not expire, even if the individual has not made a further application to the EUSS. - Individuals with pre-settled status are deemed to have sufficient time remaining to complete an apprenticeship.

Priority Actions

MEDIUM

- Update eligibility documentation templates with relevant updates
- Consider marketing approaches
- More in part 2



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Summary & Next steps Understand the detail

- **Significant changes:** The 2025–26 rules represent the most significant changes to apprenticeship compliance and funding since 2017
 - Shift to an 8-month minimum duration
 - Standardisation of minimum OTJ (Off-the-Job) hours
 - Changes in assessment
- Impact on providers:
 - The new hours rules provide a baseline for delivery models and allow flexibility but increase risk for those who do not plan or execute their programmes with discipline
 - Providers need to review and update programme design, documentation, and internal controls
 - The level 7 decision is final; providers must work with the current position, with significant risks in a rush to enrol
- Risk mitigation:
 - Proactive staff retraining and employer communication are essential for risk mitigation and strategic advantage



Upcoming changes:

- Version 2 of the rules will reflect the new level 7 position and include clarifications on OTJ minimums
- This version is expected in time for part 2 of the series, which will cover:
 - Phases of the apprentice journey
 - Changes affecting these steps
 - Specific documentation and template changes
 - Useful tools, including a detailed changes action plan

Join deep-dive series with tools:

 Attendees of the first session can subscribe to the full paid series



Continuing this series



If you want to have a deeper understanding and get to grips with the granular detail you can sign up for a further 4 hours of CPD as we deep dive into all of the changes and provide you with useful tools to implement and embed necessary changes.

https://www.strategicdevelopmentnetwork.co.uk/sdnevent/2025-apprenticeship-funding-rules/

Session 2 - "Detailed implementation" (3rd July - 3 hours)

We dig into the detail and cover all the changes with a detailed set of actions that address the changes that need to be made in policy, documentation and operational design as well as Q&A. Tools included: "Detailed Changes Action Plan", "RPL Calculator", "OTJ Analysis tool"

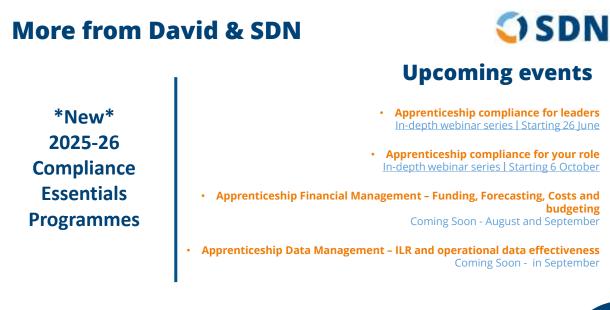
Session 3 – "Supporting change" (28th July – 1 hour)

We will take account of updated clarifications and best practice developments to finalise implementation ahead of the new year

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How Aptem is adapting to the 2025/26 funding rules



Guided by our expert-led Compliance Advisory Board, we will be:

- Reviewing OTJT hours based on standard, published minimum and 187 hours.
- Removing the link between working hours and durations for OTJT.
- Categorising OTJT and EM hours to link to logging OTJT to support Functional Skills Delivery.
- Creating Training Plan version V1.1 in June and V2 in July.







Any questions?

Upcoming webinars



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