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Understanding the 25/26 apprenticeship funding rules

In partnership with
David Lockhart-Hawkins

2 June 2025



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Today's presenter



David Lockhart-Hawkins
Consultant in Apprenticeship Compliance & Quality Implementation
Managing Director: Lockhart Hawkins
Strategic Associate: SDN

https://www.linkedin.com/in/davidlockharthawkins/

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About SDN

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Introduction

Objectives for today

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Key documents and sources

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/682479dc7293a87b6c75ebf9/Apprenticeship_funding_rules_2025_to_2026_-_summary_of_changes.pdf

- Off the job minimum requirements list

https://assets.publishing.service.gov.uk/media/682357582a6442d07e7e07d0/Apprenticeship_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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What is changing in the apprenticeship journey?

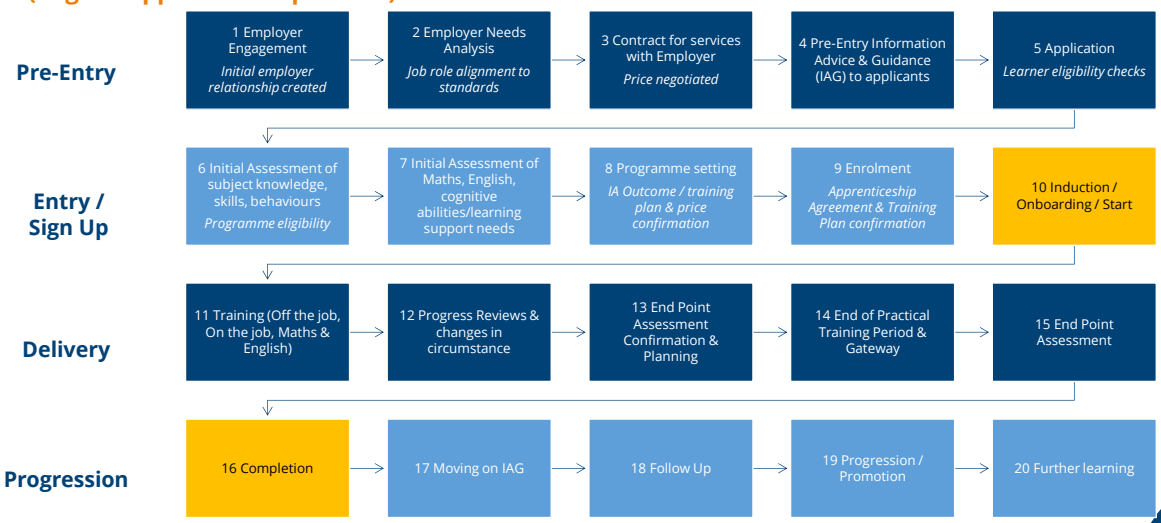
Understanding impact on provision

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Stages of the learner journey

(English apprenticeships 24-25)



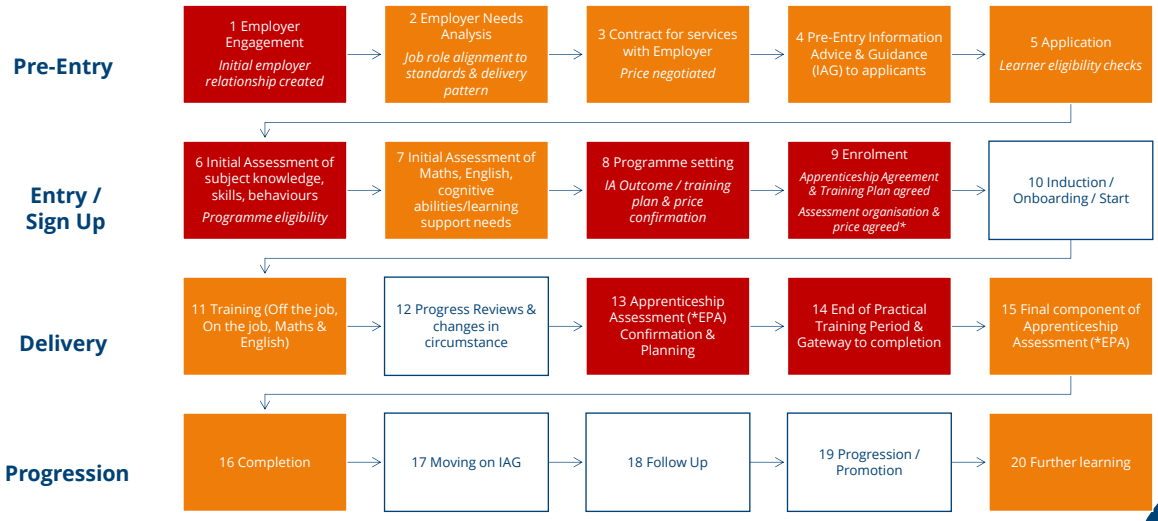
Ref 1 *Basic Learner Journey L1-L20 - Orange indicates the start and end of funding unless apprentice withdraws on programme*

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Stages of the learner journey

(English apprenticeships) – Key areas of change for 2025/26 Version 1 (New starts)



Ref 1 *Basic Learner Journey L1-L20 - *Applies to revised standards from April 25*

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1) Level 7 funding

HIGH

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 from January only being for ages 16-21 or if holding EHCP 19-24 • *(EHCP TBC in version 2 of rules)*	• Establish impact on forecast funding values and remodel accordingly • Evaluate your strategic offer and intent • Consider commercially funded alternatives (e.g. diplomas)

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

HIGH

24/25 Rule	25/26 Rule	Priority Actions
• Ofsted inadequate in part or overall results in significant interventions	• 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.	• Continue to invest in quality management and Ofsted preparedness • Monitor for confirmation of new inspection approach • Ensure change is effectively led



https://assets.publishing.service.gov.uk/media/682b06c102662c6f8ec243fe/Schedule_of_Changes_2025_to_2026.pdf

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3) Closure of ESFA

MEDIUM

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	25/26 Rule	Priority Actions
• 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	• 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)	• 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


Apprenticeship Assessment Principles

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

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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

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24/25 Rule	25/26 Rule
1) Minimum OTJ was based on practical period at 6 hours per week minus statutory leave. 2) Minimum 278 hours if practical period was 52 weeks, 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) "significant new knowledge, skills and behaviours" returns as clarification for eligibility however can be equated to the new 187 OTJ minimum. (para 57) 3) Can complete if they meet either the published volume for standard or the revised value after prior learning. 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.*

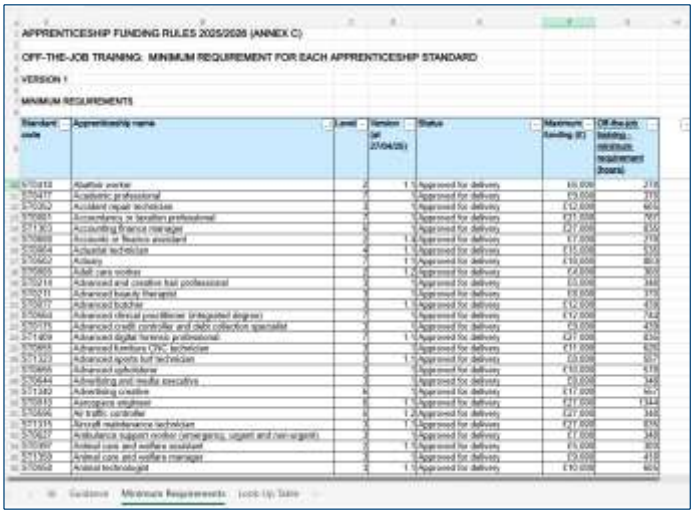
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6) OTJ Minimum Volume

HIGH

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APPRENTICESHIP FUNDING RULES 2025/2026 (ANNEX C)

OFF-THE-JOB TRAINING: MINIMUM REQUIREMENT FOR EACH APPRENTICESHIP STANDARD

VERSION 1

MINIMUM REQUIREMENTS



https://assets.publishing.service.gov.uk/media/682357582a6442d07e7e07d0/Apprenticeship_funding_rules_annex_C_-_off_the_job_training_minimum_requirements.xlsx

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6) OTJ Minimum Volume

HIGH

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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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6) OTJ Minimum Volume & duration variables

HIGH

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80. The provider must agree with the employer the volume of off-the-job training hours and the most appropriate timeframe and delivery model in which to deliver the training.

80.1. There is no longer a direct delivery link between the required hours and the apprentice's planned (or actual) duration. The planned hours, reduced if necessary to account for relevant and evidenced prior learning, can be delivered over any timeframe, provided the statutory minimum duration (of 8 months) is met.

For example, if the standard required 278 hours, and the apprentice had no prior learning, this training could be delivered over 8 months, 12 months or 15 months; the duration will depend on learner and employer choice / need.

If an apprentice, on the same standard, had evidence of relevant prior learning, then the provider could reduce the required hours, in line with this evidence, from 278 to 187 (187 being the lowest volume for a compliant programme), and again choose the most appropriate timeframe over which to deliver the training (subject to meeting the statutory minimum duration of 8 months).

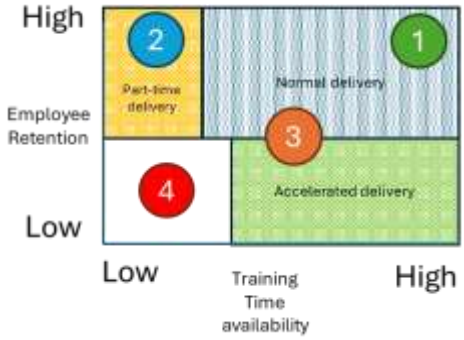


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6) OTJ Minimum Volume & duration variables

HIGH

Duration and OTJ hours flexibilities: Employer modelling & delivery type considerations



1. All Star: Low risk employer for any model
2. 25/26 Opportunity: Low risk employer with less hours per week
3. Average risk employer
4. High risk: low achievement – AVOID unless prior learning exists

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7) OTJ Part Time/Zero Hours

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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

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8) OTJ RPL Reductions

HIGH

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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% ÷ 2 = 12.5%

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

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8) OTJ RPL Reductions

HIGH

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25/26 Rule

1) 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-the-job 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

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

HIGH

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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

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24/25 Rule

- The minimum to complete for a start prior to 24/25 is the latter of:
- **278hrs of off the job training,**
- **Original planned hours of programme or**
- **The minimum hours based on practical period completed at point of readiness for EPA**

25/26 Rule

- The minimum for a 25/26 start that is completing will be
- a) standard's published minimum hours minus the hours of prior learning identified at start (para 74 – being clarified)
- e.g. standard says 290, provider programme is 300 but there is 10 hours prior learning. Minimum is 290-10 = 280.
- *For starts prior to 1.8.24 prior rules apply*

Priority Actions

- Ensure you have appropriate compliance controls to flag instances where the published minimum minus prior learning value is unlikely or has not been met and pre-gateway to completion and at completion
- Await calculator that will come with session 2 or liaise with software supplier.

RPL Calculation 25/26	Example 1: Curriculum is published minimum	Example 2: Curriculum is more than published minimum
Original funding Band	£3,000	£5,000
Published hours for standard	400	400
Provider curriculum	400	500
Prior learning from initial assessment	100	100
% of prior learning	25%	20%
Reduction in band	12.5%	10%
Revised planned hours after RPL (year in AM)	300	400
Minimum hours if completes faster (published minus RPL)	300	300
Revised funding band	£3,875	£4,500

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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

MEDIUM

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

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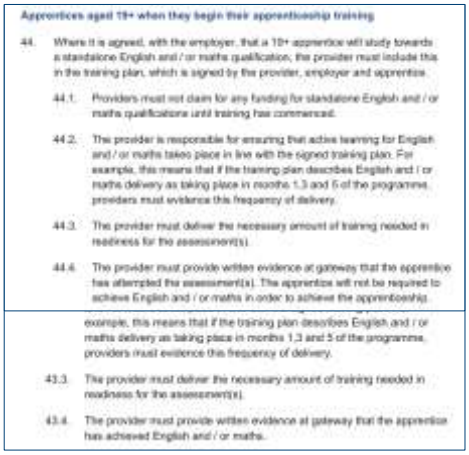
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12) M&E Plan

MEDIUM

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24/25 Rule	25/26 Rule	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)	• 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



Apprentices aged 19+ when they begin their apprenticeship training

44. Where it is agreed, with the employer, that a 19+ apprentice will study towards a standalone English and / or maths qualification, the provider must include this in the training plan, which is signed by the provider, employer and apprentice.

44.1. Providers must not claim for any funding for standalone English and / or maths qualifications until training has commenced.

44.2. The provider is responsible for ensuring that active learning for English and / or maths takes place in line with the signed training plan. For example, this means that if the training plan describes English and / or maths delivery as taking place in months 1,3 and 5 of the programme, providers must evidence this frequency of delivery.

44.3. The provider must deliver the necessary amount of training needed in readiness for the assessment(s).

44.4. The provider must provide written evidence at gateway that the apprentice has attempted the assessment(s). The apprentice will not be required to achieve English and / or maths in order to achieve the apprenticeship.

example, this means that if the training plan describes English and / or maths delivery as taking place in months 1,3 and 5 of the programme, providers must evidence this frequency of delivery.

43.3. The provider must deliver the necessary amount of training needed in readiness for the assessment(s).

43.4. The provider must provide written evidence at gateway that the apprentice has achieved English and / or maths.

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13) Additional Payments

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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

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

MEDIUM

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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 (section 13 of Education & Skills Act 2008) (para 266.2)	• Ensure relevant officers are aware of the guidance here: https://www.gov.uk/government/publications/participation-of-young-people-education-employment-and-training • 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



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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) • https://www.instituteforapprenticeships.org/apprenticeships/?types=FoundationApprenticeship • *Building service engineering* • *Finishing trades* • *Onsite trades* • *Hardware, network and infrastructure* • *Software and data* • *Engineering and manufacturing* • *Health and social care*	• Eligibility: Aged between 16 and 21 years old (or 15 years of age if the apprentice's birthday is between the last Friday of June and 31 August); or 127.2. • Aged between 22 and 24 years old and has either an Education, Health and Care (EHC) plan provided by their local authority and / or has been, or are, in the care of their location authority as defined in paragraph 103.2; or 127.3. • Aged between 22 and 24 years old and is either a prisoner (see paragraph 67.4) or is a prison leaver. • FA must be the most suitable path and confirmed in IA.	• Additional payments apply to employer and provider based on duration however employers in some of the standards receive additional monies.(para 138) • There are also specific rules to this programme but most other apprenticeship rules also apply: IA, RPL, pricing, OTJ etc • Starts only possible once an EPAO has obtained Ofqual recognition • *Specific evidence requirements, will explore in session 2.*

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17) Foundation Apprenticeships HIGH

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Priority Actions

- 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 LOW

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24/25 Rule

- N/A

New 25/26 Rule

- 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

Priority Actions

- 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

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19) Prisoner Apprentices

LOW

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24/25 Rule	25/26 Rule	Priority Actions
• Prisoners could not take EPA prior to release	• Prisoner apprentices **may** undertake end-point assessment prior to release (para 259.1) • Appears to apply to new starts only - requires clarification.	• If this is within your offer ensure you review your delivery models • Clarify if retrospective

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20) ILR

LOW

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24/25 Rule	25/26 Rule	Priority Actions
• 2024-25 Privacy Notice	• Updated privacy notice • https://guidance.submit-learner-data.service.gov.uk/25-26/ilr/ilrprivacynotice	• Ensure enrolments that will have a start date from 1.8.25 see and confirm sight of the 25/26 privacy notice


ILR Privacy Notice 2025 to 2026
version 1: April 2025

Privacy Notice

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21) Eligibility - Residency

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24/25 Rule	25/26 Rule	Priority Actions
• EEA and Switzerland nationals in the process of awaiting results had to meet specific evidence criteria.	• 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.	• 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

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Summary & Next steps
Understand the detail

- **Action steps**:
  - Form a change team with leadership and accountability
  - Prioritise key areas important to your organisation
  - Use the official rules, not summaries, to avoid incorrect interpretations
  - Lean on software suppliers to address known issues
- **Strategic focus**:
  - This year poses challenges for weaker providers lacking clarity in programme hours and development activities
  - Stronger providers will understand their planned delivery hours and align their models with employer needs for optimal development and completion
- **Future events**:
  - Join future events for more insights and support

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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/

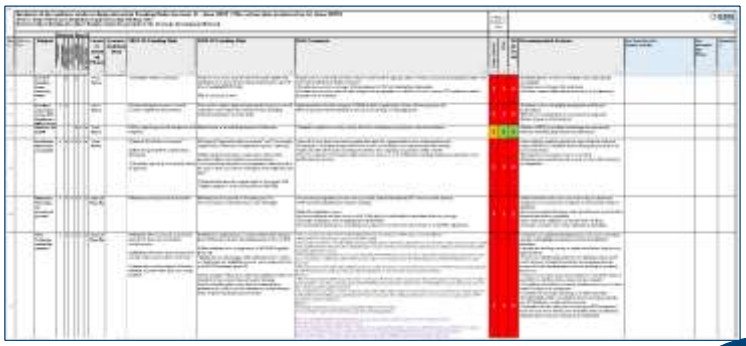
20% discount for Aptem members. Use the code **Aptem20** at checkout.

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

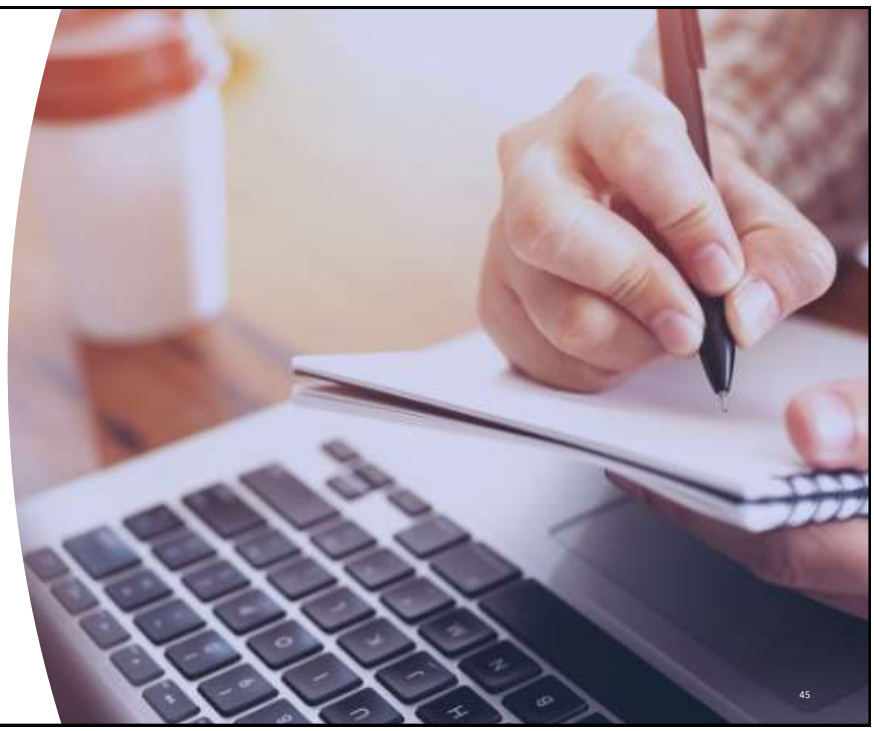
Guided by our expert-led Compliance Advisory Board, we will be:

- 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.

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Any questions?



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Upcoming webinars

The role of AI in addressing the challenges in the apprenticeship sector Tuesday 17 June 11am – 11.45am	**Practical tips to keep you R14 ready** Tuesday 26 June 11am – 12pm	**Aptem product roadmap:** **Q2 2025 update** Tuesday 8 July 11am – 11.30am	**How do training providers continue to improve their Qualification Achievement Rate?** Tuesday 10 July 11am – 12.00pm

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Thank you

hello@aptem.co.uk

3 Harmood Grove, London, NW1 8DH

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2 June 2025

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