

The 2025 to 2026 Apprenticeship Funding Rules Version 1 May 2025

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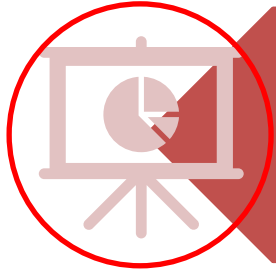
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WELCOME !



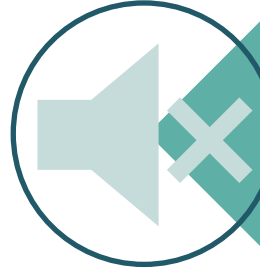
Slides and recording will
made available after the
session for UVAC
Members



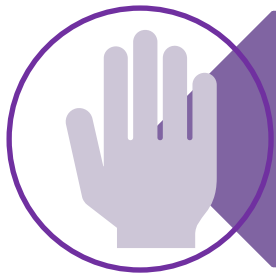
Annotated versions of the
2025/2026 documents are
available now in the toolbar
'Materials' section



All materials can be
accessed from the
members portal



The session will be recorded
All participants will be on
mute for the session



To ask a question just
raise your hand or add
to the private chat-
these will be read out



Please stay online for the
evaluation survey at the end

Agenda



Funding Rule Releases – Points to Note

2025 - 2026 Version 1 Funding Rules Overview

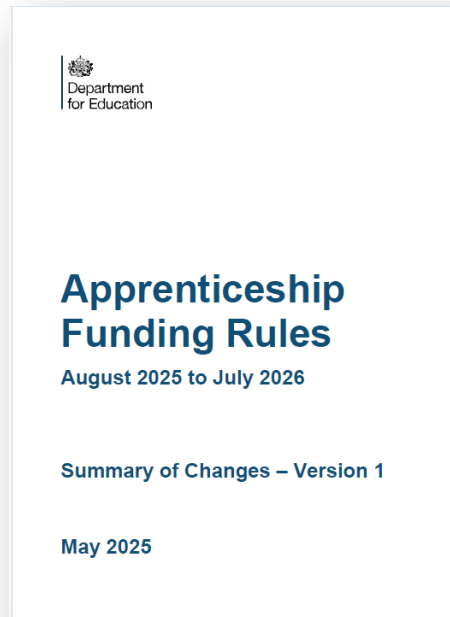
New Rules, Clarifications, Restructures

Impact and Priorities

Resources & Next Steps ahead of August 2025

Documents & Links – For starts from August 1st

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



Off the Job Minimum Hours Rules – Annex C

APPRENTICESHIP FUNDING RULES 2025 TO 2026 (ANNEX C)			
OFF-THE-JOB TRAINING: MINIMUM REQUIREMENT FOR EACH APPRENTICESHIP STANDARD			
VERSION 1			
GUIDANCE			
Further to the changes to the off-the-job training policy, announced in the Apprenticeship Funding Rules 2025 to 2026 Version 1, this document outlines the minimum requirement for off-the-job training for each apprenticeship standard, for an apprentice with no relevant and evidenced prior learning.			
The policy change applies to all new starts from 1 August 2025.			
MINIMUM REQUIREMENTS			
The minimum requirement (of off-the-job training hours) for each apprenticeship standard is on the second tab of this spreadsheet. This replaces the need for the provider to calculate the minimum hours requirement for each apprentice. Providers can plan and / or deliver more than this minimum requirement.			
The off-the-job training policy will remain an absolute policy for 2025 to 2026. To be eligible for government funding an apprentice with no relevant prior learning must receive at least the published volume of off-the-job training hours for the standard (or a reduced figure for relevant and evidenced prior learning). We may recover funds if the minimum requirement is not met.			
We have removed the delivery link between off-the-job training and time on programme. This means that, in agreement with the employer, a provider will be free to deliver the required off-the-job training hours over whatever timeframe they choose (subject to meeting the minimum duration requirement). If the duration of the programme increases or decreases, there will no longer be an impact on the minimum training.			
<	>	Guidance	Minimum Requirements Look-Up Table +

There are 2 rules which apply irrespective of the apprentice's start date:

- Redundancy (paragraphs [274](#) to [278](#));
- Changing to a new version of a standard (paragraphs [289](#) to [303](#)).

UVAC Annotated Copies:

[2025-2026-Funding Rules v1](#)

[2025-2026 Summary of Changes](#)

Rule Change Key:



High Impact/High Risk - direct and immediate impact on funding claim and / or internal budget and resourcing levels



Medium Impact – significant changes to procedures, documentation, evidence, policies



Low Impact – low level changes, or will apply to a small proportion of employers, apprentices or apprenticeships.



High Impact/Low Risk with a positive impact on funding claim and / or internal budget and resourcing levels



Ongoing Queries – To raise with the DfE



Warning – Read the detail

UVAC ANNOTATIONS:

New Rules / Clarifications that are really new rules

Clarifications to Existing Rules

Does not Apply to DA Provision

General new text and moved text

Rule Removals



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OVERVIEW

Overview of Key Changes

- Introduction of **Foundation Apprenticeships**:
 - New section which includes Rules that differ from other apprenticeships
-read through in detail - **All other rules apply**
- **Reduction of minimum duration** from 12 months to 8 months
- **Changes to how OTJ and duration are linked** – or rather, what their separation means
- **No news on L7 :**
 - ‘We’re continuing to review the funding options for **level 7 apprenticeships** and **how it aligns with our skills priorities**. The Department for Education will make decisions about affected apprenticeships in due course, with updates published [here](#)’.
- Confirmation but no operational detail **on Improvements to EPA**

Overview of Changes

- **Confirming English and maths requirements and active learning.**
 - Evidence and gateway requirements for apprentices aged 19+
 - Requirement that active learning for English and maths must take place in line with the training plan, for all apprentices who study English and maths.
- **Additional payments**
 - Details of final payment schedule for foundation apprentices or who are on an apprenticeship standard which has a published typical duration of less than 12 months.
- **Annex A Residency eligibility criteria.**
 - Pre-Settled Status through the EU Settlement Scheme are eligible for funding; asylum seekers are not.
- **EPA is changing its role and function**

ANNEXES

ANNEX	Content	Page/ Para
A: Residency Eligibility Criteria	7 Clarifications on residency eligibility criteria	P 120 - 133
B: Revisions to apprenticeship assessment	Guidance for contracting, delivery and administration of Apprenticeship Assessment PA for both integrated and non-integrated apprenticeships.	P 134- 138
Glossary Added / amended definitions of the following terms: Accelerated apprenticeship, Active learning, Adult Skills Fund, Apprenticeship service record, Apprenticeship Technical Funding Guide, Care leavers' bursary, Complete early, Employer incentive payments, End-point assessment, Final day, Foundation apprenticeship, Gateway requirements, (The) Institute, New provider status (APAR), Off-the-job training, On-programme End-point Assessment, Person of significant control, Prior learning, Prison leaver, Published typical duration, Summary of training document, Total negotiated price (TNP).		P 139 - 159
C: Minimum OTJT hours for each Standard	New starts from 1 August 2025, the spreadsheet published as Annex C shows the <u>minimum</u> OTJT hours for each standard. This replaces the need for providers to calculate the volume of hours that would comply with the OTJT policy.	Separate document and is a temporary arrangement due to the transition of the Institute's website to Skills England.

Summary of Changes – End Point 'Apprenticeship ASSESSMENT' Principles

- Assessment is more proportionate to the competency being tested and removes any duplication
- Where appropriate, assessment plans can be designed to allow assessment to take place on programme
- Where appropriate, training providers will be able to deliver elements of the assessment. End-point Assessment Organisations (EPAOs) will continue to shape the assessment and ensure the validity of outcomes.
- These changes will apply to all apprenticeships at all levels, with existing assessment plans being rewritten on a standard-by-standard basis from April 2025.
- **Para 10** Those providers and employers who are delivering apprenticeship standards where the assessment plan has been revised under the new apprenticeship principles must refer to Annex B of these rules.

Summary-EPA/Apprenticeship Assessment

– ANNEX B

Terminology - EPA for current EPA Plans then Apprenticeship Assessment for those with the new EPA designed to meet the Principles:

- The written agreement between the provider and the assessment organisation must include arrangements for the delivery of ALL elements of apprenticeship assessment in accordance with the revised assessment plan.
- An apprentice can only undertake their final apprenticeship assessment after: [...] They have met the minimum duration of the apprenticeship practical period (see paragraph 71)
- The assessment organisation, and the awarding body in the case of mandatory qualifications, must ensure that the apprenticeship assessment methods, involve someone from the occupation in the delivery and grading decision who has not been involved in the training element of the apprenticeship

Oddities

- for an integrated degree, in order to remain independent, the apprenticeship assessment must involve someone from the occupation in the delivery and grading decision who has not been involved in the training element of the apprenticeship

Summary – OTJT and Duration

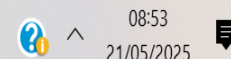
- **Minimum Off-the-job training (OTJT)**
- **Active Learning is now two separate terms – OTJT Active Learning and English and Maths Active Learning (p269)**
 - A minimum OTJT hours value now applies to each specific Standard – See Annex C
 - This is a **temporary measure**, but an absolute policy for 2025/02026 due to IfATE's transition to Skills England....No more calculations !
 - Hours based on current durations, typical duration and actual time on programme), volume of planned and actual hours being reported in the ILR by providers.
 - 2025/26 is a transition year - data gathering and working with partners to assess if the volumes are reflective of actual delivery.
- **Removal of the between OTJT and time on programme:**
 - Deliver the OTJT hours over whatever time-frame you chose (over the Minimum)
 - If the duration on programme changes there will no longer be a requirement to adjust the minimum OTJT requirement
- **Part-time learner durations** do not need to be automatically extended

Off the Job Training Minimum Hours for each Standard - ANNEX C

Standard code	Apprenticeship name	Level	Version (at 27/04/25)	Status	Maximum funding (£)	Off-the-job training - minimum requirement (hours)
ST0761	Agriculture or horticulture professional adviser	6	1	Approved for delivery (paused for	£14,000	509
ST0534	Architectural assistant (integrated degree)	6	1.1	Approved for delivery	£25,000	1114
ST0668	Assistant buyer and assistant merchandiser	6	1	Approved for delivery	£10,000	466
ST1314	Biomedical scientist	6	1.1	Approved for delivery	£27,000	835
ST0426	Broadcast and media systems engineer (integrated degree)	6	1.1	Approved for delivery	£24,000	835
ST0652	Building control surveyor (integrated degree)	6	1	Approved for delivery	£24,000	1022
ST0372	Building services engineer	6	1.1	Approved for delivery	£27,000	1392
ST0423	Business to business sales professional (integrated degree)	6	1	Approved for delivery	£21,000	835
ST0694	Career development professional	6	1	Approved for delivery	£9,000	509
ST0244	Chartered legal executive	6	1.1	Approved for delivery	£27,000	1022
ST0272	Chartered manager (degree)	6	1.1	Approved for delivery	£22,000	926
ST0331	Chartered surveyor (degree)	6	1.2	Approved for delivery	£27,000	1044
ST0527	Church minister (integrated degree)	6	1.1	Approved for delivery	£22,000	835
ST0417	Civil engineer	6	1.1	Approved for delivery	£27,000	1205
ST0609	Clinical trials specialist (degree)	6	1	Approved for delivery	£26,000	1392

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OTJT Hours / Months Matrix – ANNEX C

	Off-the-job training (OTJT) hours	Approximate months to deliver (Based on 6 hours per week (20%))	Approximate months to deliver (Based on 7.5 hours per week (25%))	Approximate months to deliver (Based on 9 hours per week (30%))	Approximate months to deliver (Based on 10.5 hours per week (35%))	Approximate months to deliver (Based on 12 hours per week (40%))	Approximate months to deliver (Based on 13.5 hours per week (45%))	Approximate months to deliver (Based on 15 hours per week (50%))
12								
13	187	8	-	-	-	-	-	-
14	209	9	-	-	-	-	-	-
15	230	10	8	-	-	-	-	-
16	257	11	9	-	-	-	-	-
17	278	12	10	8	-	-	-	-
18	300	13	10	9	-	-	-	-
19	326	14	11	10	9	-	-	-

Ready Accessibility: Good to go

Guidance Minimum Requirements Look-Up Table +

Display Settings

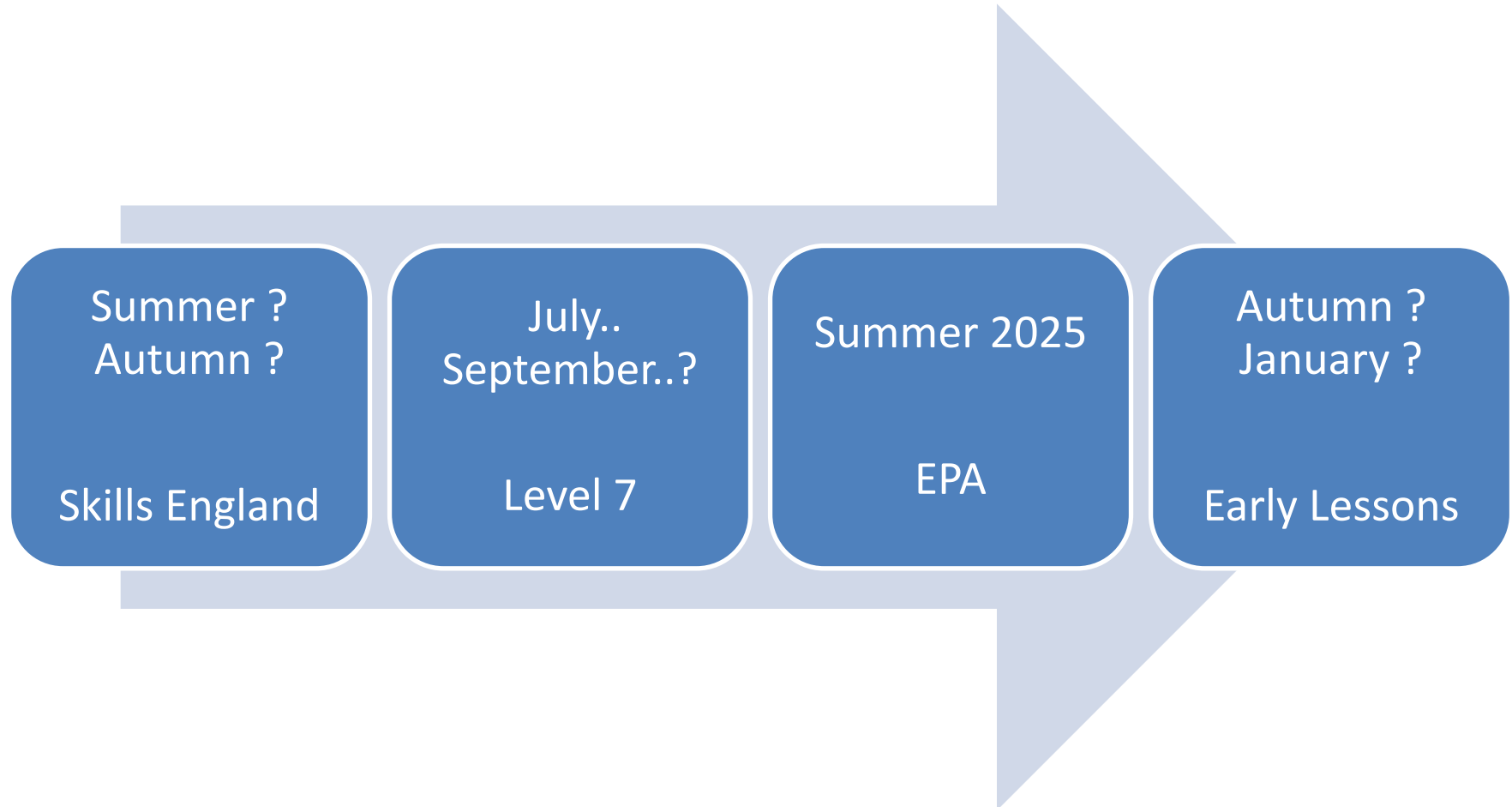
POLL

Q. Which 2025 change do you think is likely to have most impact ?



IMPACT & PRIORITIES

This is not going to be the only set of Rules for 2025/2026



Impact & Themes

Implementing iterative changes

The document is very repetitive – feels like unfinished policy

There are some significant opportunities...

BUT what about the alignment with AAF, Audit, and most importantly Ofsted EIF..?

Impact & Action Priorities

A recalibration of the core programme

- Duration now a fixed figure by Standard
- OTJ decoupled from duration
- English and maths not mandatory for 19+
- Think carefully where duration can be lengthened and shortened

Onboarding needs an end to end review

- A fragmented journey / set of processes
- OTJ Simplification - No calculations, fewer errors, less issues with end dates and the ILR employer contribution
- Skills Scans need a major overhaul
- Parity between part-time and full-time employees

Documents need a refresh

- Briefing and information to employers and apprentices (and staff) needs to be different immediately
- More declarations and additional evidence needed

NEW RULES

Practical Period & Part-time Hours

Para	Rule	ACTIONS
Page 38 Para 71 <div>M</div>	<p>The provider must confirm that, after all relevant prior learning and experience has been taken into account, the apprenticeship practical period lasts for a minimum duration of 8 months. For example, to satisfy this requirement, an apprentice who starts their training on 1 August 2025 must still be receiving training on 31 March 2026.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Update processes for staff where needed . update policy, procedure and evidence trail <input type="checkbox"/> Update Business Development, and employer / apprentice guidance – update all basic intro literature and handbooks , web pages <input type="checkbox"/> Update onboarding processes and Teams <input type="checkbox"/> Update documentation to remove previous calculations for min hours and update checks and guidance on how the figs are calculated <input type="checkbox"/> Update employer guidance documentation or handbooks on min duration and Annex C <input type="checkbox"/> Review impact on staffing where the process is reduced <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief all teams on the change in policy and procedure
P38/39 Page 73 <div>M</div>	<p>If, at the beginning of the apprenticeship, the apprentice works fewer than 30 hours a week, or has a zero-hours contract, the provider must consider the apprentice's working hours when setting a duration for these learners, so that training expectations are realistic. There is no requirement for the provider to automatically extend the expected duration of the apprenticeship for all part-time apprentices</p> <p>73.1. The provider must agree, with the employer, that the expected duration of the apprenticeship for a part-time apprentice is realistic.</p>	



Minimum OTJ

Para	Rule	ACTIONS
78 Page 42	<p>The minimum volume of off-the-job training for all apprentices (full-time, part-time, term-time), will be published on the front of each apprenticeship standard.</p> <p>(Temporarily, due to the transition of the Institute's website to Skills England, this information can be found in Annex C).[...] . Funds are at risk of recovery if this off-the-job training minimum requirement is not met.</p> <p>Some apprentices and standards will need more than the minimum requirement. Apprentices must receive the volume of high-quality apprenticeship training that they need to develop full occupational competence.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review impact on systems and procedures <input type="checkbox"/> Identify any Standards negatively affected by the hours in Annex C <input type="checkbox"/> Identify any standards where there are curriculum implications / opportunities <input type="checkbox"/> Consider the impact on current skills scans – are there opportunities for some people to speed up delivery and to lengthen delivery to support improved achievement supported by a more detailed skills scan to assess gaps <input type="checkbox"/> Update processes for staff where needed . update policy, procedure and evidence trail
79	<p>To be eligible for government funding the provider must ensure that an apprentice with no relevant prior learning receives at least the published volume of off-the-job training hours for the standard.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review impact on staffing where the process is reduced <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief all teams on the change in policy and procedure



Removal of the link between the minimum OTJ and planned /actual time

Para	Rule	ACTIONS
80 Page 43	<p>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.</p> <p>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, plus one activity per month</p>	<input type="checkbox"/> Must consider very carefully changes to durations and the decoupling of OTJ - it is an opportunity and a possible threat.
82. Pag 44	<p>The provider must document the number of planned off-the-job training hours, for the full apprenticeship, on the apprenticeship agreement, the training plan and the individualised learner record (ILR).</p> <p>82.1 This should be at least the published figure from the standard / Annex C if the apprentice has no relevant prior learning.</p>	



OTJ Training/payment for shorter duration Programmes

Para	Rule	
85-88 P86 page 45 M	<p>'active learning is now OTJT Active Learning - for example</p> <p>The provider is responsible for ensuring that there is a plan for off-the-job training active learning (OTJT active learning) to take place at least every 3 calendar months of the practical period (from the learning start date to the learning actual end date). For example, if delivery takes place on 1 August 2025, OTJT active learning must next take place on or before 30 November 2025.</p>	
P104.2.1 Page 64 See also 105.3.1 M	<p>Where the apprentice is on a shorter apprenticeship (where the published typical duration of the apprenticeship standard is less than 12 months), or on a foundation apprenticeship, this payment will be generated 242 days after the apprentice's learning start date instead. (Note: if the apprentice is on an apprenticeship standard where the published typical duration is 12 months or more, but they complete their apprenticeship in less than 12 months, then this final instalment will not be made).</p>	



Subcontracting

Para	Rule	ACTIONS
226.4.2 M	Providers must not contract with subcontractors not on the APAR and working under the £100,000 flexibility outlined in paragraph 226.4 - must have a current UKPRN, cannot deliver full apprenticeship standards and must not have engaged the ‘Funding higher risk organisations and subcontractors’ policy .	<ul style="list-style-type: none"> <input type="checkbox"/> Review the policy and conduct an assessment on current providers <input type="checkbox"/> Embed the policy in subcontractor due diligence – pre / annually during contract delivery <input type="checkbox"/> Review and update contracts to include terms and notification requirements
226.5 M	They are not on the published APAR, will only deliver apprenticeship training for the Level 6 Teacher apprenticeship standard and will deliver less than £100,000 of apprenticeship training and on-programme assessment, under contract across accredited initial teacher training main providers and employer-providers, between 1 August 2025 and 31 July 2026.	<ul style="list-style-type: none"> <input type="checkbox"/> NOTE_ new working includes the new email address for exemption requests



Prisoner Apprenticeships / NEET

Para	Rule	ACTIONS
259.1 Page 105	Prisoner apprentices may undertake end-point assessment prior to release. This applies to: Prisoner apprentices who are enrolled on an apprenticeship whilst on Release on Temporary License (RoTL); and Prisoner apprentices enrolled on an apprenticeship in the closed estate whose release date is within 2 years.	<input type="checkbox"/> Review current policies and procedures and update <input type="checkbox"/> Conduct review of current apprentices/apprenticeships
266 Page 107	<p>Where a 16–17-year-old apprentice is at risk of becoming a NEET (not in education, employment or training), providers must Offer IAG support to any apprentice who is at risk of withdrawing from their apprenticeship earlier or who is at risk of not remaining in employment following completion of their programme.</p> <p>This also includes both education and local employment opportunities.</p> <p>Comply with their statutory duty to notify the relevant local authority of any 16-17-year-old who is no longer participating in training and is at risk of becoming NEET (this will enable them to access the local authority support systems).</p>	<input type="checkbox"/> Train staff <input type="checkbox"/> Update advice to apprentices

M





CLARIFICATIONS

CLARIFICATIONS: Learner Eligibility

Para	Rule	ACTIONS
<p>P 27.3 Page 8</p> <p>M</p>	<p>A provider must not claim funding for individuals who: Are a shareholder, director or person of significant control, with no separate identifiable line manager to undertake the role of 'employer' as defined by these funding rules;</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Update guidance for Business Development Teams now <input type="checkbox"/> Update employer briefings / apprentice briefings now <input type="checkbox"/> Update guidance for all <input type="checkbox"/> Update Onboarding paperwork or online questions and checks to ask this specific question - related to role, controls, accountabilities <input type="checkbox"/> Train onboarding team <input type="checkbox"/> Update onboarding procedures and <input type="checkbox"/> Update internal audit checks





CLARIFICATIONS: RPEL / Minimum DURATION

Para	Rule	ACTIONS
Page 13 33 	Text aligned to Policy OTJ/ Duration	<input type="checkbox"/> Update processes and policies for staff where needed to integrate Annex C and agree updated policy, procedure and evidence trail
33.1.1	If there is insufficient content remaining (i.e. less than 8 months or 187 hours), the individual will be ineligible for apprenticeship funding.	<input type="checkbox"/> Update Business Development, and employer apprentice guidance <input type="checkbox"/> Update onboarding processes and Teams <input type="checkbox"/> Update documentation to remove previous calculations for min hours and update checks and guidance on how the figs are calculated
33.2.1 	<p>To calculate the reduction in price the provider must:</p> <p>Calculate the percentage of prior learning that the individual has, as a percentage of the off-the-job training hours that would be delivered to an individual with no relevant prior learning for the same standard. 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).</p>	<input type="checkbox"/> Update employer guidance documentation or handbooks on min duration and Annex C <input type="checkbox"/> Review impact on staffing where the process is reduced <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief all teams on the change in policy and procedure



CLARIFICATIONS: Learning Support English & Maths




Para	Rule Clarification	ACTIONS
34.1 Page 17 	<p>Learning support funding is available to meet the costs (incurred by a provider) of putting in place reasonable adjustments, as set out in section 20 of the Equality Act 2010. This is for an apprentice who:</p> <p>Has a learning difficulty or disability as defined.....[] (this includes where apprentices have opted-in – see paragraph 44) and end-point assessment.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review policy, procedure and processes to confirm that responses to on-programme opt in needs identified are in place and that evidence required is collected at point of expenditure <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief teams and individuals offering advice, conducting assessments and agreeing plans <input type="checkbox"/> Update guidance for employer, apprentice and staff <input type="checkbox"/> Update advice for apprentice and employer <input type="checkbox"/> Brief teams leading on assessment of needs or advice to apprentices or employer <input type="checkbox"/> Confirm that policy, processes and procedures meet this test. <input type="checkbox"/> Brief employer engagement and business development teams on this element of support costing <input type="checkbox"/> Make a decision about whether to assess all apprentices – regardless of 42.1- update on programme reviews / assessment
P44 page 23 	<p>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.</p>	

CLARIFICATIONS: English & Maths



Para	Rule Clarification	ACTIONS
44.1-44.4 Page	<p>44.1 Providers must not claim for any funding for standalone English and / or maths qualifications until training has commenced.</p> <p>43.3/44.2 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.</p> <p>44.3 The provider must deliver the necessary amount of training needed in readiness for the assessment(s).</p> <p>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.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Update policy and procedures for pre/onboarding <input type="checkbox"/> Create opt in / opt out English and Maths declaration and commitment for apprentice and employer / add to the TP <input type="checkbox"/> Update processes and policies for agreeing and tracking the planned schedule in the TP has taken place <input type="checkbox"/> Revisit the Eng/Maths assessment <input type="checkbox"/> Update Business Development on employer commitment now must be as in the plan – must not move delivery and employer apprentice guidance <input type="checkbox"/> Update English and Maths delivery arrangements/ contract to ensure planned training takes place on time onboarding processes and Teams <input type="checkbox"/> Update outcomes summary record/evidence <input type="checkbox"/> Update employer/apprentice guidance documentation or handbooks on min duration and Annex C <input type="checkbox"/> Review impact on staffing where the process is reduced <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief all teams on the change in policy and procedure



CLARIFICATIONS: English & Maths



Para	Rule Clarification	ACTI ONS
P41 Page 21 	. <u>As part of the initial assessment</u> , for all apprentices irrespective of age, the provider must discuss with the employer and apprentice, whether the apprentice will study towards a standalone English and / or maths qualification as part of their apprenticeship.	
P41. 	If the apprentice is 16-18 when they begin their apprenticeship training, and they do not already hold a suitable equivalent qualification (see paragraph 41.3), English and / or maths is a <u>mandatory</u> part of the programme. We will fund the apprentice to achieve up to an approved level 2 qualification in English and / or maths.	
41.2 	If the apprentice is 19+ when they begin their apprenticeship training, and they do not already hold a suitable equivalent qualification (see paragraph 41.3), English and / or maths is an <u>optional</u> part of the programme. We will fund the apprentice to study towards up to an approved level 2 qualification in English and / or maths, if their employer agrees for them to complete it as part of the programme. Providers must make apprentices fully aware that we will still fund them to study towards English and / or maths where their employer agrees that it should be part of the training plan.	

CLARIFICATIONS: English & Maths

Para	Rule Clarification
41.2.1 Page 22 	Note that if English and / or maths is a regulatory requirement or is an essential component of any mandatory qualification and forms part of the apprenticeship gateway requirement, it must be completed and evidenced as part of gateway requirements. This will be made clear on the relevant apprenticeship standards.
P41.3 P41.4	Acceptable equivalents are set out in a published list on GOV.UK. If an apprentice is a restart onto the same apprenticeship programme, they will be subject to same age-based eligibility criteria as to when they left the programme.
42 42.1 	The provider must document this discussion, and the decision made, as part of the initial assessment outcome for all learners. If the apprentice already holds a suitable equivalent qualification or where the employer does not agree, for a standalone English and / or maths qualification to be included as part of the programme (19+ learners only), there is no mandatory requirement for the provider to carry out a diagnostic assessment or seek evidence of the apprentice's prior attainment level.





CLARIFICATIONS: Initial Assessment Outcomes / Bursary

Para	Rule Clarification / REINSTATED TEXT from 23/24	ACTIONS
57 Page 29 	<p>After completing the initial assessment, the provider must be able to evidence that the individual requires significant new knowledge, skills and behaviours in order to be occupationally competent in their job role, and that the training required meets the funding rules. They must discuss or share the outcome of the initial assessment with the individual and their employer, so that all parties understand the results and how these results will inform a tailored training plan for the apprentice.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Review the onboarding end to end and streamline assessments, employer checks and declarations <input type="checkbox"/> Update TP and other mandatory documentation as needed to encompass the requirements in this section. <input type="checkbox"/> Update procedures <input type="checkbox"/> Check wording on Bursary declaration, application form or where apprentices signs to confirm they have been given the opportunity to declare <input type="checkbox"/> Update guidance and advice for employer and apprentice <input type="checkbox"/> Train all staff
64.4 Page 30 	<p>The provider must give the learner the opportunity to declare their eligibility for the care leavers' bursary, if the apprentice is aged 24 or younger (also see paragraph 103). [This should be done before or when the apprenticeship starts so that the payments can support the apprentice as soon as possible.]</p>	

CLARIFICATIONS: Apprenticeship Agreement/EPA Costs



Para	Rule Clarification	ACTIONS
64 Page 34	<p>Unless the apprentice is on an alternative English apprenticeship, the provider must have evidence that the apprentice has an apprenticeship agreement with their employer, from the start of and for the actual duration of their apprenticeship.</p> <p>64.4 The agreement must be extended if the programme is extended.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> review all monitoring and governance tracking for predicted and actual PPED apprentices-check that the monitoring and reporting is sufficient and these are identified in time to raise the updated documentation. <input type="checkbox"/> Update processes and policies for agreeing and tracking the planned schedule <input type="checkbox"/> Update employer/ apprentice guidance, documentation or handbooks <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief all teams on the change in policy and procedure
P94.2 Page	<p>Eligible costs for end-point assessment are agreed by the provider and employer for integrated standards and by the provider (or employer) and the end-point assessment organisation for non-integrated standards.</p> <p>This is included by the provider in field TNP2 (on the ILR), but only when the cost is known; estimate costs must not be entered.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Update employer/ apprentice guidance, documentation or handbooks <input type="checkbox"/> Update evidence pack checklist <input type="checkbox"/> Brief all teams on the change in policy and procedure

CLARIFICATIONS:

Para	Rule Clarification	ACTIONS
158.2 	Providers must have :Reported the cash value of the employer co-investment on the ILR, by their final ILR submission within the academic year that the apprentice completes.	<input type="checkbox"/> Check processes for monitoring employer co-investment are keeping pace and will ensure funds are collected on time , particularly for those with an R11/R12 completion date
182/ 184.4 	Where there is a change of employer, and the apprenticeship originally started prior to 1 April 2024, then the co-investment waiver will no longer apply meaning the new employer will be liable to pay co-investment (regardless of the apprentice's age at the time (this also covers where an apprenticeship re-starts with a new employer).	<input type="checkbox"/> Review and update policy and procedures <input type="checkbox"/> Update employer and apprentice guides / handbook <input type="checkbox"/> Train key staff involved in the process



CLARIFICATIONS:

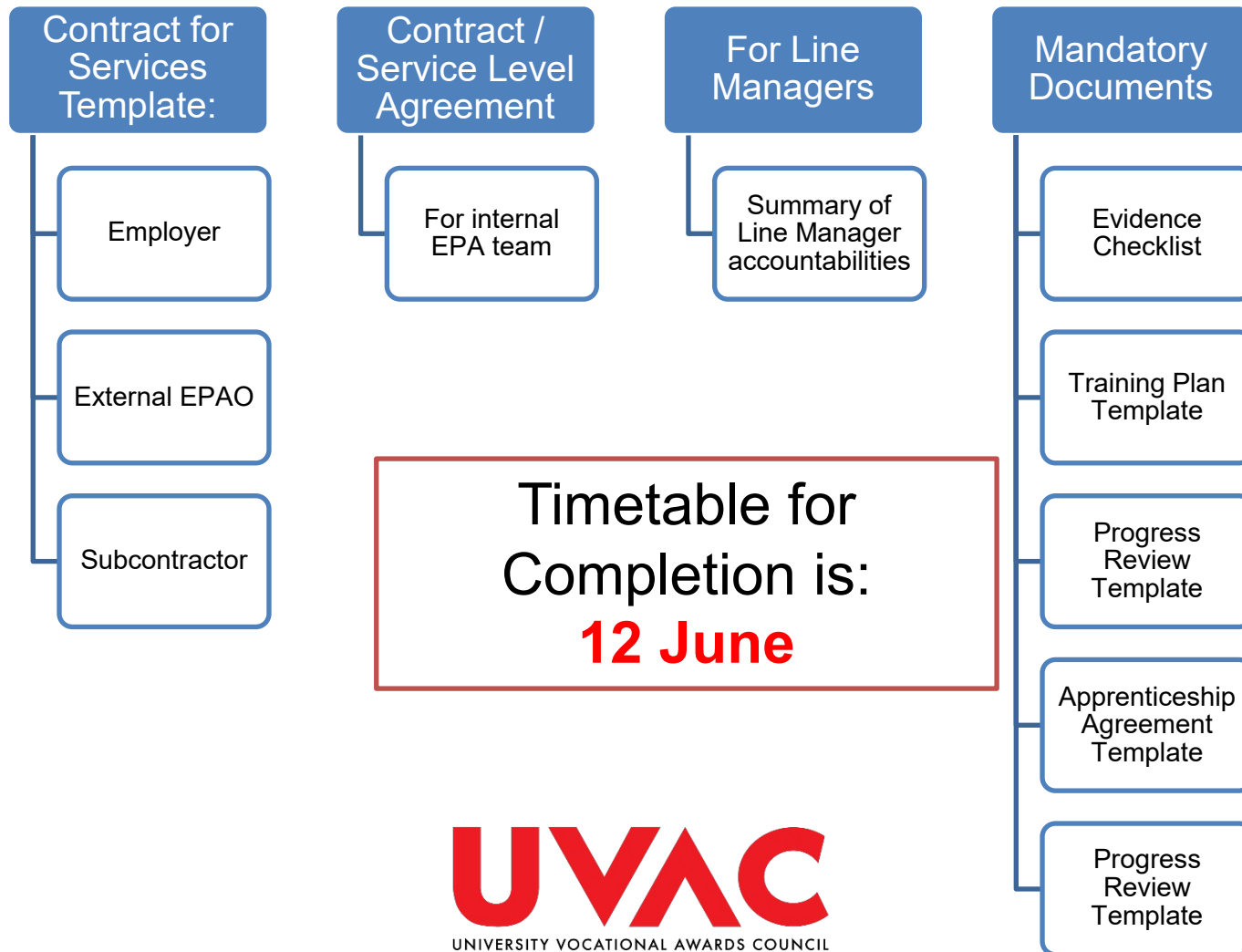
Para	Rule Clarification	ACTIONS
188  	.Where funding is paid for an apprentice who does not subsequently meet the relevant qualifying period, we will recover the funding from the provider. This includes any funding for learning support. Where applicable, funds will be returned to the employer's apprenticeship service account.	<input type="checkbox"/> Consider whether you have high rates of apprentices with ALS meeting this scenario. If so; strengthen the selection process to reduce early pre 42 day leavers



MANDATORY DOCUMENTS

UVAC Templates 2025/2026

- Available for the start of the 2025/2026 Funding Year or as they are completed on receipt of 2025/2026 UVAC Membership Fee/ PO



UVAC Membership Support

MAY

- Email your feedback and queries about the Rules for the UVAC discussion with DfE to R.Rhodes@bolton.ac.uk

JUNE

- UVAC contract templates available for Members who renew for the 2025/26 year
- Summer webinar programme starts

JULY

- UVAC contract templates available for Members who renew for the 2025/26 year

AUG

- Rules Update Webinar.....Just in Case... scheduled for Tuesday 5th Aug

RESOURCES & NEXT STEPS

Go to the [Events Page](#) for the latest webinar programme

MEMBERS EVENT PROGRAMME BY DATE – click on the link to book on the Next Members Funding Rules session and see the [UVAC Events Page](#) for the rest of the Summer 25 Webinar Series

	Topic	Content	Registration Link
8.	ESFA Funding Rules – Final Rules	This session is a 'hold the date', pending announcements of any further changes to the Funding Rules ahead of the start of the 2025/26 funding year. We are anticipating a range of reissues of the Funding Rules this year as different aspects of the announced changes to the apprenticeship programme are implemented..... this session is likely to be the first of several short updates over 2025/2026.	<u>Tue 5 August</u> <u>9.30 – 11.00</u>

Questions & Further Information



Click [HERE](#) for Today's Listen Again Webcast



Resources - Annotated Copies
[2025-2026 Funding Rules](#)
[2025-2026 Summary of Changes](#)



Queries and Questions about the Funding Rules and UVAC Templates to: R.Rhodes@bolton.ac.uk



Book onto the final 2025/26 'just in case' Funding Rules Webinar [HERE](#)
DATE: Tuesday 5th Aug
TIME: 9.30 – 10.30

Recording Timestamps

Funding Rule Release – Themes and Implications Overview of key changes	00:00:00
New Rules	1:07:00
Clarifications	1:14:00
Future Themes Resources & Next Steps	