

WEST MIDLANDS COMBINED AUTHORITY

SKILLS PROGRAMMES FUNDING RULES 2024/2025 (For the funding year 1 August 2024 to 31 July 2025) Version 3

This document sets out the funding rules that apply to all providers of education and training who receive Skills Programmes funding, including but not limited to Adult Education Budget, Free Courses for Jobs (FCFJ), Multiply, National Skills Fund Technical Bootcamp and/or Traineeships funding for residents, residing in the West Midlands Combined Authority (WMCA) area. Additional guidance on these programmes will be given in their own documents listed in [Annex D](#). Providers must read these in conjunction with the Skills Programmes Funding Rules.

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WMCA Skills Programmes Funding Rules. Key Changes for 2024/25

Area	Link	Overview of change	Version changed
FCFJ	Free Courses for Jobs (FCFJ) additional Funding Rules	Please note a change of LDM code for FCFJ for learners who meet the earnings threshold criteria or are unemployed (391)	3
Low Wage	Residents in receipt of low wage.	Aligning the low wage threshold with median full-time earnings for the WMCA area, WMCA has increased the Low wage threshold to £32,000. This will make training more affordable and accessible for workers on low incomes, thereby supporting social mobility	3
Into Employment	Into employment	<p>Clarifications:</p> <p>Additional clarification on Into Employment methodology.</p> <ul style="list-style-type: none"> The core programme must include. <ul style="list-style-type: none"> Occupational-specific training Employability support and transferable skills Job interview at the end of the programme Work experience is funded separately and should not be used to extend the core programme length. Wrap-around should not be used for any core element of the programme. This includes elements such as registration costs, examination fees, or any other activities or materials that are necessary for the learner to complete their studies. Providers are expected to have a policy on how wrap-around support is identified and costed. 	2
Residency	Residency	<p>Eligibility and Residency amendments</p> <ul style="list-style-type: none"> those with indefinite leave to remain must meet the 3-year residency rule unless they are a victim of domestic abuse or a bereaved partner. colleges must ensure visa holders can complete their course when the visa is due to expire. learners should remain in England throughout their learning. Providers will not have the discretion to continue funding where a learner is outside the country even in temporary/emergency circumstances. minor clarification for family members in the case of marriage, that marriage has to have been at the point that their indefinite leave to remain was granted 	2
Skills Bootcamp Wave 5	Skills Bootcamp	<p>Updated for Wave 5 funding methodology, main changes include:</p> <ul style="list-style-type: none"> Digital Skills Bootcamps will now be a minimum of 100 GLH (unless it is a Pathway to Accelerated Apprenticeship in which case 60 GLH is acceptable) The Payment Schedule and Milestones have been aligned as per the DfE model (40/30/40). Milestone 1 minimum qualifying period has been increased to 14 days 	2
Construction Gateway	Construction Gateway	<p>Update to the Construction Gateway methodology including:</p> <ul style="list-style-type: none"> Clear phased approach to funding Introduction of a shorter phased 1 programme for those closer to the labour market Inclusion of Wrap around funding to support residents. 	2
Evidence pack	Evidence	<p>Clarification:</p> <p>Additional requirements have been added to the evidence section to confirm:</p>	1

		<ul style="list-style-type: none"> Providers must have evidence that residents have been informed of the relevant Whistleblowing and complaints Policies. Providers must include as part of the evidence pack - Initial CEIAG, including how the programme/aim will support the resident. Providers must ensure the paperwork includes WMCA branding. Providers must hold evidence for all claims under learner, learning support fund and wrap-around support. For formula-funded nonregulated provision, an in-house certificate should be produced to show the learning undertaken has been achieved. This should be signed and dated by the awarding provider. 	
Strategy Intent	Programme elements	<p>In line with our skills programme strategy, we have divided the programme overview into four elements.</p> <ul style="list-style-type: none"> building strong and inclusive communities. providing a good education up to level 2. supporting residents into employment and supporting career progression. meeting future skills needs through upskilling and reskilling. 	1
Tailored learning (former Community learning)	Tailored Learning	<p>Tailored Learning (former Community learning) will use funding model 11, for new learning from the 1st August 2024 onwards.</p> <p>Any learning that started before August 2024, should continue to be coded to funding model 10 for Community Learning.</p> <p>Learning that will be funded via Tailored Learning includes:</p> <ul style="list-style-type: none"> Tailored Learning dedicated learning aims (former community learning aims) <p>WMCA is not allowing GRANT providers to use 5% of their funding as Tailored Learning</p>	1
Funding Model		<p>Please note in line with the funding change – The funding model number has been amended as below:</p> <ul style="list-style-type: none"> Change from FM10 Community learning to FM11 Tailored learning. Change from FM35 to FM38 for the new Adult Skills <p>Any learning that started before August 2024 should still be coded to funding model 35 (Adult Skills)</p> <p>Learning that will be funded via the Adult Skills Fund:</p> <ul style="list-style-type: none"> Formula funded learning Non-regulated learning aims. New non-regulated learning aims (those created specifically for WMCA) New regulated learning aims (those created specifically for WMCA) 	1
Outcomes linked to Skills Bootcamps	Skills Bootcamps	<p>Clarification on Skills Bootcamp outcomes:</p> <p>Government investment in skills training is done with the intention of driving up UK productivity, thus offering a value for money for Government investment, therefore we expect the outcome to be linked to jobs within the UK.</p>	1

Strategy intent	Programmes
Provide a good education up to level 2	<ul style="list-style-type: none"> - Functional Skills (English, Mathematics) - Basic Digital Skills (including digital entitlement) - English Language Acquisition - Vocational Qualifications and non-regulated provision - Numeracy Programmes
Moving residents into good jobs	<ul style="list-style-type: none"> - Into Employment Programmes (Sector-based Work Academy Programmes, Sector Gateway, and Construction Gateway) - Pre-Apprenticeships
Upskilling and Reskilling	<ul style="list-style-type: none"> - Level 3 Qualifications including FCFJ - Skills Bootcamps
Building Stronger Communities	<ul style="list-style-type: none"> - Tailored Learning (former Community learning) - Prince trust

Section 1. Introduction and purpose of the document

1. Introduction

- 1.1. From 1st August 2019, the West Midlands Combined Authority (WMCA) became responsible for certain adult education functions of the Secretary of State under the Apprenticeships, Skills, Children and Learning Act 2009. This transfer of functions was achieved by way of orders made under the Local Democracy, Economic Development and Construction Act 2009 and the West Midlands Combined Authority (Adult Education Functions) Order 2018 (SI 2018/1144)
- 1.2. This document sets out the West Midlands Combined Authority (WMCA) Skills Programmes Funding Rules (Funding Rules) for the 2024 to 2025 funding year (1 August 2024 to 31 July 2025).
- 1.3. The Funding Rules consist of the rules and guidance for the following funding streams; Adult Education Budget (AEB), Free Courses for Jobs (FCFJ), Multiply, and the National Skills Fund (NSF) Technical Bootcamps.
- 1.4. These Funding Rules apply to all providers of education and training who receive either devolved AEB funding or delegated FCFJ or NSF Technical Bootcamp funding from the WMCA.
- 1.5. Additional guidance on the delivery of programmes funded through the above-mentioned streams may be given in programme-specific documents listed in [Annex D](#). Providers must read these in conjunction with these Funding Rules.
- 1.6. These Funding Rules apply to all residents in the WMCA area starting new learning aims on or after 1 August 2024. The WMCA will also have responsibility for continuing residents who commenced learning in 2023/2024 (except 19 – 24 Traineeships). You must ensure You meet the cost of continuing learners within your WMCA Skills Programmes allocation.
- 1.7. These funding Rules do not apply to apprenticeships, advanced learner loans or to 19 to 24 traineeship programmes that began before 31 July 2023.
- 1.8. The Education and Skills Funding Agency (ESFA) will continue to fund apprenticeships and advanced resident loans for WMCA residents – You can access these separate funding rules on the [GOV.UK website](#)
- 1.9. This document forms part of the terms and conditions of WMCA funding and you must read and comply with them in conjunction with your funding agreement.
- 1.10. You must operate within the terms and conditions of the funding agreement, these funding rules, the [Performance Management Framework](#), and the [Skills Programme Coding guidance](#), and the Individualised Learner Record (ILR)

specification. If you do not, you are in breach of your funding agreement with WMCA.

- 1.11. All information, including any hyperlinks, are correct at the time of publishing. this document will be kept under review to reflect how WMCA may need to respond to the changing economic context.
- 1.12. The WMCA reserves the right to make changes to these funding rules and will publish any updated versions on the [WMCA website](#). It is your responsibility to ensure that you regularly visit the [WMCA website](#) and comply with the current version of these funding rules.

2. Understanding the terminology

- 2.1. The terms 'WMCA', "Our" "Us", and "We" refer to the West Midlands Combined Authority.
- 2.2. When WMCA refers to 'You', "Your" or 'Providers', this includes but is not limited to Colleges, Sixth Form Colleges, independent training providers (ITPs), voluntary community sector providers and Local Authorities who receive funding from Us to deliver adult education and training to WMCA residents.
- 2.3. WMCA will use the generic terms 'You', "Your" or 'Provider' unless the requirements only apply to a specific provider type.
- 2.4. We use the term 'Agreements' to include:
 - 2.4.1. conditions of funding (grant).
 - 2.4.2. grant funding agreement/grant agreement.
 - 2.4.3. contract for services
- 2.5. We use the terms 'resident' and 'learner' to cover the individuals who are receiving services funded by Us.
- 2.6. If We refer to qualifications, these will either be from the Regulated Qualifications Framework (RQF) or will be an Access to Higher Education Diploma recognised and regulated by the Quality Assurance Agency (QAA).
- 2.7. If We refer to 'learning aims', We mean a single episode of learning which could be a regulated qualification, a component of a regulated qualification or non-regulated learning.
- 2.8. If We refer to 'programmes', We mean a coherent package of learning which may include regulated qualifications, components of regulated qualifications or non-regulated learning with clearly stated aims to support agreed outcomes.
- 2.9. Key definitions used and a full glossary of terms is included in [Annex A](#).

3. Contacting us

- 3.1. You can contact us through our query mailbox at skills.programmes@wmca.org.uk
- 3.2. You can also contact your assigned Skills Delivery Officer.
- 3.3. For Multiply queries use mailbox UKSPF@wmca.org.uk

- 3.4. For data queries, You can contact aebdatareturns@wmca.org.uk
- 3.5. For queries on Quality and Compliance, You can contact qualityandstandards@wmca.org.uk

Section 2. Skills Programmes Learner Eligibility

4. WMCA Skills Programmes 'Who We Fund'

- 4.1. Providers **must** make sure an individual is eligible before claiming funding. It is Your responsibility to check the eligibility of the resident at the start of each adult learning aim, and only claim funding for eligible residents.
- 4.2. To be funded by the WMCA, residents must meet the following criteria:
 - 4.2.1. On the first day of learning, a resident must be aged 19 or older on 31 August within the 2024 to 2025 funding year, reside in a dwelling with a WMCA postcode and meet the conditions of funding set out in the [Eligibility section](#) of this document.
- 4.3. Residents who do not have an eligible WMCA postcode will not be funded by the WMCA. This does not mean, however, that they may not be eligible for funding from the Combined/Local Authority area in which they reside should You have a contract in those areas.
- 4.4. The WMCA recognises that a resident (from outside) of the WMCA who is unaware of the funding changes due to the devolution of the Skills Programmes, may wish to undertake learning in the WMCA. Most grant providers will have an AEB allocation from the Department for Education (DfE) for non-devolved areas.
- 4.5. Where a grant provider does not have an allocation from the DfE, then We will discuss directly with the Provider if the resident can be supported. We expect these cases to be minimal but will keep this under review and seek feedback from You during the year.
- 4.6. To support in identifying which postcodes fall under WMCA funding the ESFA postcode checker can be found on the Gov.UK under [Adult Education Budget \(AEB\) postcode files](#).
- 4.7. The age of the learner on 31st August in the funding year determines whether the learner is funded through WMCA's Skills Programmes methodology (for individuals aged 19 and over), or the EFSA's [16 to 19-year-olds funding methodology](#) (for individuals aged 16 to 19 and those aged 19 to 24 with an Education and Health Care Plan).
- 4.8. All individuals aged 19 or over on 31 August who are continuing a programme they began aged 16 to 18 ('19+ continuers') will be funded through the ESFA [16 to 19-year-olds funding methodology](#).
- 4.9. Where the WMCA refers to a resident's age being 19, this relates to the resident being aged 19 on the 31st August within the funding year they start a learning aim. For all other purposes, the age of the resident is taken at the start of each learning aim.

- 4.10. Residents will be eligible for funding for the whole of the learning aim or learning programme if they are eligible for funding at the start, even if the duration is over one year. You must reassess the resident's eligibility for funding for any further learning they start.
- 4.11. If an individual starts a learning aim or programme and is not eligible for funding, WMCA will not fund their learning while they remain ineligible.
- 4.12. When We refer to the Employment Status of the learner, this relates to the learner's status on the day they begin their programme of learning.
- 4.13. You must not fund a learner who is unable to complete a learning aim or programme of study in the time they have available e.g., those starting work/university. Any learner of any age must be able to achieve the learning aim or programme of study within the time they have available.

Section 3. Skills Programmes Residency eligibility

5. Overview

- 5.1. Residents of the WMCA area will be eligible for funding for Skills Programmes if they meet the criteria in the [‘who we fund’](#) section, the learning is taking place in England, and they fulfil the residency requirements set out below.
- 5.2. You must check the eligibility of a learner, including where they resided, at the start of each learning aim and only claim funding for eligible learners.
- 5.3. Unless otherwise stated, individuals must be ordinarily resident in the UK on the first day of learning to meet the residency requirements.
- 5.4. Please refer to the glossary definition of ‘learner residency’ and the devolution [postcode checker data set](#).

6. Learners who live in Wales, Scotland, Northern Ireland or outside of the WMCA.

- 6.1. Wales, Scotland and Northern Ireland have their own funding arrangements. You must develop arrangements with the relevant devolved administration if you are planning to deliver a significant quantity of learning to learners who do not live in England.

7. Residents outside of the WMCA

- 7.1. You must not actively recruit learners who live or work outside of the West Midlands Combined Authority areas.

- 7.2. Residents living in residences that do not have an eligible WMCA postcode will not be funded by the WMCA.
- 7.3. They may be funded via the relevant Mayoral Combined Authority (MCA), Greater London Authority (GLA) or ESFA, provided they meet the appropriate eligibility criteria.
- 7.4. For learning delivered through Skills Bootcamps funding at an employee's workplace, We will fund individuals whose main employment or normal place of work is in the WMCA area.

8. Temporary residence in the UK for educational purposes

- 8.1. People who have been resident in the UK solely for the purposes of receiving full-time education would not be deemed ordinarily resident in the UK and are therefore not eligible for funding unless they meet one of the other eligibility criteria.

9. Temporary absences from the UK

- 9.1. Learners who are temporarily outside of the UK for reasons such as education, employment, or a gap year, but remain settled in the UK, should be considered ordinarily resident in the UK.
- 9.2. Individuals who reside in areas of WMCA and England, and who work outside of England as part of their job, are eligible for WMCA-funded Skills Programme funding as long as some of the learning takes place in England. You cannot claim for the additional expense of delivering learning outside of England.
- 9.3. Where learners move outside the UK during their course, you must cease funding them. This applies also to distance learning – you should only fund distance learners who meet the residency criteria, and you should expect that they remain in the UK for the duration of their course even if no attendance at a physical location is required. If a learner is temporarily absent from the UK, for example for a family event, for a short period, for example, a week or less, then they may continue their distance learning course while overseas. If they will be absent for a longer period, then you should not fund them to continue their learning while overseas.
- 9.4. British armed forces, Ministry of Defence (MoD) personnel or civil crown servants on postings outside of the UK, or people who are resident in England but work outside England, can also be treated as ordinarily resident in the UK.

10. Learners who have applied for an extension or variation of their immigration permission.

- 10.1. Any person who has applied for an extension or variation of their current immigration permission in the UK is still treated as if they have that leave. This only applies if the application was made before their current permission expired. Their leave continues until the Home Office decide on their immigration application. Their leave will continue where they have appealed or sought an administrative review of their case within the time allowed to them for doing so.
- 10.2. Therefore, a person is considered to still have the immigration permission that they held when they made their application for an extension, administrative review or appeal, and their eligibility would be based upon this status.
- 10.3. The learner's immigration permission in the UK may have a 'no recourse to public funds' condition. Public funds do not include education or education funding. Therefore, this does not affect a learner's eligibility, which must be decided under the normal eligibility conditions.

11. Learners with limited length visas

- 11.1. Providers must not fund learners who would not have enough time on their visa to complete their course and who do not intend to, or would not be eligible to, renew their visa. Where a course continues past a learner's visa expiry date, providers may at their discretion fund that learner only where they have a high degree of certainty that a learner intends to (and will be eligible to) renew their visa.
- 11.2. Learners will have an eligible residency status if they meet the conditions laid out in one of the following sections:

12. Categories of residency eligibility


- 12.1. Learners will have an eligible residency status if they meet the conditions laid out in sections 11 to 25 below:

13. United Kingdom (UK) nationals and other persons with right of abode

- 13.1. UK nationals or other persons with a right of abode¹ who have an eligible residency status if they have been ordinarily resident in the UK or the British Overseas Territories, or the Crown Dependencies (Channel Islands and Isle of Man) for at least 3 years preceding the first day of learning.
- 13.2. All family members of UK nationals must meet the required residency eligibility criteria in their own right, unless they meet the criteria in the section entitled “UK nationals in the EEA and Switzerland”, or the criteria in the section entitled “Family members of an eligible person of Northern Ireland”.
- 13.3. The British Overseas Territories are listed in [Annex A: eligibility for funding](#)

14. UK nationals in the European Economic Area (EEA) and Switzerland

- 14.1. UK nationals who have resided in the EEA, Switzerland or EU overseas territories have an eligible residency status if they:
 - 14.1.1. resided in the EEA or Switzerland, EU overseas territories or Gibraltar by 31 December 2020 (or resident in the UK, having moved to the UK from the EEA, Switzerland, EU overseas territories or Gibraltar after 31 December 2017), and
 - 14.1.2. resided in the EEA, Switzerland, EU overseas territories, Gibraltar, or the UK for at least the previous 3 years on the first day of learning, and
 - 14.1.3. remained ordinarily resident in the UK, Gibraltar, the EEA, Switzerland, or EU overseas territories between 31 December 2020 and
 - 14.1.4. the course starting before January 2028 ²
- 14.2. the EEA includes all the countries and territories listed in [Annex A: eligibility for funding](#)
- 14.3. Family members of UK nationals, where both the UK national and the family member have resided in the EEA, Switzerland, or EU overseas territories, have an eligible residency status if:
 - 14.3.1. both the UK national and the family member resided in the EEA, Switzerland, or EU Overseas Territories by 31 December 2020 (or resided in the UK, having moved there from the EEA, Switzerland, or EU Overseas Territories after 31 December 2017), and
 - 14.3.2. both the UK national and the family member remained ordinarily resident in the UK, the EEA, Switzerland or EU Overseas Territories between 31 December 2020 and the start of the course.

¹ Persons with the right of abode have the right to live and work in the UK without any immigration restrictions. Further details can be found here: [Prove you have right of abode in the UK](#). 

² This refers to the 7-year offer for UK nationals in EEA and Switzerland. More info on the 7-year offer can be found here: [UK nationals in the EEA and Switzerland: access to higher education and 19+ further education](#)

14.3.3. the UK national to whom they are a family member has been ordinarily resident in the UK, EEA, Switzerland, or EU Overseas Territories for at least 3 years on the first day of the first academic year of the course.

14.3.4. the course starts before January 2028

14.4. A “family member” for these purposes is either:

14.4.1. the husband, wife, civil partner of the UK national (principal) or

14.4.2. the child, grandchild, spouse/civil partner’s child, or spouse/civil partner’s grandchild of the UK national (principal) who is either.

a) under 21, or

b) dependent on the principal and/or his/her spouse/civil partner

15. EEA and Switzerland nationals in the UK with EU Settlement Scheme

15.1. EEA and Switzerland nationals who have obtained either pre-settled or settled status under the EU Settlement Scheme (EUSS), and have lived continuously in the EEA, Switzerland, Gibraltar, or the UK for at least 3 years preceding the first day of learning.

15.2. the EEA includes all the countries and territories listed in [Annex A: eligibility for funding](#)

15.3. Although the deadline for most people to apply to EUSS was 30 June 2021, there may be individuals who have reasonable grounds for making a late application to EUSS and there may also be some individuals who have made an EUSS application on time but are still waiting on a final decision on their status from the Home Office, including those that have lodged an appeal. Once a valid application has been made to EUSS (evidenced by receipt of a certificate of application), the applicant will have temporary protection, pending the outcome of that application.

16. EEA and Switzerland frontier workers

16.1. An EEA or Switzerland frontier worker is someone who is employed or self-employed in the UK who resides in the EEA or Switzerland and returns to that residence in the EEA or Switzerland at least once a week.

16.2. Frontier workers, and their family members, have an eligible residency status if they have been ordinarily resident in the UK, EEA and/or Switzerland for at least the previous 3 years on the first day of learning.

16.3. A “family member” of an EEA frontier worker for these purposes is either:

16.3.1. the husband, wife, civil partner of the EEA frontier worker (“principal”) or

16.3.2. the child, grandchild, spouse/civil partner’s child, or spouse/civil partner’s grandchild of the principal who is either.

a) under 21, or

- b) dependant on the principal and/or the principal's spouse/civil partner, or
 - c) dependent parents or grandparents of the principal and/or the principal's spouse/civil partner
- 16.4. A "family member" of a Swiss frontier worker for these purposes is either:
- 16.4.1. the husband, wife, civil partner of the Swiss frontier worker ("principal" or
 - 16.4.2. the child or spouse/civil partner's child of the principal
- 16.5. Unlike other categories, a frontier worker or their eligible family member **does not** have to be resident in the UK on the first day of learning in order to have eligible residency status.

17. Family members of EEA or Swiss national

- 17.1. A family member of an EEA national is eligible for funding if:
- 17.1.1. where required to do so, they have obtained pre-settled or settled status under EUSS and
 - 17.1.2. the EEA national (principal) has obtained pre-settled or settled status under EUSS and has been ordinarily resident in the UK, EEA and/or Switzerland for at least 3 years preceding the first day of learning.
- 17.2. Family members of an EEA or Swiss national can apply to EUSS after 30 June 2021 if they are joining them in the UK on or after 1 April 2021. They have 3 months to apply to EUSS from the date they arrive in the UK. They will have temporary protection and therefore be eligible for funding during those 3 months and pending the outcome of any EUSS application made during that period (and of any appeal). More information on [applying to join a family member in the UK](#) can be found on GOV.UK.
- 17.2.1. A "family member" for these purposes is either:
 - 17.2.2. the husband, wife, civil partner of the EEA national (principal) or
 - 17.2.3. the child, grandchild, spouse/civil partner's child, or spouse/civil partner's grandchild of the EEA principal who is either:
 - a) under 21, or
 - b) dependant on the principal and/or his/her spouse/civil partner, or
 - c) the dependant parent or grandparent of the principal or the principal's spouse/civil partner

18. Irish citizens in the United Kingdom (UK) or Ireland

- 18.1. Irish citizens in the UK or Ireland who have been ordinarily resident in the UK and Islands, and/or Ireland for at least 3 years preceding the first day of learning.

19. Irish citizens in the European Economic Area (EEA) and Switzerland

- 19.1. Irish citizens who:
- 19.1.1. resided in the EEA or Switzerland by 31 December 2020 (or resident in the UK, having moved to the UK from EEA or Switzerland after 31 December 2017), and
 - 19.1.2. resided in the EEA, Switzerland, Gibraltar, or the UK for at least 3 years preceding the first day of learning and
 - 19.1.3. remained ordinarily resident in the UK, Gibraltar, the EEA or Switzerland between 31 December 2020 and the start of the course and
 - 19.1.4. the course starting before January 2028
- 19.2. the EEA includes all the countries and territories listed in [Annex A: eligibility for funding](#)

20. Other non-UK nationals

- 20.1. Non-UK nationals who have been ordinarily resident in the UK and Islands for at least 3 years preceding the first day of learning and:
- 20.1.1. have permission granted by the UK government to live in the UK and such permission is not for educational purposes only, or
 - 20.1.2. have obtained pre-settled or settled status under EUSS.

21. Family members of an eligible person of Northern Ireland

- 21.1. Family members of an eligible person of Northern Ireland³ have an eligible residency status if:
- 21.1.1. they have been living in the UK by 31 December 2020 and
 - 21.1.2. they have obtained pre-settled or settled status under EUSS, and
 - 21.1.3. the eligible person of Northern Ireland (principal) has been ordinarily resident in the UK by 31 December 2020, for at least 3 years preceding the first day of learning.
- 21.2. A “family member” for these purposes is either:
- 21.2.1. the husband, wife, or civil partner of person of the Northern Ireland (principal) or
 - 21.2.2. the child, grandchild, spouse’s child, or spouse’s grandchild of principal who is either.
 - a) under 21, or
 - b) dependent on the principal and/or his/her spouse, or

³ Further information, can be found here: [Apply for an EU Settlement Scheme family permit to join family in the UK: Apply if you’re joining a person of Northern Ireland.](#)

- c) the dependant parent or grandparent of the principal or of the principal's spouse
- 21.2.3. the dependant parent or grandparent of the principle or of the principal spouse/civil partner

22. Long residence

- 22.1. A person who, on the first day of learning, has lived in the UK half their life or a period of 20 years or more, has an eligible residency status.
- 22.2. Learners may be able to prove this status via a confirmed entry date from Immigration Control, verified by the Home Office. Alternatively, they may provide evidence that they have been living in the UK for the period in question. This should ideally be from an official and independent source. Examples could include a signed letter on headed paper from someone in a leadership position at the school they attended, a letter from their GP, wage slips or a P45/P60. Providers funding learners under this category should obtain enough evidence to assure themselves beyond reasonable doubt that the learner was living in the UK for the necessary period.

23. Individuals with certain types of immigration status and their family members including refugees.

- 23.1. Individuals with any of the statuses listed below, or leave under the listed schemes, has an eligible residency status and are exempt from the 3-year residency requirement rule.
- 23.2. In relation to these categories, You must have seen the learner's immigration permission. This would include the biometric residence permit (BRP) and in some cases an accompanying letter from the Home Office

24. Refugee status

- 24.1. Individuals with refugee status, where they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK.
- 24.2. Family members of individuals with refugee status, as defined below:
 - 24.2.1. The spouse or civil partner of a person with refugee status is eligible if all of the following apply:
 - a) they were the spouse or civil partner of the person on the asylum application date, and
 - b) have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK

24.3. The child of a person with refugee status to enter or remain, or of the person's spouse or civil partner, is eligible if all of the following apply:

24.3.1. they were the person with discretionary leave's child or the child of the person's spouse or civil partner on the asylum application date, and

24.3.2. they were under 18 on the asylum application date, and

24.3.3. they have been ordinarily resident in the UK since they were given leave to enter or remain.

25. Humanitarian protection status

25.1. Individuals with humanitarian protection status, where they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK.

25.1.1. The family members of individuals with humanitarian protection status, as defined below:

a) The spouse or civil partner of a person granted humanitarian protection is eligible if all of the following apply:

b) they were the spouse or civil partner of the person on the asylum application date, and

c) have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK

25.1.2. The child of a person with humanitarian protection status to enter or remain, or of the person's spouse or civil partner, is eligible if:

a) they were the person with humanitarian protection status's child or the child of the person's spouse or civil partner on the asylum application date, and

b) were under 18 on the asylum application date, and

c) have been ordinarily resident in the UK since they were given leave to enter or remain.

26. Discretionary leave to enter or remain.

26.1. Individuals with discretionary leave to enter or remain, where they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK.

26.1.1. The spouse or civil partner of a person granted discretionary leave to enter or remain is eligible if all of the following apply:

a) they were the spouse or civil partner of the person on the asylum or leave application date, and

b) they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK

26.1.2. The child of a person with discretionary leave to enter or remain, or of the person's spouse or civil partner, is eligible if:

- a) they were the person with discretionary leave's child or the child of the person's spouse or civil partner on the asylum or leave application date, and
- b) they were under 18 on the asylum or leave application date, and
- c) they have been ordinarily resident in the UK since they were given leave to enter or remain.

27. Extant leave to remain as a stateless person

- 27.1. Individuals who have extant leave to remain as a stateless person, where they have been ordinarily resident in the UK and Islands throughout the period since they were granted such leave.
- 27.2. Family members of individuals with extant leave to remain as a stateless person, as defined below:
 - 27.2.1. The spouse or civil partner of a person granted stateless leave is eligible if all of the following apply:
 - a) they were the spouse or civil partner of the person on the leave application date, and
 - b) they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK
 - 27.2.2. The child of a person with stateless leave, or of the person's spouse or civil partner, is eligible if:
 - a) they were the person with stateless leave's child or the child of the person's spouse or civil partner on the asylum or leave application date, and
 - b) they were under 18 on the leave application date, and
 - c) they have been ordinarily resident in the UK since they were given leave to enter or remain.

28. Leave outside the immigration rules

- 28.1. Individuals with leave outside the immigration rules, where they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK.
 - 28.1.1. The spouse or civil partner of a person granted leave outside the rules is eligible if all of the following apply:
 - a) they were the spouse or civil partner of the person on the asylum or leave application date, and
 - b) they have been ordinarily resident in the UK and Islands throughout the period since they were given leave to enter or remain in the UK
 - 28.1.2. The child of a person with leave outside the rules, or of the person's spouse or civil partner, is eligible if:
 - a) they were the person with leave outside the rules' child or the child of the person's spouse or civil partner on the asylum or leave application date, and

- b) they were under 18 on the asylum or leave application date, and
- c) they have been ordinarily resident in the UK since they were given leave to enter or remain

29. Ukraine schemes

29.1. Persons granted leave under one of the Ukraine schemes:

- 29.1.1. individuals with leave to enter or remain in the UK under the Ukraine Family Scheme
- 29.1.2. individuals with leave to enter or remain in the UK under the Ukraine Sponsorship Scheme (Homes for Ukraine)
- 29.1.3. individuals with leave to enter or remain in the UK under the Ukraine Extension Scheme
- 29.1.4. individuals with leave to remain in the UK under the Ukraine Permission Extension Scheme

30. Afghan schemes

30.1. Persons granted leave under one of the Afghan schemes:

- 30.1.1. individuals with leave to enter or remain in the UK under the Afghan Citizens Resettlement Scheme (ACRS)
- 30.1.2. individuals with leave to enter or remain in the UK under the Afghan Relocations and Assistance Policy (ARAP)
- 30.1.3. British Nationals evacuated from Afghanistan under Operation Pitting
- 30.1.4. British Nationals evacuated from Afghanistan by the UK government before 6 January 2022

31. Additional leave to remain

31.1. Individuals with indefinite leave to remain or enter granted:

- 31.1.1. as a victim of domestic abuse where they have been ordinarily resident in the UK since they were given leave to remain⁴.
- 31.1.2. as a bereaved partner, where they have been ordinarily resident in the UK since they were given leave to remain or enter⁵
- 31.1.3. under Section 67 of the Immigration Act 2016 leave⁶

⁴ As defined in the Immigration Rules Appendix "[Victim of Domestic Abuse](#)" on GOV.UK.

⁵ As defined in the Immigration Rules Appendix "[Bereaved Partner](#)" on GOV.UK

⁶ A child of a person who has received leave under section 67 of the Immigration Act 2016 will come under this bullet point where they have been granted "leave in line" by virtue of being a dependent child of such a person

31.1.4. under Calais leave to remain⁷

32. British Indian Ocean Territory

32.1. British citizens who were born in the British Indian Ocean Territory or, prior to 8 November 1965, in those islands designated as the British Indian Ocean Territory on that date or are direct descendants of a person who was born in the British Indian Ocean Territory or, prior to 8 November 1965, in those islands designated as the British Indian Ocean Territory on that date.

33. Children of Turkish workers (WMCA residents)

33.1. A child of a Turkish worker is eligible if both the following apply:

33.1.1. the Turkish worker is ordinarily resident in the UK on or before 31 December 2020 and has Turkish European Community Association Agreement (ECAA) rights or extended ECAA leave and

33.1.2. the child has been ordinarily resident in the UK, EEA and/or Turkey for at least 3 years preceding the first day of learning and is resident in the UK on or before 31 December 2020

34. Asylum seekers (WMCA residents)

34.1. Asylum seekers are eligible to receive funding if they:

34.1.1. have lived in the UK for 6 months or longer while their claim is being considered by the Home Office, and no decision on their claim has been made, or

34.1.2. are receiving local authority support under [section 23C](#) or [section 23CA of the Children Act 1989](#) or the [Care Act 2014](#)

34.2. An individual who has been refused asylum will be eligible if:

34.2.1. they have appealed against a decision made by the UK government against granting refugee status and no decision has been made within 6 months of lodging the appeal, or

34.2.2. they are granted support for themselves under [section 4 of the Immigration and Asylum Act 1999](#), or

34.2.3. They are receiving local authority support for themselves under [section 23C](#) or [section 23CA of the Children Act 1989](#)

⁷ A child of a person who has received Calais leave to remain will come under this bullet point where they have been granted “leave in line” by virtue of being a dependent child of such a person

35. No recourse to public funds conditions

- 35.1. The learner's immigration permission in the UK may have a 'no recourse to public funds' condition. Public funds does not include education or education funding. Therefore, this does not affect a learner's eligibility, which must be decided under the normal eligibility conditions.

36. Individuals who are not eligible for funding

- 36.1. You must not claim funding for individuals who do not meet the eligibility criteria set out in the residency eligibility section. Examples of individuals who do not meet the eligibility criteria include the following. Please note this list is not exhaustive:
- 36.1.1. those who are here without authority or lawful status
 - 36.1.2. those who are resident in the UK on a student visa unless they are eligible through meeting any other of the categories described above
 - 36.1.3. those who are in the UK on holiday, with or without a visa
 - 36.1.4. any family member of a person granted a student visa, who have been given immigration permission to stay in the UK and have not been ordinarily resident in the UK for the previous 3 years on the first day of learning.
 - 36.1.5. those whose biometric residence permit or residence permit imposes a study prohibition or restriction on the individual.

37. Residents in the armed forces

- 37.1. The WMCA will fund armed forces personnel, Ministry of Defence (MoD) personnel or civil and crown servants where they are residents within the WMCA area and meet the criteria in ['Section 2 Skills Programme Learner Eligibility'](#).
- 37.2. Members of other nations' armed forces stationed in WMCA, and their family members, aged 19 and over, set out in the [Section 2 Skills Programme Learner Eligibility](#) section are eligible for funding if the armed forces individual has been ordinarily resident in England for three years.
- 37.3. The WMCA will not fund family members that remain outside of the WMCA area.

Section 4. Skills Programmes Funding Rules

38. Principles of funding

- 38.1. WMCA-funded provision aims to engage adults and provide the skills and learning they need to progress into, or within, work; or equip them for an apprenticeship or other learning. It enables more flexible tailored programmes of learning to be made available, which may or may not require a qualification, to help eligible learners engage in learning, build confidence, and/or enhance their well-being.
- 38.2. We recognise that some employed residents might be supported by Universal Credit or on benefits and with low incomes. Therefore, the WMCA will support employed and unemployed residents, whether they are looking for a job or not looking for employment (economically inactive).
- 38.3. We will fund eligible learners where the WMCA have formally agreed the allocation and delivery plan with the provider.

39. Requirements of funding

- 39.1. You must hold and retain evidence to assure Us that You are using WMCA funding appropriately. Some evidence will occur naturally from Your normal business process, but if required by the WMCA, additional evidence should be retained. It is a condition of funding that all outcomes for WMCA residents, either directly delivered by You or Your supply chain delivery members, are recorded on the Individualised Learning Record (ILR).
- 39.2. The WMCA Skills funding must only be utilised to fund WMCA residents. Funding cannot be transferred between different budgets, including, where applicable, Your ESFA Adult Education Budget, Free Courses for Jobs (FCFJ) funding, the National Skills Fund (NSF) Technical Bootcamps, Multiply Apprenticeships, and advanced resident loans.
- 39.3. If the WMCA considers service delivery is not resulting in positive outcomes for adults in the WMCA area and/or the quality of provision is not to the required standard, the WMCA may (following a discussion with You) reduce your allocation or contract value. Equally, if You are finding it difficult to deliver your allocation or have unmet demand, then we want You to tell Us.
- 39.4. Additional information is contained in the [Skills Programmes Provider Payment & Performance Management Framework](#).
- 39.5. The [Skills Programmes Provider Payment & Performance Management Framework](#) should be read alongside your Agreement and the WMCA Funding Rules, as they all form part of Your contractual relationship with the WMCA.

- 33.1. For your direct delivery, and any subcontracted delivery, You (and where relevant, Your supply chain delivery member(s)) must have a valid UKPRN, direct centre approval and where appropriate, direct qualification approval from the respective awarding organisation for the regulated qualifications You are offering. Please note that organisations (with separate legal entities) within the same company group are classed as supply chain delivery members/sub-contractors.
- 33.2. Delivery of the qualification (including resident registration with the awarding organisation) for direct delivery and any delivery by your supply chain member(s) must be in line with the qualification specification and guidance set out by the relevant awarding organisation. Where You deliver regulated qualifications and/or their components, You must ensure they are eligible for WMCA Skills Programmes funding, [approved for funding](#) and available on [Find a learning aim](#).
- 33.3. We will fund qualifications that are linked to occupational regulation/licence to practise. You can find more information about these qualifications at the [qualifications website](#).
- 33.4. Before delivering a component, You must check with the awarding organisation that they provide a learner registration facility, and the learner can achieve it alone or as part of accumulating achievement towards a qualification.
- 39.6. You must provide accurate unique learner number (ULN) information to awarding organisations and ensure all information You use to register learners for qualifications is correct. You can find more information about the [Personal Learner Record Service](#).
- 39.7. If an individual meets the legal entitlement eligibility criteria, You must not charge them any course fees.
- 39.8. Eligible learners exercising their legal entitlement must be enrolled on approved qualifications for funding through the relevant entitlement. For the funding year 2023 to 2024, providers can find the approved qualifications in the [ESFA list of qualifications approved for funding](#).
- 39.9. The WMCA may make concessions in the Funding Rules responding to a specific economic event impacting residents e.g., a pandemic, climate event or significant restructuring of a large employer leading to residents at risk of redundancy. This will be agreed upon on a case-by-case basis.
- 39.10. Additional principles of funding for Free Courses for Jobs (FCFJ) funding can be found under [Upskilling and Reskilling section](#).
- 39.11. Additional principles of funding for National Skills Fund (NSF) Technical Bootcamps can be found under the [Upskilling and Reskilling section](#)
- 39.12. Additional principles for funding Multiply can be found under the [Good education up to level 2 sections](#)

40. What the WMCA will not fund

- 40.1. Provision that is not part of a provider's delivery plan or has not been given prior written approval by Us.
- 40.2. Qualifications, units or learning aims that are not listed on [finding a learning](#) aim or on the [DfE list of qualifications approved for funding](#).
- 40.3. WMCA does not fund provisions for residents in custody⁸. The [Ministry of Justice](#) funds prison education in England, except in the following cases:
 - 40.3.1. You can use your WMCA Skills Programmes to fund individuals released on temporary licence⁹.
- 40.4. Residents that do not have an eligible WMCA postcode.
 - 40.4.1. It is a provider's responsibility to ensure the relevant funding is secured from the relevant funding body in 2024/25 for their residents.
- 40.5. You must not claim funding for any provision you deliver to a resident whose learning is taking place outside of the WMCA.
- 40.6. You must not claim funding for any part of any resident's learning aim or programme that duplicates provision they have received from any other source.
- 40.7. You must not claim funding training through WMCA funded Skills programmes, where a learner is undertaking or planning to undertake an apprenticeship and where that training will:
 - 40.7.1. replicate vocational and other learning aims covered by the apprenticeship standard or framework, including English and maths.
 - 40.7.2. offer career-related training that conflicts with the apprenticeship aims.
 - 40.7.3. be taking place during the apprentice's working hours. Where an apprentice has more than one job, working hours refers to the hours of the job the apprenticeship is linked to.
- 40.8. You must not claim funding training through WMCA funded Skills programmes, if a learner is undertaking a degree and the Skills Bootcamp training offers career-related training that conflicts with their current university degree.
- 40.9. The WMCA will not fund a learner to repeat the same regulated qualification where they have previously achieved it unless it is for any GCSE where the learner has not achieved grade C, or grade 4, or higher.
- 40.10. The WMCA will not fund a learner to sit or resit a learning aim assessment or examination where no extra learning takes place.

⁸Skills Bootcamps are open to serving prisoners, who are due to be released from prison within 6 months following the completion of their Skills Bootcamp, and those on temporary release/licence.

⁹ Release on Temporary Licence (ROTL) means being able to leave prison for a short period of time. The Temporary Licence is the permission that allows leave, and the type of Licence indicates the reason the permission was granted.

41. Fees and charging

- 41.1. You must not charge learners a fee related to the direct costs of delivering a learning aim to learners We fully fund, including those with a legal entitlement to full funding for their learning. Direct costs include any essential activities or materials without which the learner could not complete and achieve their learning.
- 41.2. You may charge learners who are co-funded a fee related to the direct costs of delivering a learning aim.
- 41.3. You must not make compulsory charges, related to the cost of delivering a learning aim/programme to residents who do not complete their training or stopped attending.
- 41.4. If a fully funded learner needs a Disclosure and Barring Service (DBS) check to participate in learning, You cannot charge them for this. If the learning is associated with the learner's employment, their employer is responsible for carrying out and paying for this check. Please note, certain Into-employment programmes may have this cost included.
- 41.5. Any fees being charged to a learner, must be communicated before starting the programme. Evidence of this should be held in the evidence pack.
- 41.6. When charging a fee to co-funded learners, the sum of the WMCA contribution and the learner's fee must not exceed the fully funded weighted rate for the learning aim, and the learner should not have to pay more than 50% of the unweighted rate.

42. Qualifying days for funding

- 42.1. A learner must be in learning for a minimum number of days between their learning start date and learning planned end date before you can earn funding, including learning support.
- 42.2. The guidance below sets out the minimum days required for funding for Skills Programme¹⁰.

Planned length of learning aim	Minimum qualifying days
168 or more days	42 days
14 – 167 days	14 days
Fewer than 14 days	1 day

¹⁰ Does not apply to Lot 8 Digital bootcamps, Skills Bootcamps and/or multiply, which will be based on a different methodology. Please refer to their individual guidance.

- 42.3. WMCA will monitor the volume of day 1 withdrawals, where it is identified this is a high percentage, we will take a full review of the providers' withdrawals.
- 42.4. Where planned learning days are below the recommended GLH and additional needs of the resident, WMCA may seek removal of the funding.
- 42.5. This does not apply where the learner achieves the learning aim.

34. Qualifying GLH for funding

- 34.1. We have implementing rules around GLH to ensure delivery is in line with the number stated on the [Find A Learning Aim](#) site.
- 34.2. If we identify that the number of Planned GLH, based on the calculations from the Scheme of Work/Curriculum Plan/timesheet are below the number stated on the [Find A Learning Aim](#) site, we will take the following action;
 - 34.2.1. If the planned GLH are over 70%¹¹ of the stated hours, no action will be taken.
 - 34.2.2. If the planned GLH are between 50% and 70% of the stated hours, and a reduction of 30% of the learning aim value will be applied for the identified learning aims.
 - 34.2.3. If the planned GLH are below 50% of the stated hours, we will apply a 50% reduction in funding for the identified learning aims.
 - 34.2.4. Providers will be able to submit a [Business case](#), with justification, should they wish to have a variation to the recommended GLH.
 - 34.2.5. GLH will not be counted when they are part of a programme, for example, an into employment programme, however providers should ensure that the programme is planned effectively and meet the requirements set out for Into Employment programmes.

35. Recognition of prior learning

- 35.1. A resident could have prior learning that has been previously accredited by an awarding organisation or could be formally recognised and count towards a qualification. If this is the case, you must:
 - 35.1.1. reduce the funding amount claimed for the learning aim by the percentage of learning and assessment the resident does not need. Evidence of this assessment must be held in the evidence file.

¹¹ For Skills Bootcamps, if a resident has completed, we would expect to see at least 80% delivery of the recommended GLH.

- 35.1.2. follow the policies and procedures set by the awarding organisation for delivery and assessment of the qualification.
- 35.1.3. ensure You have a robust internal Recognition of Prior Learning (RPL) policy and appropriate resources to deliver RPL.
- 35.2. You must not use prior learning to reduce funding for:
 - 35.2.1. English and maths qualifications up to and including level 2.
 - 35.2.2. Essential digital skills qualifications up to and including level 1.
- 35.3. The WMCA does not set limits on the length of time of either prior learning or previously certificated learning. However, where the individual's learning and/or achievement occurs outside of a five-year period, You must assess whether the learning is still valid and relevant. Where provisions have been made against this, providers should ensure the justification is documented.
- 35.4. If a resident enrolls on an advanced subsidiary (AS) level qualification followed by an A level, You must reduce the funding claimed for the A level to take account of the prior study of the AS level and record this in the 'Funding adjustment for prior learning' field in the ILR. You can access ILR information in the guidance here; <https://guidance.submit-learner-data.service.gov.uk/23-24/ilr>.

36. Starting, participating, and achieving

- 36.1. You can only claim funding for learning activities. Therefore, You cannot claim funding for additional activities, such as enrolment, induction, prior assessment, diagnostic testing, or similar activities.
- 36.2. Where You deliver approved qualifications and/or their components You must ensure that learners are registered for the qualifications and/or components in line with the awarding policies and procedures. You must not pre-register students a significant period in advance of the learner starting the qualification.
 - 36.2.1. You can only claim funding for additional activities if this was agreed as part of your Delivery Plan.
- 36.3. You must have evidence that the learning took place. Evidence should evidence that the learning matches the number of guided learning hours expected.
- 36.4. Where the learning is certificated, You must follow the relevant awarding organisation's procedure for claiming the relevant certificate(s) and ensure the resident receives them. You must evidence this has happened in the resident file.
- 36.5. For formula funded nonregulated provision, an in-house certificate should be produced to show the learning undertaken has been achieved. This should be signed and dated by the awarding provider.
- 36.6. The WMCA will continually review and monitor whether the education and training You provide are delivering positive and agreed outcomes as detailed

and agreed by WMCA within your Delivery Plan. If providers are reaching or seem likely to reach the tolerances of their delivery plan, including legal entitlement, You will need to ensure the WMCA is notified as soon as possible.

37. Breaks in learning.

- 37.1. You can suspend learning while the learner takes an agreed and organised break from learning, where it is known that the intention of the learner is to return.
- 37.2. This allows the learner to continue later with the same eligibility that applied when they first started their learning. Typical examples include for economic reasons, long-term sickness, maternity leave, or religious trips.
- 37.3. You must record the date a learner starts a break in learning and the date they restart their learning in the ILR.
- 37.4. You must have evidence that the learner agrees to return and continue with the same learning aim; otherwise, You must report the learner as withdrawn. When the learner returns to learning, You must re-plan and extend the remaining delivery as required.
- 37.5. Where the resident does not return, you must report the aim/programme as withdrawn from the last date of attendance that You hold evidence for.
- 37.6. Breaks in learning must not be used to 'suspend' learning where contact is lost, or the attendance or academic performance of the resident is poor.
- 37.7. You must not use a break in learning for short-term absences, such as holidays or short-term illness.
- 37.8. The WMCA will not fund a resident during a break in learning.

38. Confirmation and signatures

- 38.1. Learners, and where applicable employers, must confirm all the information recorded in the ILR is correct when it is collected. You must have evidence of this, which can include electronic formats.
- 38.2. The WMCA accepts electronic evidence, including digital signatures, but You must have wider systems and processes in place to ensure that learners exist and are eligible for funding. You must keep effective and reliable evidence.
- 38.3. Both electronic and digital signatures are acceptable, We do not specify which should be used, only that a secure process to obtain and store signatures is followed:
 - 38.3.1. An electronic signature is defined as any electronic symbol or process that is associated with any record or document where there is an intention to sign the document by any party involved.

- 38.3.2. An electronic signature can be anything from a check box to a signature and/or
- 38.3.3. A digital signature is where a document with an electronic signature is secured by a process making it non-refutable.
- 38.3.4. It is a digital fingerprint which captures the act of signing by applying security to a document. Usually, documents which have a digital signature embedded are extremely secure and cannot be accessed or amended easily.
- 38.4. Where an electronic or digital signature is being held, from any party for any reason, You must ensure it is non-refutable. This includes the definitions of both wet and dry signatures. Systems and processes must be in place to assure us the original signature has not been altered. Where any document needs to be renewed, and a new signature taken, it must be clear from when the new document takes effect, and both must be held.
- 38.5. You are responsible for making the evidence You hold easily available when the WMCA needs it.

39. Self-declarations by residents

- 39.1. All self-declarations must confirm the resident's details and describe what the resident is confirming, which includes requirements set out in this document.
- 39.2. If a resident self-declares prior attainment, You must check this in the [personal learning record \(PLR\)](#) and query any contradictory information with the resident. The PLR will not necessarily override the resident's self-declaration. Evidence of this assessment must be held in the resident's file and be available for audit.
- 39.3. WMCA-funded residents must also complete a self-declaration form to confirm that they are employed if they are undertaking WMCA flexibilities for those in employment.

40. Leaving learning

- 40.1. You must report the learning actual end date in the ILR for a learner who leaves learning as the last day that You can evidence, they took part in a learning activity.
- 40.2. As a condition of funding, all destinations and/or progression details of WMCA learners are a mandatory requirement, this includes Tailored Learning (former Community learning).
- 40.3. Providers must limit 'unknown' destination reporting.
- 40.4. Destination and progression must be detailed in the defined fields within the ILR.
- 40.5. All resident postcodes must be accurately recorded at the start of an aim.
- 40.6. It is mandatory to update destination and progression data in the ILR monthly.

41. Data Submission - Individualised learner record (ILR) & Course Data

- 41.1. You must submit ILR data or other agreed formats of learner data from the beginning of the academic year (R01) and then monthly. We expect providers to notify WMCA should You be unable to submit for any reason. The WMCA reserves the right not to make payments if your learner data is not submitted.
- 41.2. You must accurately complete all ILR fields as required in the [2023 to 2024 ILR specification](#) and [Skills Programme Coding Guidance](#), even if they are not required for funding purposes.
- 41.3. You must provide accurate unique learner number (ULN) information to awarding organisations and ensure all information You use to register learners for qualifications is correct. You can find more information in the [Learner Records Service](#) guidance.
- 41.4. The ILR must accurately reflect the learning and support (where applicable) You have identified, planned, and delivered to eligible individuals. You must not report inaccurate information that would result in an overstatement of the funding claimed.
- 41.5. Where your data does not support the funding claimed, we will take action to correct this, and we could recover funds You overstated.
- 41.6. In addition to the information in this section, the [Performance and management](#) rules have been provided, which sets out how You should submit data, how the WMCA will undertake its financial due diligence, make payments, performance management, audit and gain assurance from its providers.
- 41.7. WMCA has provided extra guidance regarding ILR coding; please refer to the [Skills Programme Coding guidance](#) for more information.
- 41.8. You should also refer to the [ESFA ILR specification](#) and provider manual, and any other relevant documents referred to in those documents.

42. Learning in the workplace

- 42.1. The WMCA will fund learning in the workplace to support residents achieve an in-work progression such as increased pay, responsibility, or promotion. This provision should have a flexible delivery to allow all employed residents to participate according to their needs.
- 42.2. The WMCA will also fund learning in the workplace for work experience linked to Into-employment programmes as part of your delivery plan.

43. Job outcome definitions

- 43.1. Job outcome payments, linked to standard programmes.
 - 43.1.1. For fully funded learners who are unemployed, We will pay 50% of the achievement payment if they start a job before achieving the learning aim. If the learner then achieves the learning aim, We will pay the remaining achievement payment.
- 43.2. Job outcome payments linked to Into-employment programmes:
 - 43.2.1. For funding the learner must have met the conditions of funding listed in the specification for that course, this will include a day 1 payment and 13-week sustained employment payment. The specification for payment and costing is found in each programme specification.
- 43.3. The following conditions apply:
 - 43.3.1. the resident must provide You with evidence through a [declaration](#), that they have a job for at least 7.5 hours or more a week for four consecutive weeks. [Universal Credit work allowances](#) may still apply for those residents eligible who become employed and will reduce in time, based on the earnings taper rate.
 - 43.3.2. Where the learner was claiming benefits relating to unemployment, they must also declare that they have stopped claiming these. Please note this does not relate to Universal Credits (UC)

44. Unemployed & Economically Inactive definition

- 44.1. The WMCA defines a resident as 'unemployed' if they are not currently employed and are able to start work or are available for work.
- 44.2. Providers should ensure that for those unemployed, the learning is directly relevant to their employment prospects and labour market needs and is recorded in the ILP.
- 44.3. We define a learner as unemployed if one or more of the following apply. They:
 - 44.3.1. receive Jobseeker's Allowance (JSA), including those receiving National Insurance credits only.
 - 44.3.2. receive Employment and Support Allowance (ESA)
 - 44.3.3. receive Universal Credit (UC), and their take-home pay as recorded on their UC statement (disregarding UC payments and other benefits) is less than £892 a month (learner is sole adult in their benefit claim) or £1437 a month (learner has a joint benefit claim with their partner)
 - 44.3.4. are released on temporary license, studying outside a prison environment, and not funded by the Ministry of Justice
 - 44.3.5. The WMCA will also define economically inactive residents who are not currently employed and/or claiming an active benefit as unemployed.
- 44.4. To support assurance, activity providers should secure self-declarations from residents that can be evidenced to identify employment status set out in [Confirmation and signatures](#).

45. Employed definition.

- 45.1. For 2024/25, the WMCA will continue to use the criterion to confirm whether a resident is employed. The WMCA defines residents as employed if they are in receipt of waged income as a permanent, temporary, or self-employed worker.
- 45.2. Contracts of employment that define a resident as employed will include part-time, zero-hour and agency contracts.

46. Residents in receipt of low wage.

- 46.1. You may fully fund residents who are 'Employed' if they:
 - 46.1.1. earn less than £32,000 per annum. You may also fully fund learners who meet the low wage criteria for qualifications included in the [level 3 FCFJ offer](#).
- 46.2. You must have seen evidence of the resident's gross annual wages in these circumstances. This could be a wage slip within three months of the resident's learning start date, a bank statement showing the paid amount or a current employment contract that states gross monthly/annual wages.
- 46.3. Please note this is not an exhaustive list but must support Your decision to award full funding to an individual who would normally be eligible for co-funding.

47. Supply Chain/Subcontract

- 47.1. The funding and commitments are set out in the [Skills programme Supply Chain Funding Rules 2023/24](#).
- 47.2. Please note that organisations (with separate legal entities) within the same company group are classed as supply chain delivery members/sub-contractors.
- 47.3. The WMCA requires all its providers to have a clear rationale as to why they use a supply chain in the delivery of the Skills Programmes.
- 47.4. We require greater transparency and closer collaboration in relation to the supply chain delivery and those services provided by third parties.
- 47.5. We will require providers to set out rationale at course level as part of the supply chain declaration– this includes recruitment, delivery of teaching, learning or assessment and job finder services.
- 47.6. The detailed supply chain arrangements that underpin Your Agreement will need to be agreed upon as part of Your delivery plan. If You do not have an Agreement in place at the beginning of the funding year, You cannot enter into a supply relationship without the express written agreement of the WMCA.

- 47.7. If during the funding year, You wish to make in-year changes to Your agreed supply chain delivery member or arrangement, You must provide a business case with a clear rationale in advance of making any changes to allow for the approval process to be completed. Please note that WMCA reserves the right not to accept any proposed supply chain delivery partner or sub-contractor and will not be liable to the provider as a result of taking such a decision.
- 47.8. This must be approved and agreed with WMCA prior to any additional supply chain delivery procurement activity taking place.
- 47.9. You must not use Your supply chain to meet short-term funding objectives.
- 47.10. The WMCA will be reviewing, using the ILR and its performance management reviews, the contributions of supply chain to Your Delivery Plan.
- 47.11. The WMCA will implement additional controls related to sub-contracting and associated third-party services provided in the delivery of Skills Programmes. More details can be found in [WMCA's Skills Programmes Supply Chain funding rules](#).

Section 7. – Skills Programmes Evidence

48. Evidence

- 48.1. You need to hold evidence to assure WMCA that You have used funding appropriately and delivered education and training in line with Our Agreement, these Funding Rules and the funding and performance-management rules.
- 48.2. Some evidence will come from specific business processes, and some as part of your day-to-day working. Evidence can be naturally occurring.
- 48.3. You must make sure enrolments for WMCA-funded Adult Education Budget (AEB), Free courses for jobs (FCFJ), National Skills Fund (Bootcamps) and Multiply, support Your decision to claim funding and support the individual's case for consideration as a resident in the West Midlands Combined Authority or any exceptions set out in the [Learner Eligibility](#) section.
- 48.4. In line with UK [General Data Protection Regulations](#) (UK GDPR), You must record in the evidence pack what appropriate documentation You have seen, rather than take photocopies to prove eligibility.
- 48.5. The resident file will continue to be submitted to the WMCA through the ESFA Hub. The resident file must contain evidence to support the funding You wish to claim from the WMCA.
- 48.6. The evidence pack must contain evidence to support the funding claimed and must be available to Us on request if we need it.
- 48.7. You must accurately complete all [ILR fields](#) as required in the 2024 to 2024 ILR Specification, published by the ESFA, even if they are not required for funding purposes.
- 48.8. Evidence in the evidence pack must assure the WMCA that the learner exists.
- 48.9. The ILR must accurately reflect the learning and support (where applicable) You have identified, planned, and delivered to eligible WMCA residents. You

must not report inaccurate information that would result in an inflated claim for funding.

- 48.10. Where Your data does not support the funding, You have claimed, WMCA will act to get this corrected and could recover funds You have claimed.
- 48.11. All resident postcodes must be accurately recorded at the start of an aim.
- 48.12. All self-declarations must confirm the resident's details and describe what the resident is confirming for requirements set out in this document.
- 48.13. Providers can accept a reply to an email, text, or team message from a resident as proof of self-declaration for a job/13-week sustainment. The declaration would need to confirm all the detail required to confirm the job/13-week sustainment has been achieved and would ideally be from the same contact details as on the enrolment form.
- 48.14. Additionally, WMCA will accept an email from an employer setting out the same details or DWP to show that the resident is no longer claiming benefits.
- 48.15. If a resident self-declares prior attainment, You must check this in the personal learning record (PLR) and query any contradictory information with the resident. The PLR will not necessarily override the resident's self-declaration.
- 48.16. The resident must confirm information they provide is correct when it is collected.
- 48.17. If the time spent in learning is short, the level of evidence in the resident file would reflect this.
- 48.18. Where You hold information centrally, You only need to refer to the source.

49. Evidence pack

- 49.1. You must hold evidence which confirms the following:
 - 49.1.1. that the learner exists,
 - 49.1.2. that the learner is eligible for funding and at the rate of funding being claimed,
 - 49.1.3. that the education and training being delivered is eligible for funding,
 - 49.1.4. that the learning activity is taking place or has taken place,
 - 49.1.5. that the achievement of learning aims is certified, if applicable (that is, a certificate has been issued by an awarding organisation or for formular- funded, non-regulated programmes, evidence of a in house certificate),
 - 49.1.6. that progressions into employment or further training have been achieved in line with programme specification.
 - 49.1.7. that resident has been informed that funding has been funded by WMCA.
 - 49.1.8. that resident has been made aware and provided the privacy notice relevant to their provision.
 - 49.1.9. That a resident has been informed of the relevant Whistleblowing and complains Policies.
 - 49.1.10. All information reported to the ESFA for WMCA residents in the ILR and the WMCA Earnings Adjustment Statement (EAS), and if it applies, the supporting evidence for the data You report for each resident.
 - 49.1.11. Your assessment and evidence of eligibility for funding and a record of what evidence the resident has provided including:

- a) All initial basic skills and diagnostic assessments undertaken to determine a learner's requirements.
 - b) Initial CEIAG, including how the programme/aim will support the resident.
 - c) Information on prior learning that affects the learning or WMCA funding of any of the learning aims or programmes.
 - d) For 'personalised learning programmes', for example, learning not regulated by a qualification, full details of all the aspects of the learning to be carried out, including supporting evidence of the number of planned hours reported in the ILR.
 - e) A description of how You will deliver the learning and skills and how the resident will achieve their outcomes related to further progression e.g., employment, apprenticeship and/or further learning.
 - f) The supporting evidence about why You have claimed funding and the level of funding for a resident, including details of any resident or employer contribution.
 - g) Support needs identified, including how You will meet these needs and the evidence of that.
 - h) Details of any learner or employer contribution
- 49.1.12. You must have evidence to show the learning is taking or has taken place. This will depend on the methods You use and could for example include registers, reviews, and online software. Attendance at a location, such as a classroom or training centre, is not sufficient on its own to evidence learning has taken place. Attendance/participation records are available, matching planned [Guided Learning Hours](#) and start and end dates.
- 49.1.13. You must have evidence of employment status, this could include a resident's self-declaration as to what state benefits, they claim.
- 49.1.14. You must hold evidence of outcomes; this could include a resident's self-declaration on their status relating to gaining a job.
- 49.2. You must hold evidence of all records and evidence of achievement of learning aims or learning programme. This must be available within three months of You reporting it in the ESFA ILR for WMCA residents. Achievement dates should be clear on certification.
- 49.3. If a learner withdraws from learning without achieving their learning aim, You must only claim funding up to the last date where You have evidence that the learner was still in learning.
- 49.4. You should only make claims for delivery through the ILR and supplementary data where the required contractual evidence is in place prior to submission.
- 49.5. You must hold evidence for all claims under learner, learning support fund and wrap around support.
- 49.6. You must hold evidence for assessment and claims for residential support where this has been approved as part of your contract.
- 49.7. You must keep evidence that the resident is eligible for funding. Where the resident is unemployed, this must include a record of what You have agreed with them, including the relevance of the learning to their employment prospects and the labour market needs.

- 49.8. Where Your supply chain delivers any provision to the resident, it must clearly identify who it is. This must match the information reported to Us in the ESFA ILR for WMCA residents.
- 49.9. You must ensure the paperwork includes [WMCA branding](#).

50. Control systems

The WMCA regulations require that the funding You receive is 'regular and legal' which means that You and We must maintain an audit trail for the funding You receive and the participant activity. You must maintain the evidence for each deliverable and make that available for audit. Failure to maintain the audit trail will lead to funding being recovered. Your control systems will be an essential element in the management of your audit trail.

- 50.1. You must put in place adequate control systems to ensure that the ILR and Supplementary Data submissions You make to Us are accurate, complete and have a complete audit trail to justify them. Your control systems must allow You to recover evidence for audit quickly and accurately. Your control systems must extend to Your supply chain.
- 50.2. You must regularly test your control systems and Your supply chain's control systems and the learner evidence that they maintain and provide evidence to Us that Your systems operate correctly.

51. Whistleblowing and Complaints Guidance

- 51.1. Providers, and where appropriate sub-contractors and/or supply chain members, must ensure that all applicants, learners, and staff are aware of the DFE's [Whistleblowing and Complaints](#) policies and processes for Skills Bootcamp and Multiply delivery.
- 51.2. Whistleblowing for Skills Bootcamps and Multiply should be made through the 'whistleblowing' [webform](#).
- 51.3. Whistleblowing entries must be clearly marked as the programme type (e.g., Skills Bootcamp/Multiply) and will be escalated to the relevant policy team.
- 51.4. Provider should ensure this information is passed onto residents and record that this has been completed.
- 51.5. For all Skills programmes, Whistleblowing and complaints should additionally be submitted via the [WMCA portal](#).

52. Quality Assurance

- 52.1. As part of our assurance work, the WMCA will be monitoring the data you submit to the ESFA from the ILR and the EAS.
- 52.2. In order to gain assurance, the WMCA will undertake regular reviews of all providers in line with the [Quality and Standard Framework](#).
- 52.3. The reviews will include, but not be limited to:
 - 52.3.1. Systems and processes
 - 52.3.2. ILR Data
 - 52.3.3. EAS submission
 - 52.3.4. Sample check of learner files
 - 52.3.5. Sub-contracting arrangements
 - 52.3.6. Other contractual requirements
- 52.4. To provide further assurance, the WMCA may use the services of external suppliers to undertake field-based activity as part of our annual assurance programme of work, comprising funding compliance audits and targeted thematic funding assurance reviews.

Section 9. –Support Funds

53. Support funding

WMCA's over-arching aim is to support as many eligible adult learners as possible to access learning. Some learners will need additional support to start or stay in learning.

Where You identify that a learner has a learning difficulty or disability, or a financial barrier, Your Skills programme allocation (where approved) enables You to claim learning support and/or learner support funding to meet the additional needs of learners.

Access to learning support funds can be granted, but this must form part of Your delivery plan allocation and you must demonstrate that the investment in learning/learner support leads to good outcomes for learners

54. Support funding (Currently covering AEB and FCFJ funding only)

- 54.1. Learning support is available to meet the cost of putting in place a reasonable adjustment, as set out in the [Equality Act 2010](#), for residents who have an identified learning difficulty or disability, to achieve their learning goal.
- 54.2. Learning support must not be used to deal with everyday difficulties that are not directly associated with a resident's learning on their programme.
- 54.3. You must:
 - 54.3.1. carry out a thorough assessment to identify the support the resident needs.

- 54.3.2. agree and record the outcome of Your assessment in the resident file.
- 54.3.3. record all outcomes on the resident file and keep all evidence of the assessment of the needs, planned and actual delivery.
- 54.4. All learning support claims must be reported in the ILR. To claim any costs that exceed the fixed monthly rate You must also use the earnings adjustment statement (EAS).
- 54.5. You must use the WMCA EAS if Your costs exceed this monthly rate, and You must keep evidence of these costs. You must only record the excess amount on the EAS, not the whole learning support cost. You can find details of how to make a claim in the [Skills Programme Coding guidance](#).
- 54.6. You can claim learning support if learning continues past the planned end date and the resident needs continued support.

55. Exceptional learning support claims above £19,000

If a learner needs significant levels of support to start or continue learning and has support costs of more than £19,000 in a funding year, You can claim exceptional learning support (ELS).

Learners aged 19 to 24 who require significant levels of support should have an Education and Health Care Plan (EHCP) provided by their local authority and, therefore, would access funding from their local authority.

- 55.1. Claims should be submitted via a business case in a timely manner and will need formal approval before submitting a claim via Earnings Adjustment Statement (EAS)
- 55.2. You must submit ELS claims at the beginning of the resident's programme, or when You identify the resident requires support costs of more than £19,000 in a funding year, by completing and sending the [ELS claims document](#).
- 55.3. To claim exceptional learning support for a resident aged 19 to 24 You must confirm why the individual does not have an EHC plan. This should be a letter or email from the resident's local authority stating the reason(s) why the individual does not need an EHC plan.
- 55.4. When You claim exceptional learning support You must explain why you have claimed the amount You have, which would be linked to the learner's assessment and planned learning support claim. You must only claim amounts for Your costs of providing the support to the learner and not include any indirect costs or overheads.
- 55.5. ELS will be funded from within your Skills Programme allocation.

56. Learner Support included in Skills Programmes allocation (under review)

- 56.1. The Learner Support Fund is currently under review. All changes to its purpose, process to claim and any other associated elements will be communicated to providers in an update to these funding rules.
- 56.2. Learner support is available to provide financial support for residents with a specific financial hardship preventing them from taking part / continuing in learning. Before You award support to a resident, identify their needs within the following categories:
- 56.2.1. Hardship funding – general financial support for vulnerable and financially disadvantaged residents to support participation learning.
 - 56.2.2. 20+ childcare funding – for residents aged 20 or older on the first day of learning who are at risk of not starting or continuing learning because of childcare costs.
 - 56.2.3. Residential Access funding – to support WMCA-funded Skills Programmes residents where they need to live away from home.
- 56.3. You must not claim more than 5% of your total Learner Support final claim as administration expenditure. You must document your process for managing Your administration costs over the current funding year and record, report and retain evidence on spending for each of the categories.
- 56.4. If You do not have a Learner Support allocation, You must follow these Funding Rules and claim learner support using the earnings adjustment statement (EAS). Approval for claims must be submitted via a business case in a timely manner and will need formal approval before submitting a claim via EAS. Additional overview must be submitted to WMCA monthly, please refer to the [Skills Programme Coding guidance](#) for more support.
- 56.5. You must:
- 56.5.1. have criteria for how You will administer and distribute Your funds; these must reflect the principles of equality and diversity and be available to residents and to Us on request.
 - 56.5.2. assess and record the resident's needs, demonstrating the need for support.
 - 56.5.3. report the appropriate Resident Support Reason codes in the 'Resident Funding and Monitoring' fields in the ILR. You do not need to report this for non-formula Tailored Learning (former Community learning).
 - 56.5.4. Report Your expenditure via the mid-year funding forecast, End of year forecast and final funding claims.
 - 56.5.5. a
- 56.6. You must not use resident support funds for any of the following:
- 56.6.1. essential equipment or facilities if the learner is eligible for full funding except for the items covered in the first clause of the [hardship section](#) and the flexibilities in [ICT devices and connectivity section](#)
 - 56.6.2. A resident in custody or released on temporary licence.
 - 56.6.3. A resident carrying out a higher education course or learning aims fully funded from other sources.
 - 56.6.4. To pay weekly attendance allowances or achievement and attendance bonuses

57. Hardship

- 57.1. You can use hardship funds for any of the following:
 - 57.1.1. Course-related costs, including course trips, books, and equipment (where costs are not included in the funding rate)
 - 57.1.2. Support with domestic emergencies and emergency accommodation provided by others, or by providing items or services or cash direct to the learner, this can be in the form of a grant or repayable loan provided by You.
 - 57.1.3. Transport costs (but not a block contribution to post-16 transport partnerships or routinely funded transport costs covered in the Local Authority's legal duty for residents of sixth-form age)
 - 57.1.4. Examination fees
 - 57.1.5. Accreditation fees, professional membership fees and any fees or charges due to external bodies
 - 57.1.6. Your exam registration fees.
 - 57.1.7. Support provided by others, or by providing items, services, or cash direct to the resident. This can be a grant or a repayable loan.
- 57.2. In exceptional circumstances, You can use hardship funds with course fees for residents who need financial support to start or stay in learning. WMCA permission will be needed prior to the submission of any claim.
- 57.3. If an asylum seeker is eligible for provision, You may provide resident support in the form of course-related books, equipment, or a travel pass.

58. 20+ childcare

- 58.1. You can only use childcare funding to pay for childcare with a childminder, provider, or childminder agency, registered with Ofsted.
- 58.2. You must not use childcare funding to:
 - 58.2.1. fund informal childcare, such as that provided by a relative
 - 58.2.2. set up childcare places or to make a financial contribution to the costs of a crèche.
 - 58.2.3. fund childcare for residents aged under 20 on the first day of learning; instead You must direct them to the ESFA's ['Care to Learn programme'](#)
- 58.3. You must not use childcare for those aged 20 years or older to top up childcare payments for those receiving 'Care to Learn' payments.

59. Residential Access funding

- 59.1. You can use residential access funding to support WMCA funded Skills Programmes learners who meet eligibility criteria, where they need to live away from home, for example, to access specialist provision which involves a residential element, or to support learners who cannot access provision locally.
- 59.2. You must:
 - 59.2.1. set out the criteria and procedures for considering and agreeing applications for support from Your residential access funds.

- 59.2.2. only pay for travel costs for learners who are awarded residential access funding in exceptional circumstances.
- 59.2.3. only claim residential access funding for the period the learner is resident, this could be in accommodation You own or manage or other accommodation which You have agreed to fund in line with your criteria.
- 59.2.4. ensure costs claimed represent value for money for the local area.
- 59.2.5. Where You have Your own residential facilities, You must publish your rates.

60. ICT devices and connectivity

- 60.1. You can support disadvantaged learners who are undertaking classroom or blended learning to continue to participate via online learning where the learner:
 - 60.1.1. does not have internet access at home, and/or
 - 60.1.2. does not have a suitable device, i.e., laptop or tablet, to complete the necessary online course work.
- 60.2. You must secure value for money when purchasing IT devices and/or internet access including:
 - 60.2.1. deploying any unused devices before You purchase new ones.
 - 60.2.2. exploring options to access low-cost second-hand or recycled devices.
 - 60.2.3. avoiding entering long-term contract arrangements
 - 60.2.4. holding a record of actual costs for any IT devices and/or internet access bought for this purpose and making this available to Us, if asked
- 60.3. IT devices You purchase must only be loaned out to learners and returned at the end of their learning aim to allow them to be re-used by other learners. Learners must sign a declaration, confirming:
 - 60.3.1. they will return the device when their online learning aim(s) complete, or if they leave before completing their learning.
 - 60.3.2. they will return the device in the same condition in which they received it.
 - 60.3.3. You must maintain an up-to-date record of the loan and return of devices to learners.
 - 60.3.4. You must record the following evidence in the learner's evidence pack:
 - a) the outcome of the assessment undertaken to identify the learner's individual needs.

Section 10. –Programme elements

- 61. The Employment and Skills Strategy aims to enhance the success we have achieved so far by outlining a plan for a unified employment and skills system for the West Midlands region. This system will help us promote economic growth, improve outcomes for residents and businesses, and create more prosperous and healthy communities. Our focus for the next three years will be on:
 - 61.1. building strong and inclusive communities.
 - 61.2. providing a good education up to level 2.
 - 61.3. moving residents into employment and supporting career progression.
 - 61.4. meeting future skills needs through upskilling and reskilling.

62. We will also invest in the development of a broader effective regional eco-system for employment and skills, building the leadership capacity and capability to transform outcomes for residents, businesses and the region.
63. An overview of funding for each area is outlined below.

64. Developing Stronger Communities

65. Introduction

- 65.1. Our vision is to build a more prosperous and better-connected West Midlands, which is fairer, greener, and healthier. Employment and skills are critical to achieving this ambition, but the impacts of adult learning extend far beyond this into the very fabric of our wider lives, our families and our communities. Likewise, strong communities, comprised of healthy, resilient, connected and proactive citizens are the basis for strong economic development and inclusive growth.
- 65.2. Adult learning, delivered in or by communities, plays a critical role in connecting individuals and families, improving their resilience, supporting mental and physical health, engaging those furthest away from civic and community life, as well as providing access to good work. Poor mental health, in particular, can have a devastating impact on the working age population, with almost 14.3m working days lost annually due to mental ill health¹².
- 65.3. Working closely and collaboratively with our Local Authority and voluntary and community sector partners, we are committed to further developing a strong place-based offer of learning for communities in all parts of the region that:
 - 65.3.1. **Supports good health and well-being:** particularly the mental health of those experiencing isolation, for younger adults affected by the pandemic, and for adults outside of the labour market due to poor health or a disability.
 - 65.3.2. **Builds confidence:** increasing residents' resilience to face life's challenges and changes, encouraging them to think critically and creatively, and effecting behaviour change that enables them to engage in further learning, civic life and/or the labour market.
 - 65.3.3. **Improves inclusion and integration:** developing stronger communities with more self-sufficient, connected, and pro-active citizens, leading to increased volunteering, civic engagement and social integration.
 - 65.3.4. **Develops key life skills:** equipping parents and carers to support and encourage their children's learning (for example through family learning), enabling social mobility, improving progression towards independent living, improving understanding of sustainability, and improving digital, financial and communication skills.

¹² <https://www.gov.uk/government/publications/health-matters-health-and-work/health-matters-health-and-work>

65.3.5. **Prepares learners for employment or further learning:** moving more people on to further learning opportunities in more formal settings.

65.4. Set out below are our training offers, which will support residents to support with Developing stronger communities.

65.4.1. Tailored Learning (former Community learning).

65.4.2. Prince trust

66. Tailored Learning (former Community learning)

67. Overview

67.1. Tailored Learning is a long-term investment on individuals and on our communities. It is the first step in a path, leading to improved health, acquisition of skills to access further learning or employment and thereby delivering social and economic outcomes.

67.2. Tailored Learning brings together citizens from different backgrounds and socioeconomic levels to increase their social and cultural capital, as they develop key life skills, improve their health and well-being, and become more involved in community life. This promotes social renewal by bringing communities together.

67.3. This section only applies to providers with a non-formula Tailored Learning allocation included in their Agreement.

67.4. The purpose of Tailored Learning is to develop the skills, confidence, motivation, and resilience of adults of different ages and backgrounds in order to:

67.4.1. progress towards formal learning or employment and/or

67.4.2. improve their health and well-being, including mental health and/or

67.4.3. develop stronger communities.

68. Offer

68.1. The Tailored Learning objectives, ask You to widen participation and transform people's destinies by supporting progression relevant to personal circumstances. We would expect You to encourage and support all learners to progress onto new or more stretching provision to help them into more formal learning or employment. We would not expect to see multiple enrolments on similar level courses, or a repeat of similar learning aims where this does not benefit the learner's development.

68.2. Tailored Learning courses are delivered and reported on the ILR under the following 7 delivery strands which link to the Tailored Learning purposes.

68.2.1. Engaging and/or building confidence

68.2.2. Preparation for further learning

68.2.3. Preparation for employment

68.2.4. Improving essential skills (English, including English for Speakers of Other Languages, maths, and digital provision)

68.2.5. Equipping parents/carers to support children's learning.

68.2.6. Health and well-being

68.2.7. Developing stronger communities

- 68.3. Please note, non-formula Tailored Learning funding follows funding model 11.
- 68.4. You must deliver non-formula funded Tailored Learning provision in line with the existing Tailored Learning objectives set out in paragraph 71.
- 68.5. Non-formula Tailored Learning funding will be reconciled against the Tailored Learning allocation line at the end of the funding year. You must repay funding that has not been used for Tailored Learning or where its use cannot be evidenced.
- 68.6. You must attribute costs for eligible learners, up to the value of Your non-formula Tailored Learning allocation. This must include the use of Your non-formula Tailored Learning funding to cover learning and learner support costs. If You do, You must:
 - 68.6.1. claim for learning and learner costs through the final funding claim and follow the policy in line with the support funding section.
 - 68.6.2. record these costs in the learner's evidence pack and maintain evidence that support the costs for audit purposes.
- 68.7. We will monitor Tailored Learning provision through the ILR and claim submissions and may require You to provide information on Your delivery where it does not represent value for money.
- 68.8. If We fund You through a grant or financial memorandum, You have the flexibility to use all, or some, of your non-formula Tailored Learning funding in line with the AEB formula-funded methodology (funding model 38), to meet local demand. This flexibility works one way, You cannot use Your WMCA formula funded AEB to fund additional Tailored Learning and We will not fund above value in Your Agreement.
- 68.9. You can use this amount of non-formula Tailored Learning funding to deliver non-regulated provision that may be similar to Tailored Learning, and/or regulated qualifications to meet local demand. If You do deliver regulated and non-regulated qualifications, You must:
 - 68.9.1. follow ESFA funded AEB formula-funded methodology and submit ILR data under funding model 38 for the delivery and support.
 - 68.9.2. enrol learners following WMCA funded AEB eligibility requirements. You must not use Your non-formula Tailored Learning local fee remission policy.
 - 68.9.3. if We fund your organisation through a Contract for Services, You do not have this flexibility, and We will reclaim unspent non-formula Tailored Learning funding at year-end.
- 68.10. You can support learners aged under 19 if they meet both of the following, they are:
 - 68.10.1. a parent, carer or guardian attending provision delivered through family learning.
 - 68.10.2. funded through non-formula Tailored Learning using funding model 11 in the funding model field (refer to ILR guidance for more information)
 - 68.10.3. You must not use non-formula Tailored Learning funding for learning that is eligible for funding through an advanced learner loan.

69. Eligibility principles

- 69.1. The eligibility principles the WMCA applies to Tailored Learning are as follows;
 - 69.1.1. It must not be provision linked to UK visa requirements.

- 69.1.2. It must not be provision linked to statutory employer requirements (including a licence to practise) unless there is an agreed concession in place.
- 69.1.3. It must not be vendor-specific provision, linked to a particular employer or commercial system unless this has been agreed as a flexibility.
- 69.1.4. It must not be learning, for example, 'induction to college', that should be part of a resident's experience.
- 69.1.5. It must not be a non-regulated version of a regulated qualification.
- 69.1.6. It must not be above notional level 2 (that is, at notional levels 3 or 4). At notional level 2, it must focus on technical provision.
- 69.2. Where You are delivering Tailored learning, You must ensure You have appropriate and robust quality assurance processes in place. For instance, 'The Recognising and Recording Progress and Achievement (RARPA) Cycle'. Further information on [RARPA](#) is available from the Learning and Work Institute.
- 69.3. It is the intention of the WMCA to use the RARPA model to monitor, review and measure the quality and outcomes from non-regulated provision in 2023/24. Tailored learning should have clear achievement aims for the residents and identified progression outcomes prior to commencement of learning.
- 69.4. Providers must have a fair and transparent fees policy in place. Providers are asked to collect fee income from people who can afford to pay and use where possible to extend provision to those who cannot. Your fees policy must be available on your website and, where appropriate, in the venues where you deliver tailored learning.

70. Tailored Learning and the role of language acquisition

- 70.1. Tailored Learning plays a significant role in engaging those residents isolated in communities who need to develop their English communication skills to support both their own personal health and well-being and secure work through English Language acquisition.
- 70.2. We expect Tailored Learning providers to have offers of regulated provision (across the levels) and non-regulated English Language acquisition to support residents' progression to further learning and work. In addition, We expect Tailored Learning providers to establish online learning related to English Language acquisition, which could be through collaborative working.

71. Tailored Learning objectives

- 71.1. focus public funding on people who are disadvantaged and least likely to participate, including in rural areas and people on low incomes with low skills.
- 71.2. collect fee income from people who can afford to pay and use where possible to extend provision to those who cannot.
- 71.3. widen participation and transform people's destinies by supporting progression relevant to personal circumstances, including:
- 71.4. improved confidence and willingness to engage in learning.

- 71.5. acquisition of skills preparing people for training, employment, or self-employment
- 71.6. improved digital, financial literacy and/or communication skills.
- 71.7. parents/carers better equipped to support and encourage their children's learning.
- 71.8. improved/maintained health and/or social well-being.
- 71.9. develop stronger communities, with more self-sufficient, connected, and pro-active citizens, leading to:
 - 71.9.1. increased volunteering, civic engagement, and social integration
 - 71.9.2. reduced costs on welfare, health, and anti-social behaviour.
 - 71.9.3. increased online learning and self-organised learning.
 - 71.9.4. the lives of our most troubled families being turned around.
- 71.10. commission, deliver and support learning in ways that contribute directly to these objectives, including:
 - 71.10.1. bringing together people from backgrounds, cultures, and income groups, including people who can/cannot afford to pay.
 - 71.10.2. using effective local partnerships to bring together key providers and relevant local agencies and services.
 - 71.10.3. devolving planning and accountability to neighbourhood/parish level, with local people involved in decisions about the learning offer.
 - 71.10.4. involving volunteers and voluntary and community sector groups, shifting long term, 'blocked' classes into learning clubs, growing self-organised learning groups, and encouraging employers to support informal learning in the workplace.
 - 71.10.5. supporting the wide use of online information and learning resources
 - 71.10.6. minimising overheads, bureaucracy, and administration

72. Prince's Trust

Overview

- 72.1. In order to deliver the team programme, You must get approval from the [Prince's Trust](#). and the WMCA.
- 72.2. For eligible WMCA residents aged 19 to 25, the WMCA will fund the team programme through the WMCA's adult funding methodology. Please also refer to the Princes Trust section in the [AEB funding rates and formula](#) guidance.
- 72.3. For eligible learners aged 16 to 19, the team programme is funded through the ESFA's 16 to 19 funding methodology, with further information available in the [rates and formula document](#).

73. Provide a Good Education up to Level 2

74. Introduction

- 74.1. Ensuring that all adults have a good education up to level 2 is essential to improving residents' life chances and tackling inequalities. It provides the necessary foundation for progression into further learning. It helps people succeed at work, find employment and earn more. It builds confidence and self-esteem, and improves health and well-being. It helps people with day-to-day activities such as managing finances and accessing public services.
- 74.2. We will continue to fund Legal entitlement qualification¹³ as listed below, in addition to creating bespoke programme that supports the movement of residents to level 2;
- 74.2.1. English and maths, up to and including level 2, for individuals aged 19 and over, who have not previously attained a GCSE grade 4 (C), or higher, and/or
 - 74.2.2. first full qualification at level 2 for individuals aged 19 to 23, and/or
 - 74.2.3. first full qualification at level 3 for individuals aged 19 to 23 and 24+ as part of WMCA flexibilities.
 - 74.2.4. Information technology ('digital') skills, up to and including level 1, for individuals aged 19 and over, who have digital skills assessed at below level 1.

75. Non-regulated learning/Flexibility

76. Overview

- 76.1. In the 2024/25 funding year, we will continue to fund Non-regulated learning through Skills funding, this includes;
- 76.1.1. Non-regulated learning aims in regional 'essential skills' offer, comprising:
 - National non-regulated aims for ESOL, maths, English and Digital
 - 76.1.2. New non-regulated learning aims (those created specifically for WMCA)
 - 76.1.3. New regulated learning aims (those created specifically for WMCA)
- 76.2. Where You deliver non-regulated learning, You must ensure it is eligible for funding. Such learning could include:
- 76.2.1. independent living skills or engagement learning, supporting adults to operate confidently and effectively in life and work.
 - 76.2.2. locally commissioned and/or locally developed basic knowledge and skills needed to access technical qualifications.
 - 76.2.3. employability and labour market re-entry

¹³ The legal entitlements for level 2 and level 3 follow the definition of fullness below. A learner can only be fully funded for one vocational qualification from the entitlement qualifications list when exercising their legal entitlement. Appropriate information, advice and guidance should be given to a learner and the learner should be made aware of their entitlement rights and progression routes on completing an entitlement qualification

- 76.2.4. locally commissioned and/or locally devised technical education short courses (also known as taster sessions)
- 76.2.5. Tailored learning courses

77. Offer

- 77.1. The eligibility principles the WMCA applies to non-regulated learning are as follows:
 - 77.1.1. It must not be provision linked to UK visa requirements.
 - 77.1.2. It must not be provision linked to statutory employer requirements (including a licence to practise) unless there is an agreed concession in place.
 - 77.1.3. It must not be vendor-specific provision, linked to a particular employer or commercial system unless this has been agreed as a flexibility.
 - 77.1.4. It must not be learning, for example, 'induction to college', that should be part of a resident's experience.
 - 77.1.5. It must not be a non-regulated version of a regulated qualification.
 - 77.1.6. It must not be above notional level 2 (that is, at notional levels 3 or 4). At notional level 2, it must focus on technical provision.
- 77.2. Where You are delivering non-regulated learning, You must ensure You have appropriate and robust quality assurance processes in place. For instance, 'The Recognising and Recording Progress and Achievement (RARPA) Cycle'. [Further information on RARPA](#) is available from the Learning and Work Institute.
- 77.3. It is the intention of the WMCA to use the RARPA model to monitor, review and measure the quality and outcomes from non-regulated provision in 2023/24. Non-regulated learning should have clear achievement aims for the residents and identified progression outcomes prior to commencement of learning.

78. English and maths for those aged 19 or older

79. Overview

- 79.1. WMCA will fully fund individuals, including individuals who are employed, aged 19 or older, who have not previously attained a GCSE grade A* to C or grade 4, or higher, in English and maths, as part of their legal entitlement on the day they start the following qualifications:
 - 79.1.1. GCSE English language or maths.
 - 79.1.2. Functional Skills English or maths from Entry to level 2.
 - 79.1.3. Stepping-stone qualifications (including components, where applicable) in English or maths approved by the Department for Education and ESFA.
- 79.2. If a resident wants to 'retake' their GCSE English and maths qualification because they did not achieve a Grade 4 or higher (C or higher), WMCA will not fund the resident to only resit the exam.
- 79.3. You must not enrol individuals on qualifications which are not necessary for progressing towards a GCSE or Functional Skill level 2.
- 79.4. You must not fund an apprentice for English or maths from the WMCA AEB.

80. offer:

- 80.1. All English and maths are funded as part of the statutory entitlement. Therefore, all courses funded as part of the entitlement can be found by accessing <https://www.gov.uk/guidance/qualification-funding-approval/other-approval-principles-statutory-entitlements>.
- 80.2. **You must:**
- 80.2.1. carry out a thorough initial assessment to determine an individual's current level using current assessment tools based on the national literacy and numeracy standards and core curricula.
 - 80.2.2. carry out an appropriate diagnostic assessment to inform and structure a resident file to use as a basis for a programme of study.
 - 80.2.3. enrol the resident on a level above that at which they were assessed and be able to provide evidence of this.
 - 80.2.4. deliver ongoing assessments to support learning.
 - 80.2.5. record the evidence of all assessment outcomes in the resident file.
 - 80.2.6. The assessments must place a resident's current skill levels within the level descriptors used for the RQF.

81. English for Speakers of Other Languages (English Language acquisition)

82. Overview

- 82.1. The WMCA will fully fund individuals aged 19 and over on the day they start their English Language acquisition learning aim where they are [unemployed](#) and meet the [eligibility criteria set](#). Where residents are employed, the low wage flexibility applies.
- 82.2. Providers offering English Language acquisition qualifications may need to deliver additional learning to individual residents that incurs additional costs above the qualification rate. You can access information on this in AEB funding rates and formula 2023 to 2024 guidance.

83. The Offer

- 83.1. Our intent is to fund a high-quality adult offer that enables residents to develop English language communication skills to support both their own personal health and well-being, secure work, or support in-work progression.
- 83.2. WMCA wants to see English Language acquisition become embedded within the delivery of occupational training or programmes of study. To support people into work providers can establish a non-regulated offer in English Language acquisition contextualised in line with the language expected within the sector e.g., care, retail, and construction.

- 83.3. WMCA also want to see the development of online delivery to make English Language acquisition training more accessible to residents, following a robust Initial Assessment to ensure they have the required digital skills to engage.
- 83.4. For all English Language acquisition training either accredited or non-regulated it is important to Us that individuals are clear on what they can progress to following successful completion of their learning.
- 83.5. WMCA has set clear expectations from Grant Providers that 25% of English Language acquisition delivered should be vocational English Language acquisition. WMCA will continue to support providers in reaching this target by 2025 in line with our investment plans.
- 83.6. Identification of Vocational English Language acquisition will be through a DAM code as referenced in the [Skills Programme Coding guidance](#).

84. Role of providers

- 84.1. Our expectation is that colleges and ITPs will also develop contextualised English Language acquisition embedded within wider occupational skills development to support residents into work.
- 84.2. Supporting Our inclusive growth agenda, We expect to see an improvement in progression to further learning and work through the development of essential English communication skills for our communities.

85. Digital entitlement for those aged 19 or older

86. Overview

- 86.1. Digital skills are as important to employability and participation in society as English and Maths, yet an estimated one in five adults lack basic digital skills.
 - 86.2. To address this, the Department for Education has introduced an entitlement to fully fund digital qualifications at level 1, alongside the existing legal entitlements to English and Maths.
 - 86.3. WMCA will fully fund individuals, including individuals who are employed, aged 19 or older, assessed at below level 1, as part of their legal entitlement on the day they start the following qualification.
87. Non-regulated digital skills provision must be aligned with the [Digital blueprint Guidance](#). In these circumstances, you must:
- 87.1. carry out an initial assessment using current assessment tools based on the national standards for essential digital skills.
 - 87.2. carry out an appropriate diagnostic assessment to inform and structure a learner file to use as a basis for a programme of study.
 - 87.3. enrol the learner on a level above that at which they were assessed and be able to provide evidence of this.
 - 87.4. deliver ongoing assessments to support learning.
 - 87.5. record the evidence of all assessment outcomes in the evidence pack.
88. The assessments must place a learner's current skill levels within the level descriptors used for the Regulated Qualifications Framework (RQF).

89. Full level 2

90. Overview

- 90.1. The WMCA values provision at level 2 as it provides individuals with the opportunity to develop core occupational skills. In addition, it provides the opportunity for progression to level 3 technical qualifications, which are key to supporting productivity and economic growth.
- 90.2. We will focus on ensuring that provision funded at level 2 enables progression to further learning and provides the opportunity to move to better-paid jobs.
- 90.3. Full level 2 is the level of attainment which is demonstrated by:
 - 90.3.1. a General Certificate of Secondary Education (GCSE) in 5 subjects, each at grade 4 (C) or above, or
 - 90.3.2. a Technical Certificate at level 2 which meets the requirements for the 16 to 19 performance tables.
- 90.4. If a resident aged 19 to 23 has achieved a level 2 qualification that was, at the time they started, or still is classed as a full level 2, any subsequent level 2 qualifications will be fully funded if they meet the definition of [unemployed](#) or meet the eligibility criteria for learners in receipt of [low wage](#).

91. Offer

- 91.1. Please refer to [Qualification Downloads - List of Qualifications approved for funding \(education.gov.uk\)](#).
- 91.2. To support individuals with the opportunity to develop core occupational skills, WMCA has provided a 10% uplift to full level 2 qualifications which align with sector propositions for Health & Social Care and level 2 qualifications aligned to sector plans in Construction from the academic year 2023/24 and will continue into the 2024/25 funding year.
- 91.3. By mapping clear vocational routes into entry points for working in these sectors, We aim to support more people to progress into work or within work. There is a Health & Social Care Plan for the health sector and the construction pathways are in place, and We are looking to collaborate with the sectors and our providers to map out further sector plans and set out the vocational routes to points of entry into work for Digital, Business & Professional and Engineering & Manufacturing.
- 91.4. We want to encourage increased delivery of high-value level 2 provision aligned with sector plans and relevance to employers, to support learners into sustainable employment. To do so, We are providing a 10% uplift to level 2 qualifications which align with sector propositions for Health & Social Care and Construction.
- 91.5. For Construction, We will only fund Level 2 provision on the Construction Level 2 uplift list, as these qualifications have been identified in collaboration with

the sector as aligned with current skills needs. Any additional requests will be reviewed through the business case process.

- 91.6. We want to continue collaborating with employers and learning organisations to ensure We can align provision in other sectors (business & professional, engineering & manufacturing, etc) to employer needs and vocational entry points and extend the Level 2 uplift to other sectors.

92. Level 2 Health & Social Care uplift qualification list

Learning Aim	Learning reference	aim
Extended Diploma in Health and Social Care	60188558	
Technical Certificate in Healthcare, Care and Childcare	60302963	
Diploma in Care (RQF)	60325549	
Diploma in Care	60326116	
BTEC Diploma in Care (England)	60327625	
Diploma in Care (RQF)	60328253	
Certificate in Preparing to Work in Adult Social Care	50115868	
Certificate in Preparing to Work in Adult Social Care	60000478	
Certificate in Preparing to Work in Adult Social Care (RQF)	60038251	
Certificate in Understanding Working in the Health Sector	60141281	
Certificate in Common Health Conditions	6014306X	
Certificate in Customer Service for Health and Social Care Settings	60304832	
Certificate in Common Health Conditions (RQF)	60330053	
Certificate in Introducing Caring for Children and Young People (RQF)	60330089	
Award in Customer Service for Health and Social Care Settings	60339949	
BTEC First Extended Certificate in Health and Social Care	60063129	

93. Level 2 Construction uplift qualification list

Learning Aim	Award Type
Brickwork Diploma Level 2	Diploma
Carpentry & Joinery Diploma Level 2	Diploma
Carpentry (Site) Diploma – Level 2	Diploma
Ceramic Wall & Floor Tiling Diploma Level 2	Diploma
Building Maintenance Operations Level 2	Diploma
Interior Systems NVQ	NVQ
Painting & Decorating Diploma Level 2	Diploma
Plastering Diploma Level 2	Diploma
Construction Industry Scaffolders Scheme (CISRS) Part 2 (Tube & Fitting)	License
Scaffolding NVQ Level 2	NVQ
Roof Slating and Tiling Level 2	Standard
Groundworks	NVQ
Cable Avoidance (Cat and Genny) NPORS	NPORS

Installing, Testing and Maintaining Air Conditioning Diploma (6187-01) Level 2	Diploma
Refrigeration Maintaining Systems Diploma (6187-02) Level 2	Diploma
F-Gases for Refrigeration and Air Conditioning City & Guilds Level 2	C & G
Electrical Installation (2365) Diploma Level 2	Diploma
Electrical Installations Diploma Level 2	Diploma
Smart Metering - Dual Fuel (7428-23) Diploma Level 2	Diploma
F-Gas and ODS Category 1 Regulations Award Level 2	Certificate
Heating & Ventilating Diploma Level 2	Diploma
Plumbing Diploma Level 2	Diploma
Unvented Hot Water Level 2	Certificate
Pipework Systems Mechanical Engineering Level 2	Diploma

94. Outcomes

- 94.1. We expect to see an increase in participation at level 2 in course areas that add value through up-skilling and progression. In addition, We anticipate that We will see more progression into level 3. We also expect to see a reduction in low-value qualifications that are delivered at scale with little progression or economic return for residents.

95. Multiply

96. Overview

- 96.1.1. The overall objective of Multiply is to increase the levels of functional numeracy in the adult population (aged 19 years and above) across the UK, as identified by the following success measures:
- 96.2. More adults achieving maths qualifications courses (up to, and including, Level 2 –with GCSEs and FSQs as the qualifications of choice in England – or equivalent).
- 96.3. Improved labour market outcomes e.g., fewer numeracy skills gaps reported by employers, and an increase in the proportion of adults that progress into sustained employment and/or education; and
- 96.4. Increased adult numeracy across the population – this overall impact, which goes beyond achieving certificates or qualifications, will track both the perceived and actual difference taking part in the programme makes in supporting learners to improve their understanding and use of maths in their daily lives, at home and at work - and to feel more confident when doing so.
- 96.5. WMCA's strategic priority for Multiply Funding will be primarily focused on those in-work within our Region helping adults find employment, progress at work, and improve their earnings and labour market outcomes. The WMCA's

aim is to reduce the number of residents with no or low qualifications across our region.

97. Offer

- 97.1. We will fund eligible learners where We have formally agreed the allocation and business case (delivery plan) with a provider.
- 97.2. Providers must make sure an individual is eligible for Multiply funding before including them in their claim. It is Your responsibility to check the eligibility of the resident at the start of each adult learning aim, and only include eligible residents in Your claim.
- 97.3. A condition that Multiply funds will only be provided where eligible costs are returned as detailed in Operational Plans.
- 97.4. It is Your responsibility to ensure that an individual meets the requirements of the funding and target groups outlined in Your Business Case schedule, issued as part of Your Agreement.
- 97.5. A condition that Multiply funds will only be provided where learners are engaged in safe and appropriate learning environments.
- 97.6. A condition that Multiply funds will only be provided where learners are protected from extremism and the provider complies with the 'Prevent' Duty guidance:<https://www.gov.uk/government/publications/prevent-duty-guidance>)
- 97.7. A requirement that arrangements exist for the appropriate handling and protection of Multiply learner data; and
- 97.8. A requirement of equal treatment and access to provision for Multiply funded learners and relevant adjustments under the Equality Act 2010: <https://www.gov.uk/guidance/equality-act-2010-guidance>

98. Learner Eligibility

- 98.1. This section sets out additional funding eligibility rules for learners funded through Multiply. Eligibility rules set out in the [Eligibility section](#) of this document are also applicable to learners funded through Multiply.
- 98.2. To be funded by the WMCA, residents must meet the following criteria:
 - 98.2.1. aged 19 or above on the first day of learning within the 2024 to 2025 funding year.
 - 98.2.2. Undertake a skills assessment that identifies they have functional maths skills below Level 2
 - 98.2.3. Be employed or imminently employed

99. Data Submission

- 99.1. Data submissions for Multiply will be processed in 2 ways: through the Individual Learner Record (ILR) and through completion of the WMCA Multiply

Monitoring Sheet. These must be submitted in line with the guidance provided in the Operational Plan within Your Agreement.

- 99.2. You must accurately complete all ILR fields as required in the ILR specification, even if they are not required for funding purposes.
- 99.3. The ILR must accurately reflect the learning and support (where applicable) You have identified, planned, and delivered to eligible individuals. You must not report inaccurate information that would result in an overstatement of the funding claimed.
- 99.4. Where Your data does not support the funding claimed, We will take action to correct this, and We could recover funds You overstated.
- 99.5. In addition to the information in this section, the Multiply Operational Plan has been provided with Your Agreement, which sets out how You should submit data and how the WMCA will undertake its financial due diligence, make payments, performance management, audit, and gain assurance from its providers.
- 99.6. WMCA has provided extra guidance regarding ILR coding please refer to the [Skills Programme Coding guidance](#) for more information.
- 99.7. You should also refer to the [ESFA ILR specification and provider manual for 2023/24](#), and any other relevant documents referred to in those documents.

100. Study Programmes

101. Overview

- 101.1. This section sets out the funding and eligibility rules for Study Programmes for adults aged between 19-24.
- 101.2. The decision to fund this learning is a recognition that not all young people have completed this type of full-time study by the age of 19 and that providing this offer does not become less costly for a provider when a learner turns 19.
- 101.3. In addition, youth unemployment rates (18-24-year-olds) in the West Midlands region have been historically above National rates by between 2 to 5 percentage points, emphasising the importance of supporting young adults to complete a study programme that will help them achieve good work.
- 101.4. The eligibility rules set out in this document's 'Eligibility' section also apply to learners funded through our Study Programmes.
- 101.5. The offer will support adults aged between 19-24 with a programme of study at level 3, however, learners who are not yet ready to begin a qualification at level 3 should be offered a tailored study programme at level 2 that supports them to progress to education at a higher level or to employment.
- 101.6. The programmes are designed to meet individual learning needs, offering opportunities to experience the world of work and non-qualification activities that support them to progress to further learning at Level 3, or in/into employment.

101.7. Providers can choose to continue to fund young adults on a standalone qualification basis if they deem it to be the most appropriate learning programme.

102. Learner Eligibility

102.1. We will fully fund individuals as part of this offer where they:

- 102.1.1. are aged 19 to 24 on 31 August within the funding year and
- 102.1.2. meet the eligibility requirements set out in the [Eligibility section](#) of this document.
- 102.1.3. are unemployed or meet the low wage criteria.

102.2. Learners aged 19 to 24 on 31st August 2024 who have an EHC Plan are eligible under young people's funding by ESFA.

102.3. Learners are usually only eligible for one WMCA funding model at a time as the funding provided is intended to cover the whole of their learning programmes.

102.4. Learners undertaking full-time higher education (HE) programmes are ineligible for Study Programme funding.

103. Study programme principles

103.1. We will fund eligible learners where the WMCA have formally approved a learning organisation to deliver Study Programmes.

103.2. As with 16-18-year-olds, the programmes should have a core aim, this will be tailored to the needs of the individual and typically include a substantial qualification (academic or technical) or preparation for employment.

103.3. The programme should be flexible and designed to meet learner needs.

103.4. Programmes should include non-qualification activities that complement the other elements of the programme and support the learners to progress to further or higher education (HE) or to employment. These could include.

- 103.4.1. English and Maths discreet modules
- 103.4.2. English and maths GCSE or Functional Skills Level 2, where learners have not yet achieved a GCSE grade 4.
- 103.4.3. Digital skills
- 103.4.4. Work experience to give learners the opportunity to develop their career choices and to apply their skills in real working conditions, and
- 103.4.5. other non-qualification activities to develop learners' character, broader skills, attitudes and confidence, and support progression, such as critical thinking, activities to develop personal confidence, character and resilience and where appropriate activities to develop teamwork, communications skills, leadership and problem-solving – skills required by employers.
- 103.4.6. Wrap-around support – driven by identified need.

103.5. Programmes will be funded by funding bands, which will be linked to the number of planned hours.

104. Work experience

- 104.1. Work experience is a crucial part of a study programme. It includes work tasters, learner enterprise, social action projects, volunteering, or placements with external employers.
- 104.2. It aims to help young adults develop their career choices, get a taste of work and critical employability skills.
- 104.3. All learners are expected to do work experience or training. Work placements can include evening, weekend and holiday hours.
- 104.4. Providers are expected to offer external placements wherever possible.
- 104.5. Placements can help learners gain practical experience and build employability skills. They can obtain references or job offers on completion of their course.
- 104.6. A high-quality work placement is purposeful, relevant, challenging, and structured, and provides tangible outcomes for learners and employers.

105. Wrap around support.

- 105.1. The programme offered should have a focus on wrap-around support to enable transition into employment for those who are not in employment and offer transferrable skills that will enable learners to adapt to future changes in the labour market.
- 105.2. Activities offered could include:
 - 105.2.1. tutorials and seminars, including Career, Education, Information Advice and Guidance.
 - 105.2.2. Mentoring/coaching in line with goals and aspirations and as informed by the Individual Learning Plan.
 - 105.2.3. Counselling to support with low self-esteem, confidence or mild anxiety.
 - 105.2.4. Access to or referral to specialist support e.g., drugs and alcohol use.
 - 105.2.5. Life skills, such as travelling independently, cooking and eating healthily, staying safe, making sustainable choices, managing personal finances, and preparing for adult or university life.

106. Planned hours.

- 106.1. Each study programme will consist of a number of planned hours (meaning hours that have been timetabled and are supervised by the provider). Providers must ensure that the number of hours is realistic and deliverable.
- 106.2. Programme are designed to be flexible and should cover both full and part-time options that are suitable to the learner.
- 106.3. Funding will be based on planned hours as listed below:

Band	Annual planned hours	National funding rate per learners
1	580+ hours	£4,753
2	485+ hours	£3,932
4	385 to 484 hours	£3,198
5	300 to 384 hours	£2,528
6	101 to 299 hours	£2,392
7	Up to 100 hours	£800

107. Data Submission

- 107.1. You must accurately complete all ILR fields as required in the ILR specification, even if they are not required for funding purposes.
- 107.2. The ILR must accurately reflect the learning and support (where applicable) You have identified, planned, and delivered to eligible individuals. You must not report inaccurate information that would result in an overstatement of the funding claimed.
- 107.3. Where Your data does not support the funding claimed, We will take action to correct this, and We could recover the funds You overstated.
- 107.4. In addition to the information in this section, the Performance and management rules have been provided, which set out how You should submit data and how the WMCA will undertake its financial due diligence, make payments, performance manage, audit and gain assurance from its providers.
- 107.5. WMCA has provided extra guidance regarding ILR coding please refer to the Skills Programme Coding guidance for more information.

108. Foundation Skills

109. Overview

- 109.1. Foundation Skills Programmes will offer a good quality, rounded educational with a focus on residents with no or low-level qualifications and in employment, to progress them to Level 2 provision that is aligned with our sector plans and labour market need.
- 109.2. The delivery must be diverse and flexible, allowing access to the provision around their work and personal commitments.
- 109.3. It must draw on learners' life experiences, nurturing their career aspirations with effective wrap-around support to secure strong educational attainment that will also enhance overall physical and mental health.

110. Offer

- 110.1. Foundation Skills programmes will be offered through two programmes depending on a learners' starting points and individual learning needs.
- 110.2. The mandatory elements of each programme will cover:
- 110.2.1. Maths (in line with Initial Assessment)
 - 110.2.2. English (in line with Initial Assessment)
 - 110.2.3. Digital (in line with Initial Assessment)
 - a) Component parts of English and Maths can be delivered e.g., speaking and listening, or using calculations where initial assessment identifies the gap.
 - b) Digital Skills can be delivered in modules, using the new WMCA Digital Pathways with appropriate focus, depending on sector, e.g., Word, PowerPoint, Internet and Social Media.
 - 110.2.4. Occupational Specific Training
 - a) Level 1 vocational offer, which should also provide a realistic context for learners to further develop the literacy, numeracy and digital skills being taught as part of the program. This offer must be aligned to WMCA's sector plans (where applicable) or labour market need. Must not include 'award' type qualifications.
 - 110.2.5. Enrichment
 - a) Provision to develop the individual's transferrable skills for progression into further learning and accelerate their access to employment, e.g., teamwork, communication, critical thinking, creative thinking, resilience, problem-solving skills (this is not an exhaustive list).
 - 110.2.6. Wrap around support.
 - a) Careers, Education, Information, Advice and Guidance (CEIAG) to determine what area of vocational training at level 2 provides best opportunity to support progression and clearly identified through a commitment from both the learner and provider.

111. Moving residents into good jobs

112. Introduction

113. The West Midlands is the UK's Growth Capital. After forging a position as the fastest-growing region outside London in the decade to 2019 and breaking through the £100 billion economic output mark, the region's industrial mix and demography meant it was hit particularly hard by the economic impact of the Covid pandemic and new trade frictions with the EU.
114. We have set out through our West Midlands [Plan for Growth](#) the path to returning to that trajectory, spreading opportunity and jobs across the region and helping level-up with the right employment training provision which will support our residents in gaining the skills to progress into sustainable employment, thereby playing a crucial role in underpinning this.

115. As set out in our latest [Local Skills Report](#), the focus is on securing stronger and more inclusive regional growth. Put simply, we want to deliver a better match between the skills of the people in our region and the current and future needs of our businesses, to accelerate productivity and deliver economic growth. We want to make sure more people have the skills they need to enter and progress in work.
116. The WMCA [Employment and Skills Strategy](#) sets out our vision for a responsive and flexible adult skills offer which supports a people-centred approach to ensuring the skills needs of businesses are met and everybody can benefit from economic growth.
117. Set out below are our training offers, which will support residents to move into good jobs, these include;
- 117.1. Into Employment programme.
 - 117.2. Construction Gateway programme

118. Into employment programmes

119. Overview

120. Into Employment Programme are designed to support unemployed and underemployed residents, including those in part-time contracts, zero-hour contracts, self-employed and inactive. Including those in work without basic skills, and sections of the community who suffer from inequality in the workplace, for example, disabled residents.
121. Programme are designed to move residents into employment and to upskill and support the progression of those in low-paid jobs.
122. Into employment programme funding methodology has been designed to replace SWAP/SG/CG delivery, with the aim to drive better outcomes for learners in bespoke provision that moves them into employment.

123. The Offer

124. Into-employment programmes will be co-created with employers to create a training offer that is occupationally specific to meet the needs of employers.
125. The programme should have a balance of skills development specific to the occupation and transferrable skill development including teamwork, communication, critical thinking, resilience and problem-solving skills.
126. The programme shouldn't be driven by qualifications and aims but focused on the progression outcome. Delivery should include a mix of teaching, instruction, coaching and mentoring.
127. Into-employment programmes should include wrap-around support bespoke to the resident.
128. The programme should build on levels of attainment once the individual secures a job or, for those already in-work, supports their in-work progression through accessing CEIAG wrap-around to raise aspirations.

129. To ensure consistency of provision with real value for money, effective curriculum design and a transparent funding methodology we have established a phased approach to programme funding.

130. Phase 1

- 130.1. All Phase 1 Into Employment programmes must include the below elements to support residents in successfully transitioning into secure employment.
 - 130.1.1. Occupational-specific training related to the job opportunity.
 - 130.1.2. Employability support and transferable skills development
 - 130.1.3. A guaranteed job interview on completion of the programme
- 130.2. Relevant work experience related to the job role will be an optional element, which will be funded separately and not part of the core programme costing or length.
- 130.3. A variety of programme lengths are available through the Into Employment provision. These can be used to ensure training meets the needs of the employer and the resident. We would expect the programme to be mapped against the needs and start point of the resident. Where it has been identified that they have barriers, we would expect the programme length to be longer.
- 130.4. All Into Employment programmes will attract a Day-1 job outcome payment and a Week 13 sustained employment payment.
- 130.5. For performance, we will set a benchmark based on sustainable employment at 13-weeks of 65%
- 130.6. Providers can develop 'Into employment' programmes in line with what is set out earlier but must be occupationally specific.
- 130.7. Phase 1 delivery codes will be set out programmes linked to SSA. The full coding is provided in the Skills Programme Coding guidance.
- 130.8. Economically inactive residents will have the option, on the length of the programmes, however, the delivery will typically have a stronger engagement activity through partnership working with community groups and the voluntary sector. In addition, delivery may be enhanced to support basic skills provision.
- 130.9. Into employment programmes for those who suffer from inequality in the workplace or have additional challenges due to ill health or disability, will also have the option of a short or long programme.

131. Phase 2/3

- 131.1. Phase 2 and 3 programmes will support residents who have moved into work following a Phase 1 programme or support residents who are in work and need additional training to upskill.
- 131.2. Phase 2 and 3 programmes will depend on your contractual terms or agreed delivery plans for Grants, please refer to your operational manual for more information.

132. Wrap-around

- 132.1. Wrap-around support funding will be available to cover the full life cycle of the learner's journey, including progression and tracking.

- 132.2. Wrap-around support should be individualised and used where a need is identified at any stage of the programme or afterwards.
- 132.3. Wrap-around support is intended to focus on areas that may be identified as needing additional support, outside of the core programme delivery, such as mentoring, coaching, additional CEIAG, mental health etc.
- 132.4. We expect providers to ensure they have a policy on how wrap-around support is identified and costed.
- 132.5. The WMCA will pay the cost of a license where it is an occupational requirement (e.g., SIA, FLT licence, CSCS) up to £500. In exceptional cases, the WMCA may agree on additional payment where the cost is above £500. Please note this is only where the cost isn't linked to the Direct costs of learning. (Please refer to the Glossary for the definition of Direct costs of learning)

133. **Construction Gateway**

134. Overview

- 134.1. The core focus of the Construction Gateway is to provide residents with the skills and knowledge required through the industry-standard outcomes e.g., the Construction Skills Certification Scheme (CSCS) and work with employers who will shape the training content and provide job vacancies for residents to be matched into
- 134.2. Construction Gateway is designed to support unemployed and underemployed residents, including those in part-time contracts, zero-hour contracts, self-employed and inactive. Including those in work without basic skills, and sections of the community who suffer from inequality in the workplace, for example, disabled residents.

33. The Offer

- 134.3. The programme should have a balance of skills development specific to the occupation and transferrable skill development including teamwork, communication, critical thinking, resilience and problem-solving skills.
- 134.4. The programme shouldn't be driven by qualifications and aims but focused on the progression outcome. Delivery should include a mix of teaching, instruction, coaching and mentoring.
- 134.5. Programmes should include wrap-around support bespoke to the resident which would include Careers, Education, Initial, Advice and Guidance (CEIAG), mentoring/coaching to develop the individual's transferable skills for progression into further learning and accelerate in-work progression.
- 134.6. The programme should build on levels of attainment once the individual secures a job or, for those already in-work, supports their in-work progression through accessing CEIAG wrap-around to raise aspirations.
- 134.7. Providers delivering CG, should have effective mechanisms and strong networks to engage people in work directly, not through an employer-based offer. They should offer a relevant and adaptable curriculum to support those

in work to access the construction gateway offer, leading to in-work progression.

135. Phase 1

- 135.1. Phase one programmes are focused on unemployed/economically inactive learners.
- 135.2. All Phase 1 must include the below elements to support residents in successfully transitioning into secure employment.
 - 135.2.1. Occupational-specific training related to the job opportunity.
 - 135.2.2. Employability support and transferable skills development
 - 135.2.3. A guaranteed job interview on completion of the programme
- 135.3. Provision must be in line with CSCS, CPCS or equivalent industry carding scheme requirements to ensure on completion of the programme the resident holds CSCS and an appropriate industry-accredited card e.g., CPCS.
- 135.4. Content of the delivery should be influenced by employers to enable the progression into employment.
- 135.5. For each resident they should be linked to a real job vacancy that they will have the opportunity to be matched against through an interview.
- 135.6. Construction Gateway Phase 1 programmes will attract a Day-1 job outcome payment and a Week 13 sustained employment payment.
- 135.7. Sustainment claims must evidence 13 weeks of continuous employment.
- 135.8. For performance, we will set a benchmark of 65% of adults who start as unemployed/inactive, progress into employment and sustain employment within 3 months of completion.
- 135.9. All learners who have not successfully progressed into sustainable employment to receive additional IAG, mentoring and/or coaching to support them into sustainable employment or further learning.
- 135.10. Phase 1 delivery codes will be set out programmes linked to SSA. The full coding is provided in the Skills Programme Coding guidance.
- 135.11. Two funding options are available for learners, we will only fund one per learner within a funding year.

136. Phase 2

- 136.1. Phase 2 programme can be offered to unemployed/economically inactive and those who are employed and low wage.
- 136.2. Learners can start directly onto Phase 2, where required or progress from Phase 1.
- 136.3. Four funding options are available for learners, we will only fund one per learner within a funding year.
- 136.4. Phase 2 must include the below elements to support residents in successfully transitioning into secure employment.
 - 136.4.1. Occupational-specific training related to the job opportunity.
 - 136.4.2. Employability support and transferable skills development
 - 136.4.3. A guaranteed job interview on completion of the programme.

- 136.5. Provision must be in line with CSCS, CPCS or equivalent industry carding scheme requirements to ensure on completion of the programme the resident holds CSCS and an appropriate industry-accredited card e.g., CPCS.
- 136.6. Content of the delivery should be influenced by employers to enable the progression into employment or In employment.
- 136.7. For performance, we will set a benchmark of 65% of adults who start as unemployed/inactive, progress into employment and sustain employment within 3 months of completion or 65% of adults who started as employed achieve one or more of the in-work progression outcomes:
 - 136.7.1. Increased salary
 - 136.7.2. Increased hours
 - 136.7.3. Promotion
- 136.8. All learners who have not successfully progressed into sustainable employment to receive additional IAG, mentoring and/or coaching to support them into sustainable employment or further learning.
- 136.9. Where learners start as unemployed/inactive, providers can claim a Day-1 job outcome payment and a Week 13 sustained employment payment.
 - 136.9.1. Please note, that only one Job outcome and 13-week sustainment can be claimed in one funding year across Phase 1 and 2.
- 136.10. Sustainment claims must evidence 13 weeks of continuous employment.
- 136.11. Phase 2 delivery codes will be set out programmes linked to SSA. The full coding is provided in the Skills Programme Coding guidance.

137. Phase 3

- 137.1. Phase 3 programme can be offered to those who are employed and low wage.
- 137.2. Learners can start directly onto Phase 3, where required or progress from Phase 1/2.
- 137.3. Three funding options are available for learners, we will only fund one per learner within a funding year.
- 137.4. Phase 3 must include the below elements to support residents in successfully transitioning into secure employment.
 - 137.4.1. Occupational-specific training related to the job opportunity.
 - 137.4.2. Employability support and transferable skills development
- 137.5. Provision must be in line with CSCS, CPCS or equivalent industry carding scheme requirements to ensure on completion of the programme the resident holds CSCS and an appropriate industry-accredited card e.g., CPCS.
- 137.6. For performance, we will set a benchmark of 65% of adults who started as employed to achieve one or more of the in-work progression outcomes:
 - 137.6.1. Increased salary
 - 137.6.2. Increased hours
 - 137.6.3. Promotion
- 137.7. Phase 3 delivery codes will be set out programmes linked to SSA. The full coding is provided in the Skills Programme Coding guidance.

138. Work Trial

- 138.1. Work Trials can be offered once, either as part of Phase 1 or Phase 2 to support progression.
- 138.2. Work Trials are intended to be, on-site in a simulated/ controlled environment to demonstrate construction plant job readiness.
- 138.3. Funding for work trials will be in addition to Phase 1 – 2 funding.

139. Wrap-around

- 139.1. Wrap-around support funding will be available to cover the full life cycle of the learner's journey, including progression and tracking.
- 139.2. Wrap-around support should be individualised and used where a need is identified at any stage of the programme or afterwards.
- 139.3. Wrap-around support is intended to focus on areas that may be identified as needing additional support, outside of the core programme delivery, such as mentoring, coaching, additional CEIAG, mental health etc.
- 139.4. We expect providers to ensure they have a policy on how wrap-around support is identified and costed.
- 139.5. The WMCA will pay the cost of a license where it is an occupational requirement (e.g., SIA, FLT licence, CSCS) up to £500. In exceptional cases, the WMCA may agree on additional payment where the cost is above £500. Please note this is only where the cost isn't linked to the Direct costs of learning. (Please refer to the Glossary for the definition of Direct costs of learning)

140. Pre - Apprenticeships

141. Overview

142. Where contracts have been awarded for pre-apprenticeships, we expect the pre-apprenticeship offer will be responsive and flexible and provide transitional support from unemployment into sustainable apprenticeships leading to further good work pathways.
143. The delivery of Pre apprenticeships should enable young people who are Not in Education Employment or Training (NEET) and between the ages of 19-29 to enter a range of quality apprenticeship offers across the region which align with the local and regional labour market to link our residents with good quality jobs.
144. The pre-apprenticeship offer should prepare young people for apprenticeship entry and has a balance of skills development specific to the occupation of entry, as well as digital, green skills and employability as minimum.

145. The Offer

146. Pre-Apprenticeship programmes will be co-created with employers to create a training offer that is occupationally specific to meet the needs of employers.
147. The programme should have a balance of skills development specific to the occupation and transferrable skill development including teamwork, communication, critical thinking, resilience and problem-solving skills.
148. Pre-Apprenticeship programmes should include wrap-around support bespoke to the resident which would include Careers, Education, Initial, Advice and Guidance (CEIAG), mentoring/coaching to develop the individual's transferable skills for progression into further learning and accelerate in-work progression.

149. Phase 1

- 149.1. All Pre-Apprenticeship will include.
 - 149.1.1. Occupational-specific training related to the job opportunity.
 - 149.1.2. Relevant work experience related to the job role.
 - 149.1.3. Job interview at the end of the programme
- 149.2. Wrap-around support funding will be available to cover the full live cycle of the learner's journey, including progression and tracking.
- 149.3. For performance, we will set a benchmark based on sustainable employment at the 13-weeks of 65%
- 149.4. Sustainable apprenticeships are defined as apprenticeships offered by employers as part of their workforce plans that are a minimum of 1 year in duration.
- 149.5. Providers can develop 'Into employment' programmes in line with what is set out earlier but must be occupationally specific.
- 149.6. Pre-Apprenticeship delivery codes will be set out programmes linked to SSA. The full coding is provided in the Skills Programme Coding guidance.

150. *Up-skilling and re-skilling*

151. Introduction

- 151.1. Higher-level skills and qualifications are becoming increasingly important to our regional economy – in strengthening existing businesses, in improving productivity and in attracting inward investment. They matter for individuals too. People with higher level qualifications and who develop higher level skills throughout their working lives are more likely to be employed, more likely to earn more when employed, and are more resilient to labour market change.
- 151.2. We plan to work with employers, colleges and training providers to expand our level 3 training offer. Our goal is to make this training accessible to those who are employed, affordable for those who are low-paid, and aligned with regional economic priorities. Achieving this will require greater collaboration between providers, more flexibility in delivery and additional investment in level 3 training.

152. Free Courses for Jobs (FCFJ) additional Funding Rules

153. Overview

- 33.1. This section sets out additional funding eligibility rules for learners funded through Free Courses for Jobs (FCFJ). Eligibility rules set out in the Eligibility section of this document are also applicable to learners funded through FCFJ.
- 33.2. Free courses for jobs (FCFJ) are a targeted level 3 offer to support adults without an existing full level 3 qualification and adults who meet the definition of 'low wage' or 'unemployed'.
- 33.3. The offer includes:
 - 33.3.1. level 3 qualifications which will support the development of new skills for adult learners and improve the prospects of eligible adults in the labour market. Eligible adults aged 24+ can now access fully funded level 3 provision from the list of level 3 FCFJ qualifications available via the DfE list of qualifications approved for funding.
 - 33.3.2. additional level 3 qualifications for 19 to 23-year-olds that are not included in the legal entitlements.
 - 33.3.3. support funding
 - 33.3.4. the ability for eligible learners to take one short qualification (identified by category code 49) without exhausting their eligibility. We expect this flexibility to be used where a learner could benefit from a more substantial qualification once they have completed a short qualification.
 - 33.3.5. WMCA will also fund additional qualifications as listed below through Free Courses for Jobs. Please note these are only available to fund via WMCA funding.

34. Offer

- 34.1. We will fund eligible learners where the WMCA have formally agreed the allocation and qualifications with the provider.
 - 34.1.1. Please note 19–23-year-old funding will be paid through AEB, a provider must have access to AEB funding, prior to enrolling residents who are 19–23-year-old.
- 34.2. Providers must make sure an individual is eligible for FCFJ funding before claiming funding for them. It is Your responsibility to check the eligibility of the resident at the start of each adult learning aim, and only claim funding for eligible residents.
- 34.3. An uplift is payable at 2 different rates and follows the earnings methodology set out in the [funding rates and formula document](#). This uplift should be used to support delivery of the level 3 FCFJ offer.

- 34.4. Only level 3 qualifications included in this offer will attract an uplift. There may be additions to the list to ensure it meets the needs of the economy; we encourage providers to check funding validity regularly. Valid qualifications will have category codes 45, 46, 48 or 49 on [find a learning aim](#). Please ensure you refer to the category codes rather than the funding stream on [find a learning aim](#)
- 34.5. When qualifications are added to the list of qualifications included in this offer, they will become eligible for funding from that publication date and will not be backdated.
- 34.6. Please note this policy is subject to potential further amendments and clarifications.
- 34.7. You must not claim for ESFA AEB funding where learners are already being funded through an advanced learner loan (ALL), or a [Skills bootcamp](#) (where applicable), for qualifications that are in the FCFJ offer. The criteria for ALL can be found in the [Advanced Learner Loans funding rules](#).
- 34.8. Once a learner has been funded by FCFJ in line with the paragraphs above, they will have exhausted their eligibility for the offer and can no longer access FCFJ funding. Learners accessing the low-wage and unemployment flexibilities cannot be funded if they have previously been funded via FCFJ.
- 34.9. It is important that providers continue to ensure they work within the performance parameters for FCFJ and that 70% of funding is focused on Diploma delivery.
- 34.10. From 1st August 2023, the WMCA-approved FCFJ will be subject to a 10% uplift, in the same way it has been applied to the AEB provision. This will not apply to the National approved list, which already has an uplift applied.

35. Learner Eligibility

- 35.1. This section sets out additional funding eligibility rules for learners funded through Free Courses for Jobs. Eligibility rules set out in the [Eligibility section](#) of this document are also applicable to learners funded through FCFJ, with the following variations.
- 35.2. We will fully fund individuals as part of this offer where they:
 - 35.2.1. are aged 19 to 23 on 31 August within the 2023 to 2024 funding year: and
 - 35.2.2. have not achieved a full level 3 qualification, or above, irrespective of their income.
 - 35.2.3. enrol on the level 3 FCFJ qualifications approved for funding. Please note this will be funded through AEB, so you must have access to an AEB allocation.
- 35.3. We will fund eligible learners to take one 'short' qualification without exhausting their eligibility, followed by one further qualification in the level 3 FCFJ offer. 'Short' qualifications are identified by category code 49 which can be found in the level 3 FCFJ offer – short qualification within [find a learning aim](#).
- 35.4. We will also fund individuals who are 24+ and enrol on the level 3 FCFJ qualifications approved for funding.

35.4.1. for their first level 3

35.4.2. where they are [unemployed](#), or they meet the [low wage criteria](#), including individuals who already have a level 3 qualifications or higher.

36. Data Submission

- 36.1. You must accurately complete all ILR fields as required in the ILR specification, even if they are not required for funding purposes.
- 36.2. The ILR must accurately reflect the learning and support (where applicable) You have identified, planned, and delivered to eligible individuals. You must not report inaccurate information that would result in an overstatement of the funding claimed.
- 36.3. Where Your data does not support the funding claimed, We will take action to correct this, and We could recover funds You overstated.
- 36.4. In addition to the information in this section, the [Performance and management rules](#) have been provided, which sets out how You should submit data and how the WMCA will undertake its financial due diligence, make payments, performance manage, audit and gain assurance from its providers.
- 36.5. WMCA has provided extra guidance regarding ILR coding please refer to the [Skills Programme Coding guidance](#) for more information.

37. Additional FCFJ-approved qualifications for delivery.

- 37.1. In addition to the [national Free Courses for Jobs qualifications](#), WMCA will also fund additional qualifications as listed below in line with the Free Courses for Jobs (FCFJ) funding eligibility.
- 37.2. You must ensure you use LDM code 378 when recording these learners on the ILR (and LDM code 391 when recording learners who meet the earnings threshold criteria or are unemployed
- 37.3. record the employment status of learners accessing the offer in the ILR
- 37.4. Please note: These qualifications will not attract the FCFJ national uplift, however, will receive the 10% WMCA uplift.

Aim Reference	Aim Title
40006669	Access to Higher Education Diploma: Midwifery
40008265	Access to HE Diploma (Computer Science)
40008393	Access to HE Diploma (Health Professions)
40008848	Access to HE Diploma (Science)
40008873	Access to HE Diploma (Social Science and Humanities)
40009609	Access to HE Diploma (Public Sector Services and Policing)
40009749	Access to HE Diploma (Health Professions)
40010351	Access to HE Diploma (Business and Law)
40010363	Access to HE Diploma (Business and Management)
40010387	Access to HE Diploma (Education)
40010399	Access to HE Diploma (Engineering)

40010417	Access to HE Diploma (Health Science)
40010430	Access to HE Diploma (Land Based Studies)
40010879	Access to HE Diploma (Business)
40010892	Access to HE Diploma (Computing)
40010910	Access to HE Diploma (Education)
40010922	Access to HE Diploma (Engineering Science)
40010958	Access to HE Diploma (Health and Social Care)
40010995	Access to HE Diploma (Law)
40011082	Access to HE Diploma (Science)
40011094	Access to HE Diploma (Social Science)
40011100	Access to HE Diploma (Sports Science)
40012360	Access to HE Diploma (Radiography)
40012384	Access to HE Diploma (Health and Social Care)
40012414	Access to HE Diploma (Humanities and Social Science)
40012529	Access to HE Diploma (Health Professionals)
40012530	Access to HE Diploma (Midwifery)
40012542	Access to HE Diploma (Nursing)
40012554	Access to HE Diploma (Social Science)
40012566	Access to HE Diploma (Social Science and Health)
40012578	Access to HE Diploma (Social Work)
40012785	Access to HE Diploma (Early Years)
40012876	Access to HE Diploma (Health Science Professions)
40012888	Access to HE Diploma (Humanities and Social Sciences)
40012906	Access to HE Diploma (Science)
40012931	Access to HE Diploma (Art and Design)
00295237	Air Source Heat Pumps
50099899	Diploma in Accident Repair Paint Principles
60312750	Award in Inspection and Testing
60324983	Certificate in Supporting Teaching and Learning
60054992	Diploma in Electrical Installations (Buildings and Structures)
6032496X	NCFE Diploma in Supporting Teaching and Learning Level 3
Z0009726	Electric Vehicle - Level 3
60101027	Diploma in Coaching and Mentoring
60166071	NVQ Diploma in Business Improvement Techniques
60165546	Advanced Diploma in Accounting - Level 3
60106852	BTEC Award in Education and Training
60347259	Diploma in Fitness Instructing and Personal Training
50102771	Diploma in ICT Systems and Principles for IT Professionals
60014829	Diploma in Women's Hairdressing
60173488	Advanced Technical Diploma in Hairdressing (540)
60139651	Diploma in Business Administration
6100263X	Certificate in Cyber Security Principles
40010739	Access to HE Diploma (Accountancy; Finance and Banking)
60170748	Certificate in Principles of Business Administration (VRQ) 60170748
60169692	Learning & Development
60139742	Customer Service

61005678	L3 Diploma in Business Administration
40009269	Access to HE Diploma in Business - Reference: 40009269
60174079	Advice & Guidance
60326748	L3 Diploma in Adult Care
60352048	NVQ Diploma in Occupational Work Supervision (Construction) 60352048
6031610X	Certificate in Cyber Security Principles

33. National Skills Fund Technical Bootcamps additional Funding Rules (Wave 5)

34. Overview

- 37.5. This section sets out additional funding eligibility rules for learners funded through NSF Technical Bootcamps. Eligibility rules set out in the [Eligibility section](#) of this document are also applicable to learners funded through NSF Technical Bootcamps, Wave 5.
- 37.6. Skills Bootcamps offer free, flexible courses of up to 16 weeks, with a guaranteed job interview (where a candidate is being recruited to a new job or new opportunities), which equip adults with technical skills that enable them to access in-demand jobs, apprenticeships, and new opportunities (including for the self-employed)
- 37.7. They give people the opportunity to build up sector-specific skills and fast-track to an interview with an employer.
- 37.8. Skills Bootcamps are developed in partnership with employers, colleges, training providers and local authorities. They help people in England develop the skills that are in demand in their local area and get a better job.
- 37.9. We will only fund a completion and/or outcome if it relates to an organisation registered as a UK company under the Companies Act 2006 and/or is located in England.
- 37.10. Further information can be found in the [Wave 5 Bootcamp Guidance](#). Skills Bootcamp providers should use this document in conjunction with Skills Programme Funding rules.

38. Offer

- 38.1. Providers must make sure an individual is eligible for NSF Technical Bootcamp funding before claiming funding for them. It is Your responsibility to check the eligibility of the resident at the start of each adult learning aim, and only claim funding for eligible residents.
- 38.2. Skills Bootcamps must be delivered at Level 3-5 or equivalent, except Skills Bootcamps in Construction and Green Skills which may be delivered at Level 2 or equivalent.
- 38.3. All training must either be accredited, aligned to occupational standards managed by the Institute for Apprenticeship & Technical Education or utilise a recognised standard for representing attainment (e.g., Recognising and Recording Progress and Achievement (RARPA), Skills Framework for the Information Age (SFIA) – Where the third pathway is chosen, We would expect a higher standard of evidence for employer engagement.

38.4. Bootcamps are fully funded for independent learners, however, where these are being delivered/led by an employer, We ask for a 30% contribution from large employers or a 10% contribution from SMEs¹⁴.

39. Learner Eligibility

This section sets out additional funding eligibility rules for learners funded through Wave 5 of Skills Bootcamps delivery (Learner Starts 01/04/2024 - 27/03/2025) Eligibility rules set out in the [Eligibility section](#) of this document are also applicable to learners funded through Wave 4, with the following variations.

39.1.1. As the Bootcamps are a national grant the guidance from DfE is that this funding can be used to fund any learner in England, therefore you would not be restricted to funding learners within the prescribed WMCA devolved postcode area.

39.1.2. We are keen to ensure that this funding benefits both residents and businesses within the West Midlands, therefore, are offering some guidance: You can recruit learners who are in the West Midlands but do not fall into the postcode list previously supplied (this opens it up to learners who sit outside the AEB postcode parameters) this means you can deliver bootcamps to anyone in England however, the expectation is they?

39.1.2.a.1. Are either a resident in the West Midlands Combined authority area and/or

39.1.2.a.2. Move into a role within the West Midlands

39.1.3. We will fund an individual who does not live in England if specialist skills training is only available in England and the individual intends to work in England as a result of the Skills Bootcamp. We do not expect these numbers to be significant.

39.2. Skills Bootcamps are designed for individuals who are closer to the labour market and the assumption is that the majority of participants will have been away from the labour market for less than 12 months. A Provider may only deliver a Skills Bootcamp to support adults who have not been in work for longer than 12 months if they judge that a Skills Bootcamp will support them effectively into a job outcome.

39.3. No prior attainment is required unless specifically prescribed by an employer and/or specifically related to the job and sector within which the vacancies offered are situated. However, Providers may have defined selection processes and/or assessments as part of their approach to recruitment of learners.

¹⁴ Any organisation that has fewer than 250 employees and a turnover of less than €50 million or a balance sheet total less than €43 million

- 39.4. An adult may generally only undertake one Skills Bootcamp per financial year (1 April to 31 March) and must not be on more than one Skills Bootcamp at any one time. Providers have an obligation to ask prospective learners whether they have already undertaken a Skills Bootcamp in that funding year and if they are currently undertaking a Skills Bootcamp.
- 39.5. However, where an individual starts a Skills Bootcamp and then realises that it is not suitable for them for whatever reason, they may start, and be funded for, another Skills Bootcamp so long as they have not met/achieved the first milestone payment (limited to two starts per financial year).
- 39.6. Where an individual starts a Skills Bootcamp in one funding year, and for some reason does not complete it until the next funding year, the start date will determine whether they are eligible to undertake another Skills Bootcamp.
- 39.7. Skills Bootcamps should be designed to encourage the participation of underrepresented groups, such as those with protected characteristics and those who might face barriers to employment e.g., veterans.
- 39.8. Skills Bootcamps are also open to serving prisoners due to be released within 6 months of completing a Skills Bootcamp, and those on temporary release.

40. Course length

- 40.1. The Provider must offer Skills Bootcamps of a minimum of:
 - 40.1.1. 100 Guided Learning Hours (GLH) over a maximum of 16-weeks for Digital Skills Bootcamps.
 - 40.1.2. 60 GLH over a maximum of 16-weeks for all other sectors.
- 40.2. Guided Learning is defined as follows:
 - 40.2.1. Guided Learning is the activity of a learner being taught or instructed by – or otherwise participating in education or training (including placement, onsite or practical education or training) under the immediate guidance or supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training, with the simultaneous presence of the learner and that person in the same physical or virtual space. This could include, but is not limited to, simultaneous presence: in a classroom, in a virtual classroom or breakout room, on-site, placement, or other physical learning environment.
 - 40.2.2. GLH can include learners being taught content in the same physical or virtual space (such as a classroom style delivery), as well as undertaking project work, workshops and assessments which are under the regular guidance, supervision and support of a tutor i.e. the tutor is ‘circulating’, checking in on groups/learners, offering advice, guidance and feedback, asking prompt questions to stimulate ideas, getting learners on the right path etc. This can also include work-based activities and coaching and mentoring among others.
 - 40.2.3. GLH does not cover examples where learners are sent off to do a project independently, in groups or alone where the tutor is not regularly supporting or interacting in the ways described above i.e. it does not include time spent on unsupervised preparation or study, whether at home or otherwise. It also does

not include optional, drop-in sessions that learners can book in addition to the planned guided learning hours set out for the Skills Bootcamp.

41. Course Content & Flexibility

- 41.1. The Provider must ensure that the Skills Bootcamps:
 - 41.1.1. Can be reasonably delivered to a Learner concurrently employed in either a full-time or part-time role or around other commitments,
 - 41.1.2. Are accessible to Learners,
 - 41.1.3. Training Providers must make reasonable adjustments, as appropriate for those Learners with Protected Characteristics (as defined by the [Equality Act 2010](#)),
 - 41.1.4. We will not fund any part of any learner's learning aim or programme that duplicates provision they have received from any other source.
- 41.2. The Provider must deliver a 'wraparound service' of Learner support (for example, using a coaching and mentoring approach, from programme application stage, during, and post programme, to move people into jobs/new roles and opportunities. This should include upfront screening of applicants, soft skills (or work readiness) training to support the occupational skills training, vacancy/role/opportunity identification, providing pastoral services to help participants complete the Skills Bootcamp and follow-up services to participants and employers to support job placement mentorship, pastoral support) and high-quality advice and guidance to support the learner into a positive employment outcome (for example, CV writing support, mock interviews).
- 41.3. The Provider may deliver Skills Bootcamps remotely online or face to face or through a blended approach.

42. Data Submission

- 42.1. You must accurately complete all ILR fields as required in the ILR specification, even if they are not required for funding purposes.
- 42.2. In addition, providers are asked to complete a spreadsheet monthly, which should be returned in line with the data submission timetable which you will find in the [Wave 5 Bootcamp Guidance](#).
- 42.3. Please note, if You deliver multiple Skills Bootcamp, then a separate return is required for each Skills Bootcamp.
- 42.4. Multiple cohorts of the same Skills Bootcamp delivered by a single provider must be captured on the same data return.
- 42.5. Where Your data does not support the funding claimed, We will take action to correct this, and We could recover funds You overstated.
- 42.6. In addition to the information in this section, the [Performance and management rules](#) have been provided, which sets out how You should submit data returns and how the WMCA will undertake its financial due diligence,

make payments, performance manage, audit and gain assurance from its providers.

- 42.7. WMCA has provided extra guidance regarding ILR coding please refer to the [Skills Programme Coding guidance](#) for more information. Providers will also have been issued with the [Wave 5 Bootcamp Guidance](#).
- 42.8. Data must be reported in a timely manner, outcomes can be achieved up to 6 months from the end of the Skills Bootcamp, however, please note for Wave 4 the cut-off date will be 30th September 2024.

43. Employer Co-Funded Learners

- 43.1. Where an employer is training an existing employee, they must contribute to the cost of the course. The amount of contribution is determined the size of the employer (a small or medium-sized employer is defined as having fewer than 250 employees).
- 43.2. In the case of large employers, DfE will cover 70% of the cost of the Skills Bootcamp with the remaining 30% of the agreed learner rate to be funded by the employer.
- 43.3. In the case of small and medium employers DfE will cover 90% of the cost of the Skills Bootcamp, so the employer contribution is reduced to 10%.
- 43.4. Existing employees are defined as someone directly employed by the employer, not a worker, sub-contractor freelancer, director or officeholder.
- 43.5. However, where a director or office holder is also an employee the employer will be expected to contribute. Further information on employment status is available.
- 43.6. The entirety of the cash co-funding contribution must be from the employer and cannot be substituted for any additional in-kind contribution (e.g. the supply of equipment or expertise etc).
- 43.7. Providers are responsible for ensuring they collect, and maintain evidence of, payment of the employer's contribution. This will need to be evidenced in the form of an invoice from the training provider to the employer.
- 43.8. Providers are free to agree further funding contributions from employers should they want to enhance the content of the Skills Bootcamp.
- 43.9. Courses are fully funded by Government for independent learners (individuals not being co-funded by their employer), and for the self-employed.
- 43.10. Individuals must not be charged for any element of the Skills Bootcamp.

44. Evidence requirements

- 44.1. The DfE and WMCA will conduct random sampling checks of learner and employer evidence throughout the duration of the Agreement aligned to

- reporting periods. We reserve the right to vary the volume and frequency of checks over the lifetime of the contract.
- 44.2. At the specified submission points, You will receive a random sample based on the learner data included within the data returns. This will be presented in a table and sent to You to complete as You collate the required evidence.
 - 44.3. It is therefore imperative that You have access to learner evidence for 100% of learners who are participating in the Skills Bootcamps.
 - 44.4. The evidence checks are retrospective by default and do not impact Our ability to authorise payment claims. However, if any issues arise from any part of the process relating to data returns, payment claims or previous evidence checks, We reserve the right to conduct evidence checks in advance of releasing payment.
 - 44.5. Providers must ensure that residents meet the eligibility as set out in this document.
 - 44.6. Evidence overview can be found in [Wave 5 Bootcamp Guidance](#).

154. Full level 3

155. Overview

- 155.1. It is key that We build the right skills in our workforce to deliver improved productivity and prosperity - enabling all groups to access jobs. While qualification levels are improving, significant shortfalls remain at level 3 impacting on productivity, competitiveness and inward investment which hold back growth of the regional economy. In addition, low skills also impact on earnings and household income for residents in securing sustainable employment in higher-skilled job roles.
- 155.2. Full Level 3 is the level of attainment which is demonstrated by a:
 - 155.2.1. General Certificate of Education at the advanced level in 2 subjects
 - 155.2.2. General Certificate of Education at the AS level in 4 subjects
 - 155.2.3. QAA Access to Higher Education (HE) Diploma at level 3
 - 155.2.4. Technical, or applied general qualification at level 3, which meets the requirements for the 16 to 19 performance tables.
 - 155.2.5. Core maths at level 3
- 155.3. Please contact aeb.enquiries@wmca.org.uk if you need advice on a previous qualification's designation.
- 155.4. For new linear AS and A levels, where a resident enrolls on an AS qualification and continues with further study to take the A level qualification in the same subject, You must record both the AS and A level in the ESFA ILR. The AS learning aim will be funded separately to the A-level learning aim.

156. The Offer

- 156.1. We are clear that We want to establish an adult offer at level 3 to meet Our regional skills plan priorities. We expect to see entitlement qualifications and

Our priorities reflected in course portfolios at level 3 and will continue to use Our funding flexibilities to support residents.

- 156.2. The WMCA will provide partial or full funding Level 3 qualifications and units where they support progression in work or career changes through re-training. This will be agreed as part of your delivery plan with agreed levels of contribution in line with RSP priorities.
- 156.3. Providers must submit a business case for changes to their delivery plan.

157. Full level 4+

158. Overview

- 158.1. West Midland Combined Authority (WMCA) is continuing a local flexibility in 2023/24 academic year to support local skills needs at Level 4+.
- 158.2. Providers wishing to offer level 4+ qualifications must have these agreed as part of their approved Delivery Plan with the WMCA prior to any delivery commencing.
- 158.3. These can be full or modular level 4+ qualifications either available from Learning AIM or a locally agreed qualification.

159. The Offer

- 159.1. Provision at level 4+ will be developed exclusively against Our priorities as set out in the WMCA Local Industrial Strategy (LIS). We will consider either full or unitised delivery against published courses.
- 159.2. We are also keen to explore providers putting together an adult offer of learning at Level 4 where qualifications don't currently exist e.g., new emerging sectors or to meet the needs of residents.
- 159.3. We want an offer that people can access independently of their employer like the old 'night school' concept but offered in flexible ways – modes, times, and locations. It's also important to Us that individuals are clear on what they can move onto and progress to, following successful completion of their learning.

Annex A: eligibility for funding

This Annex sets out the countries falling within the below categories as referenced in the [residency eligibility](#) section.

British Overseas Territories

- Anguilla
- Bermuda
- British Antarctic Territory
- British Indian Ocean Territory
- British Virgin Islands
- Cayman Islands
- Falkland Islands
- Gibraltar
- Montserrat
- Pitcairn, Henderson Island, Ducie and Oeno Islands
- South Georgia and the South Sandwich Isles
- St Helena and its dependencies (Ascension and Tristan da Cunha)
- Turks and Caicos Islands

Economic European Area (EEA)

The EEA comprises of the following countries:

- All Member States of the European Union

You can access a list of member states on the [EU website](#).

- with respect to EEA nationality, note that any Cypriot national living on any part of the island qualifies for EU residency and is considered an EU national.
- Iceland
- Lichtenstein
- Norway

[Table 3](#) lists territories that are categorised as being within the EU and or territories that are categorised as being part of the listed countries such that they satisfy our residency requirements for the purposes of the Skills programme funding rules.

Table 1:

Denmark	The following is part of Denmark: Greenland, Faroe Islands
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Finland	The following is part of Finland and the EU: Aland islands
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France	The following is part of France and the EU: the French Overseas Department (DOMS) (Guadeloupe, Martinique, French Guiana (Guyana), Reunion and Saint-Pierre et Miquelon) The following is part of France: New Caledonia and its dependencies, French Polynesia, Saint Barthélemy
Germany	The following is part of Germany and the EU: Tax-free port of Heligoland
Netherlands	The following is part of the Netherlands: Antilles (Bonaire, Curacao, Saba, St Eustatius, and St Maarten), Aruba
Portugal	The following is part of Portugal and the EU: Madeira, The Azores
Spain	The following is part of Spain and the EU: the Balearic Islands, the Canary Islands, Ceuta, Melilla

Annex B – Glossary

Term	Description
20+ childcare	A category of learner support to assist learners aged over the age of 20 who are at risk of not starting learning or leaving learning due to issues in obtaining childcare.
Advanced learner loan	Advanced learner loans are available for individuals aged 19 or above to undertake approved qualifications at levels 3 to level 6, at an approved provider in England. Advanced learner loans give individuals access to financial support for tuition costs similar to that available in higher education and are administered by Student Loans Company.
Annual gross salary	Gross salary is the total income before any deductions are removed from that amount. This total income is usually described as an annual salary, and it is the total amount an employee will receive for work completed before tax and national insurance contributions are deducted.
Break in learning	When a learner is not continuing with their learning but has told You beforehand that they intend to resume their learning in the future.
Brokerage	By brokers, We mean where a third-party match, for a fee, a provider with an unused allocation with a provider that can secure enrolments of learners to utilise it.
Care to learn	A Department for Education scheme to assist young parents under the age of 20 with the childcare costs that may form a barrier to them continuing in education.
Tailored Learning (former Community learning)	Helps people of different ages and backgrounds gain a new skill, reconnect with learning, pursue an interest, and learn how to support their children better, or prepare for progression to more formal courses/employment.
Components of regulated qualification	A subset of a qualification, which could be a unit.
Continuing learners	Learners who commenced learning in a previous funding year and remain in learning as of 1 August 2023.

Devolution of adult education functions	The devolution of adult education functions refers to the transfer of certain Secretary of State functions in the Apprenticeships, Skills, Children and Learning Act 2009 to specified Mayoral Combined Authorities by way of Orders made under section 105A of the Local Democracy, Economic Development and Construction Act 2009, and the delegation of those functions to the Mayor of London under section 39A of the Greater London Authority Act 1999, in relation to their areas.
Digital Entitlement	The study of Essential Digital Skills (EDS) qualifications for learners who have digital skills assessed at below level 1. Qualifications that are designated up to and including level 1 are Essential Digital Skills Qualifications.
Direct costs of learning	Any costs for items without which it would be impossible for the learner to complete their learning aim. This can include the costs of registration, examination or any other activities or materials without which the learner cannot achieve their programme of study.
Earnings adjustment statement (EAS)	The form providers need to fill in to claim funding that cannot be claimed through the Individualised Learner Record (ILR).
Education Health and care (EHC) plan	An EHC plan replaces statements of special educational needs and learning difficulty assessments for children and young people with special educational needs. The local authority has the legal duty to 'secure' the educational provision specified in the EHC plan, that is, to ensure that the provision is delivered.
Employment status (formerly employed)	The main types of employment status are worker, employee, self-employed and contractor, director, and office holder. More information on employment status is available.
English Language acquisition	The study of English by speakers of other languages – Formally referred to as ESOL
European Economic Area (EEA)	The European Economic Area, abbreviated as EEA, consists of the Member States of the European Union (EU) and 3 countries of the European Free Trade Association (EFTA) (Iceland, Liechtenstein, and Norway; excluding Switzerland). The Agreement on the EEA entered into force on 1 January 1994. Please refer to Annex A for more information.
European social fund (ESF)	The ESF is a structural fund from the European Union (EU). It improves the skills of the workforce and helps people who have difficulties finding work.
European Union	A list of member states is available on the EU website
Evidence pack	A collection of documents and information is brought together to form a single point of reference relating to learning that is taking place. This must provide evidence to prove the learner exists, is eligible for funding, the planned learning to be provided, and that learning has been delivered.
Exceptional learning support	Learning support funding to meet the costs of putting in place a reasonable adjustment for a learner who requires more than £19,000 in a funding year.
Find a learning aim	Find a learning aim provides online services to find the latest information on available qualifications, apprenticeship standards, T Levels, and units. Standards will show You information on funding, dates, and common components. Qualifications and units show You funding streams for courses and the last date learners can start.
Full level 2	The following qualifications are designated full at level 2: General Certificate of Secondary Education in 5 subjects, each at grade C or above or grade 4 or above or a Technical Certificate at level 2 which meets or has previously met the requirements for 16 to 19 performance tables

Full level 3

The following qualifications are designated full at level 3: General Certificate of Education at the advanced level in 2 subjects, General Certificate of Education at the advanced level in 2 subjects, General Certificate of Education at the advanced level in 2 subjects, General Certificate of Education at the AS level in 4 subjects, Technical or applied general qualification, at level 3 which meets or has previously met the requirements for 16 to 19 performance tables, QAA Access to Higher Education (HE) Diploma at level 3, Core maths qualification at level 3

Full or co-funding Indicator (FFI)	Indicates whether a learning aim is fully funded or co-funded in Adult Skills or Other Adult Funding.
Functional skills	Applied practical skills in English, maths and ICT that provide the learner with the essential knowledge, skills and understanding to enable them to operate effectively and independently in life and work.
Funding agreement	The agreement between the Secretary of State for Education acting through the West Midlands Combined Authority (WMCA) and providers who receive funding for education and skills training.
Funding model (11 and 38)	Identifies the funding methodology We apply to submission of finalised ILR data. For Skills Programmes funding, Funding Model 11 (Tailored Learning) and 38 (Adult Skills) are used, noting model 11 is non-formula funded (meaning ILR data does not generate a funding rate and is paid on monthly profile) and model 38 is formula funded. More information is available in the 2023 to 2024 ILR Specification .
Funding year	The ESFA's adult funding system operates on a funding year basis, which starts on 1 August and finishes on 31 July.
General Data Protection Regulation	The General Data Protection Regulation (GDPR) is a Europe-wide law that replaced the Data Protection Act 1998 in the UK. It is part of the wider package of reform to the data protection landscape that includes the Data Protection Act 2018. The GDPR sets out requirements for how organisations have to handle personal data.
Guided Learning	As defined by Ofqual: "The activity of the learner in being taught or instructed by – otherwise participating in education or training under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training. For these purposes, the activity of 'participating in education and training' shall be treated as including the activity of being assessed if the assessment takes place under the immediate guidance or supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training." You can find more information in the Ofqual Handbook
Hardship	Within learner support, a category of support to assist vulnerable and disadvantaged learners to remove barriers to education and training.
ILR specification	The ILR Specification is the technical documents, guidance, and requirements to help providers collect, return, and check ILR and other learner data.
Individualised learner record (ILR)	The primary data collection requested from learning providers for further education and work-based learning in England. The government uses this data to monitor policy implementation and the performance of the sector. It is also used by organisations that allocate funding for further education.
Job outcome payments	Payments made for learners who are unemployed at the start of learning who cease learning to take up a job or find work as part of our pre-employment programmes

Learner residency We use the term ‘resident’ or ‘residence’ in this document for different purposes. Residence in the UK, EU and EEA has specific definitions in education law, and this is set out in the ‘residency eligibility’ section. Following the devolution of adult education functions, there is a new emphasis on residence in England, in determining and evidencing eligibility for ESFA-funded AEB - see ‘who we fund’ and ‘evidence’ sections. This means the permanent residency of an individual in England (meaning, not a temporary address for duration of learning taking place), immediately prior to enrolment determines eligibility for WMCA funded AEB.

Learner support	Funding to enable providers to support learners with a specific financial hardship that might prevent them from being able to start or complete their learning.
Learning aim	Statements that describe the overarching intentions of a course.
Learning aim reference number	The unique eight-character code used to identify a specific learning aim.
Learning delivery monitoring (LDM)	A code used as part of the ILR to indicate participation in programmes or initiatives
Learning planned end date	The date entered onto the individualised learner record (ILR) when the learner is expected to complete their learning.
Learning support	Funding to enable providers to put in place a reasonable adjustment, set out in the Equality Act 2010, for learners with an identified learning difficulty and/or disability to achieve their learning goal.
Legal entitlement	The legal entitlement to education and training allows learners to be fully funded who are aged: 19 and over, who have not achieved a grade 4 (legacy grade C), or higher, and study for a qualification in English or maths up to and including level 2, and/or 19 to 23, if they study for a first qualification at level 2, and/or level 3 and 19 and over, who have digital skills assessed at below level 1.
Local flexibility	Regulated qualifications, and/or their components, and non-regulated learning that the ESFA funds, which is not part of the English and maths, or level 2 or level 3 legal entitlement offer. All regulated and non-regulated learning that is available for funding through the flexible local offer is listed on find a learning aim.
Low wage threshold	The threshold is £32,000 for the funding year 2024/25
Multiply	Multiply is the new adult numeracy programme being delivered, in 2022 to 2023 and 2024 to 2025.
Non-formula Tailored Learning funding	Where applicable, providers receive a non-formula-funded Tailored Learning allocation’ as part of their AEB which is paid on a monthly profile. Submission of ILR data does not generate a funding value for the learning aim/s a learner participates on. Instead, providers attribute costs up to the value of their non-formula Tailored Learning allocation. Providers submit Tailored Learning data through funding model 11.
Non-regulated learning	Learning which is not subject to awarding organisation external accreditation in the form of a regulated qualification. It may be designed, delivered, and certificated by a provider or another organisation. This could include - independent living skills and engagement learning, employability and work skills, labour market re-entry, technical education tasters, basic digital skills, Tailored Learning

Not in employment, education, and training (NEET)	A young person aged 16 to 24 who is no longer in the education system and who is not working or being trained for work
Occupational Standard	The requirements for competence in the duties of an occupation which are approved and published by the IATE. They include knowledge, skills, and behaviours.
Ofqual	The Office of Qualifications and Examinations Regulation, which regulates qualifications, examinations, and assessments in England.
Personal learning record (PLR)	A database that allows individual learners access to their past and current achievement records. These can be shared with schools, colleges, further education training providers, universities, or employers.
Recognising and Recording Progress and Achievement (RARPA)	The Learning and Work Institute have published updated RARPA guidance . This comprises a clear framework designed to support learners through the learning process, identifying key outcomes. It provides a robust approach to quality control and improvement of non-regulated provision with a focus on self-assessment that supports standards acceptable to the Office of Standards in Education (Ofsted). You can access further information from The Learning and Work Institute .
Recognition of prior learning (RPL)	An assessment method that considers whether a learner can demonstrate that they can - meet the outcomes for a qualification or a component of a qualification through knowledge, understanding, or skills they already have and so do not need to undertake a course of learning for that component or qualification
Regulated Qualifications Framework (RQF)	The RQF provides a way of understanding and describing the relative level and size of qualifications. The RQF, operated by Ofqual, is a single regulatory framework containing a range of general, technical, and professional qualifications
Residential Support	Support provided under learner support to learners receiving specialist provision, which involves a residential element, or to support learners who cannot receive provision locally.
Sector-based Work Academy Programme (SWAP)	Sector-based Work Academy Programme is a DWP scheme that offers Into-employment training, work experience placements and a guaranteed job interview for recipients of Jobseeker's Allowance (JSA), Universal Credit (all work-related requirements group) or Employment and Support Allowance.
Self-declaration	A process where the learner can confirm something through his or her own signature.
Senior responsible person	For example, chief executive, managing director, principal, or their equivalent.
Skills advisory panel (SAP)	SAPs aim to bring together local employers and skills providers to pool knowledge on skills and labour market needs, and to work together to understand and address key local challenges. This includes both immediate needs and challenges and looking at what is required to help local areas adapt to future labour market changes and to grasp future opportunities. This will help colleges, universities and other providers deliver the skills required by employers, now and in the future.
Skills Bootcamp	A skills bootcamp is a bespoke employer-led level 3 to 5 programme, designed to meet skills needs within the economy. Following a procurement process, the skills bootcamp programme began in August 2022.
Skills Programmes funding methodology	The funding methodology for individuals, aged 19 and over, participating in Skills Programmes learning. You can access AEB funding methodology on GOV.UK.

Start of learning	The date on which learning begins. We do not consider enrolment, induction, diagnostic assessment, or prior assessment to be part of learning.
State benefits	State benefits are contributions, both financial and non- financial, made by central and local government to individuals in certain circumstances to meet their day-to-day living needs
Supply chain	A separate legal entity that has an agreement with You to deliver any element of the education and training We fund. A separate legal entity includes companies in <u>Y</u> our group, other associated companies, and sole traders. It also includes individuals who are self-employed or supplied by an employment agency, unless those individuals are working under <u>Y</u> our direction and control, in the same way as <u>Y</u> our own employees
Take home pay	An unemployed learner may also receive an income alongside their benefit claim. In order to be fully funded under the unemployed definition their “take-home pay” (stated on the Universal Credit statement) is less than £892 a month (sole adult in their benefit claim) or less than £1437 a month (joint benefit claim with partner).
UK provider reference number	A unique identifying number given to all providers by the UK register of learning providers.
Unique learner number	A 10-digit number used to match a learner’s achievement to their personal learning record (PLR).
Virement	The process of moving money from one financial account or part of a budget to a different one.
Work placement/Experience	A placement/experience with an employer either in a workplace setting or simulated. Work placement/experience should give residents the opportunity to get hands on experience into what it would be like working in specific sectors and company.
Young people’s funding methodology	The funding methodology for individuals aged 16 to 19 (and those aged 19 to 24 with an EHC plan). You can access 16 to 19 funding methodology on GOV.UK.

Annex D – Relevant documents

[Performance & Management Rules](#)

[Skills Programme Coding Guidance](#)

[DfE Skills Bootcamps Guidance](#)

[Multiply Guidance](#)

[Financial Due Diligence and financial health monitoring](#)

[Privacy Notice](#)

[Whistleblowing process](#)

[Complaints process](#)

[Skills Programme Supply chain funding rules](#)

Issue date;	May 2024
Senior policy owner;	Miguel Silva
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