

Office for
Students

OfS

HESES22 training

Introduction to OfS funding and HESES22

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HESES22 webinars

More information available at www.officeforstudents.org.uk/events

Presented Live

- Essential updates for experienced staff: Tuesday 27 September 2022
- Categorising your students using HESES22 definitions: Thursday 29 September 2022
- Identifying and counting students to be included in HESES22: Thursday 6 October 2022

Pre-recorded

- Introduction to OfS funding and HESES22
- Submission and verification of HESES22 data return

Supporting materials

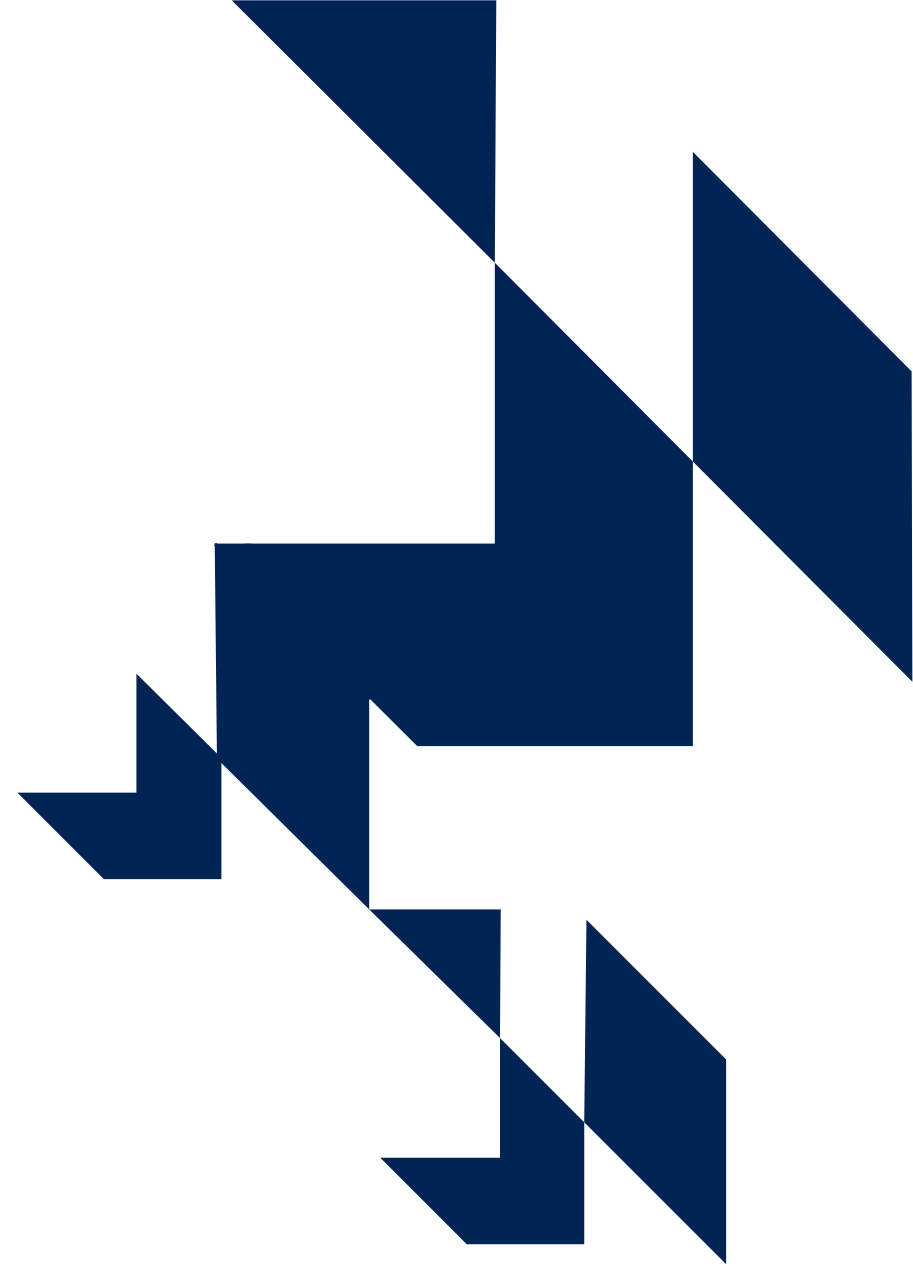
- Providers should also refer to www.officeforstudents.org.uk/heses
 - ‘HESES22 – Higher Education Students Early Statistics survey 2022-23’ publication
 - www.officeforstudents.org.uk/publications/heses22
 - ‘How to complete the HESES22 workbook’ publication
 - HESES videos on the OfS YouTube page: www.youtube.com/officeforstudents.
- Overview of OfS funding
 - ‘Guide to funding 2022-23’ publication – to be published in October
- Sign up for email alerts
 - www.officeforstudents.org.uk/sign-up-for-email-alerts

What we will cover today



- Introduction to OfS funding
- Student data and funding
- The Higher Education Students Early Statistics survey 2022-23 (HESES22)

Introduction to OfS funding



Who we are

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

OfS funding powers

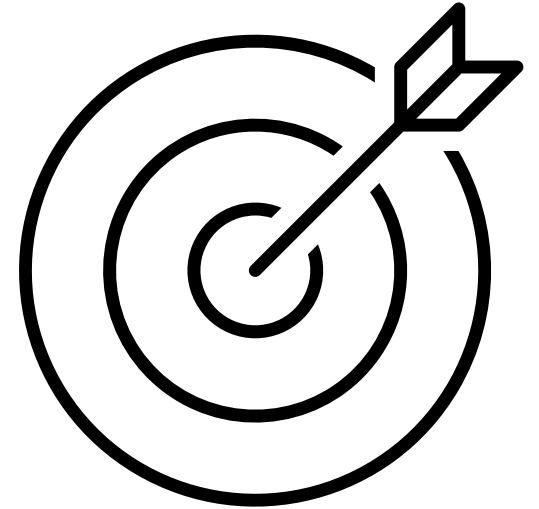
- We distribute government funding to providers
 - we do not fund students
 - we fund higher education activity at providers registered in the **Approved (fee cap)** category of the OfS Register
 - our allocations supplement the funds providers receive from student tuition fees
- Various criteria apply e.g. courses must meet our definition of higher education
- **Recurrent funding:** about £1.35 billion to more than 330 providers in the academic year 2022-23
- **Capital funding:** £450 million for financial years 2022-23 to 2024-25



OfS funding objectives

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

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

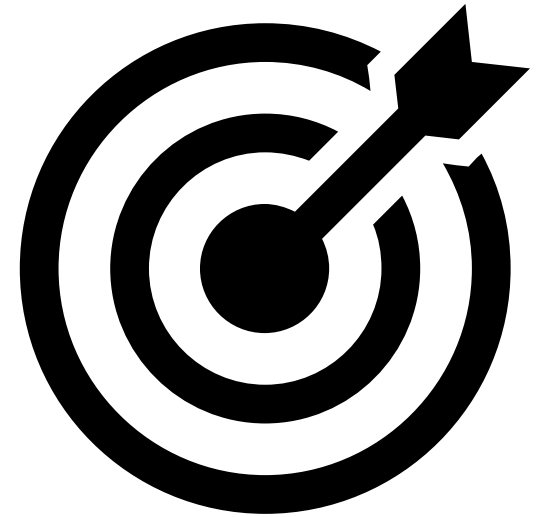


‘OfS Guide to funding’

OfS funding objectives

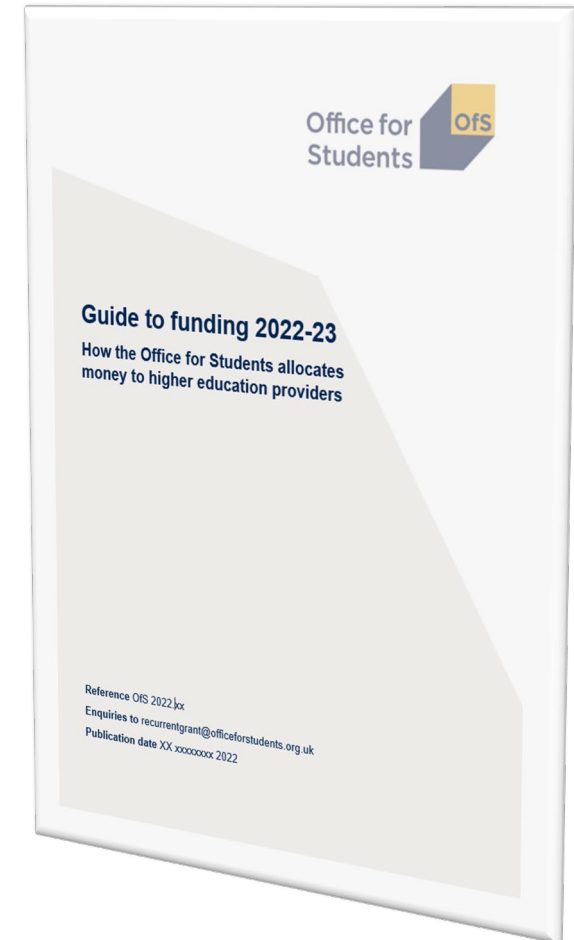
‘We want students from underrepresented groups and those with disabilities not only to access higher education, but also to achieve successful outcomes, including progression to postgraduate study.’

‘OfS Guide to funding’



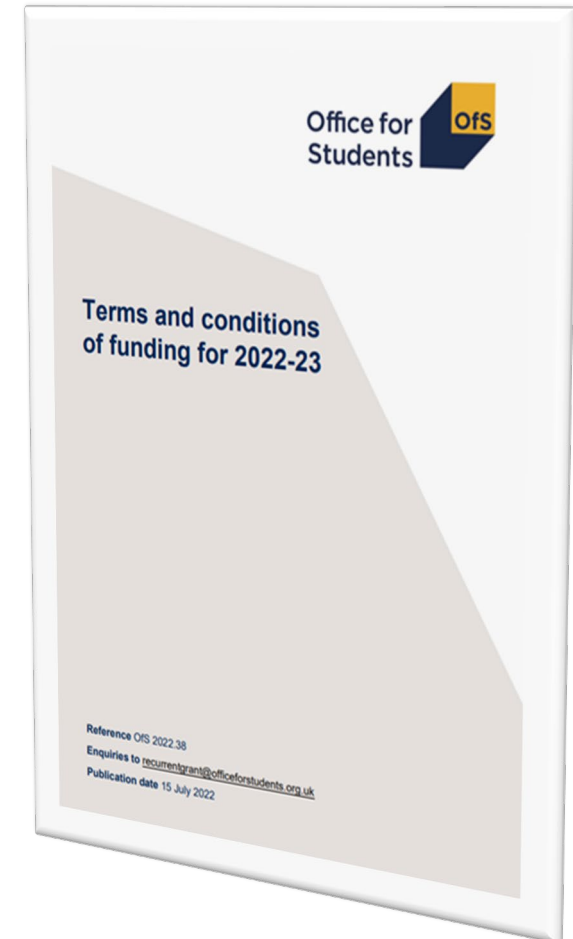
OfS funding model

- Recurrent funding - mostly allocated by formula
- Capital funding:
 - small formula-based allocation in 2022-23
 - bidding exercise covering 2022-23 to 2024-25
- Challenge Competitions
- Guide to funding - available from our website:
 - search for 'guide to funding'.



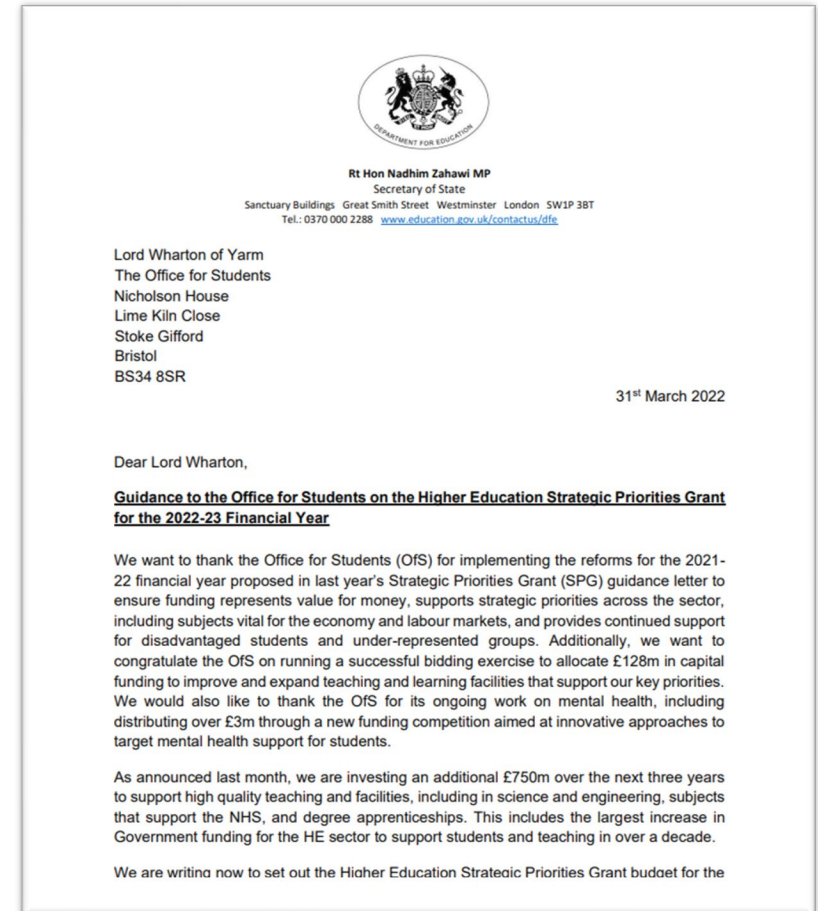
OfS funding terms and conditions

- Providers largely have autonomy on how they spend allocations (in terms of scope under HERA)
- But terms and conditions apply:
 - see OfS 2022.38 published on our website
- Some funds are earmarked for particular purposes e.g:
 - capital funding
 - student premium funding
 - hardship funding
 - very high-cost STEM subjects
 - funds allocated via Challenge Competitions.



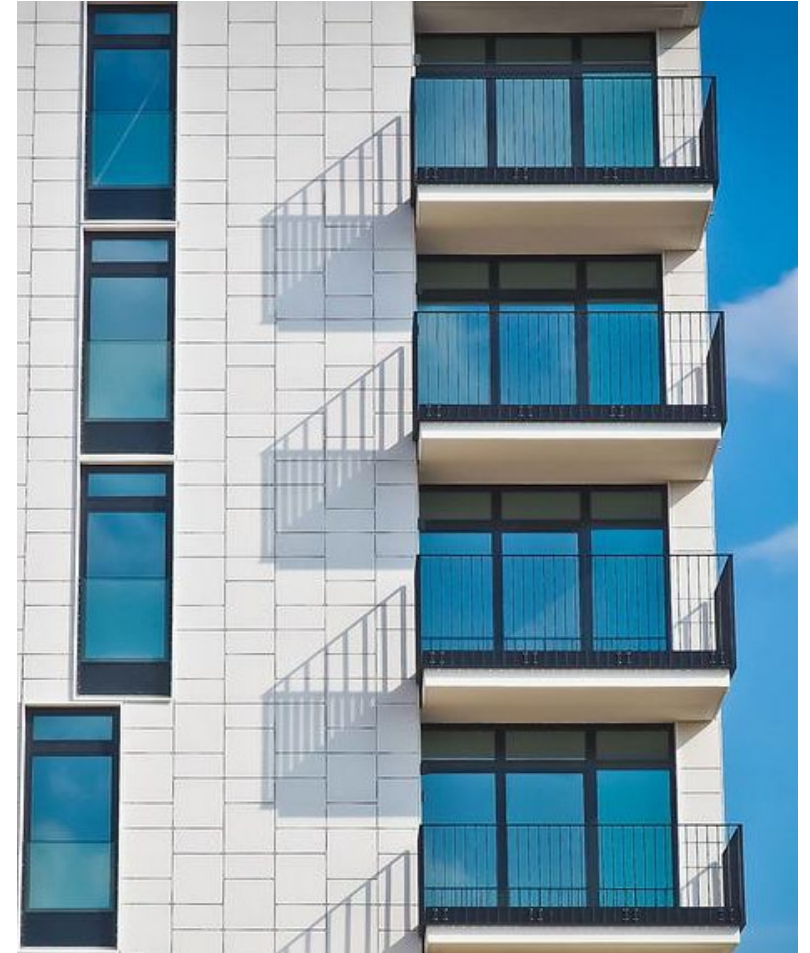
OfS funds

- Allocated annually in a **statutory guidance letter** from the Secretary of State for Education
 - www.officeforstudents.org.uk/advice-and-guidance/regulation/guidance-from-government/
- This details allocations for
 - recurrent funding
 - capital funding
- Contains **guidance** which the OfS must have regard to
- Nowadays, usually sent to the OfS in the first quarter of the **calendar** year.



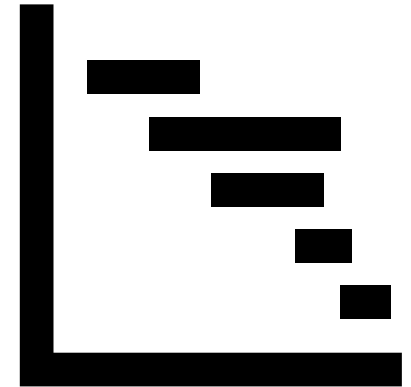
Capital funding

- Capital funding is allocated on a financial year basis i.e. April – March
- From the 2022-23 guidance letter:
 - £11 million for FY 2022-23 (distributed by formula)
 - £400 million for FY 2022-23 to FY 2024-25 (via a bidding exercise)
- Not all providers will get a formula capital allocation (a minimum threshold applies).



Recurrent funding

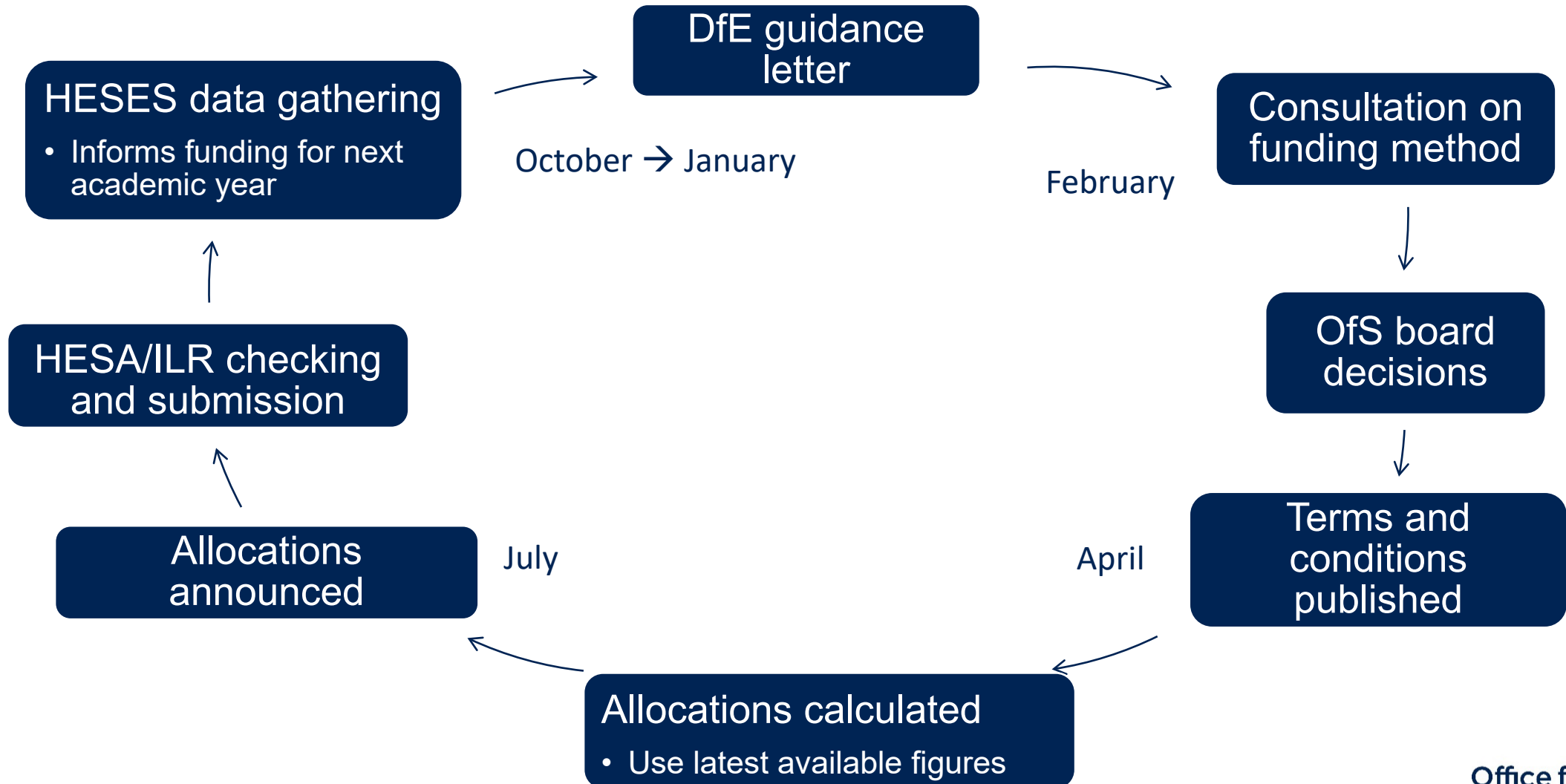
- We make decisions on our funding methods each year.
- Secretary of State's letter:
 - details funds available
 - may have guidance on policy which the OfS must have regard to
- We may need to consult on any substantial changes
- Department for Education can apply statutory conditions on our use of funding
- Terms and conditions published
- Calculation of grant allocations using **latest available** student numbers
- Recurrent allocations for 2022-23 academic year announced.



Elements of recurrent grant for 2022-23

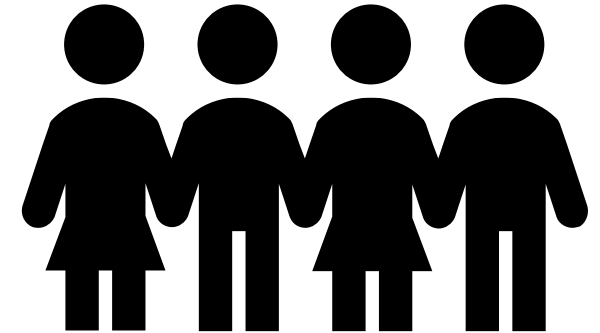
Elements of recurrent grant	Amount (£ million)
Funding for high-cost courses	974
Funding for student access and success	310
Funding for specialist providers	58
Funding set aside for emerging priorities	5
Total	1,347

Recurrent funding cycle – where we are now



OfS people – the funding team

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

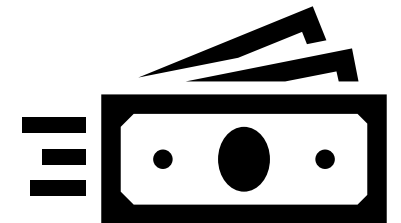
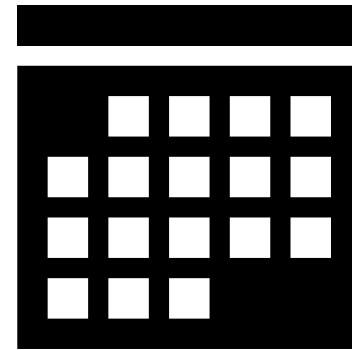


OfS funding team – administering the funding round

- Administer the funding round – determine amounts to be allocated to providers
 - Recurrent funding
 - count students studying at higher education providers (HESES)
 - apply formulae to allocate funds to those providers based on the count
 - Capital funding
 - calculate formula-based allocations
 - evaluate capital bids and allocate funds
 - Other funding streams e.g:
 - Challenge Competitions – usually bidding exercises for themed projects
 - Specialist institutions.

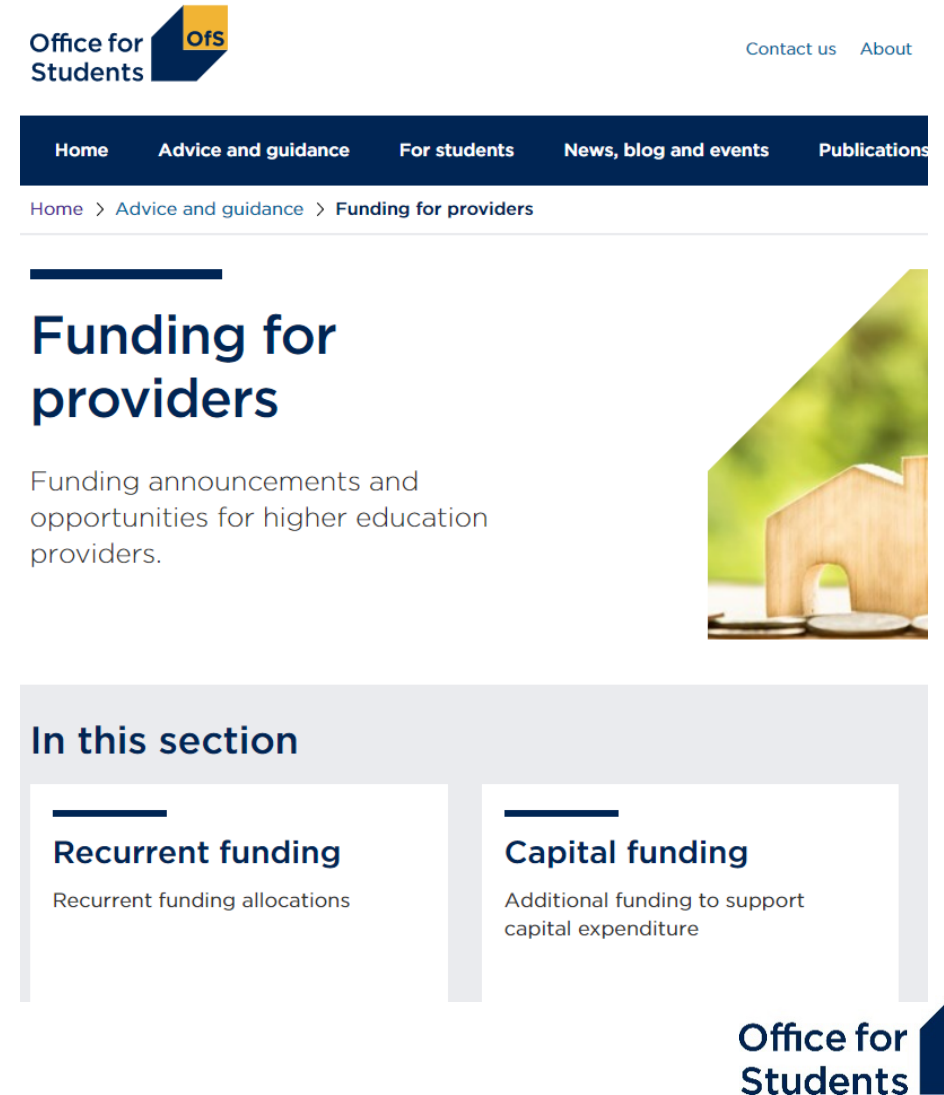
OfS people – the finance team

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



OfS funding – further reading

- The funding section of the OfS website
 - www.officeforstudents.org.uk/advice-and-guidance/funding-for-providers/
- Our ‘Guide to Funding 22-23’ – to be published in October 2022.



The screenshot shows the OfS website page for 'Funding for providers'. At the top left is the OfS logo (Office for Students) and at the top right are links for 'Contact us' and 'About'. A dark blue navigation bar contains links for 'Home', 'Advice and guidance', 'For students', 'News, blog and events', and 'Publications'. Below this is a breadcrumb trail: 'Home > Advice and guidance > Funding for providers'. The main heading is 'Funding for providers' in a large, bold font. Below the heading is a sub-heading: 'Funding announcements and opportunities for higher education providers.' To the right of this text is a photograph of a wooden house model on a stack of coins. Below the main heading is a section titled 'In this section' which contains two columns. The first column is titled 'Recurrent funding' and has the sub-text 'Recurrent funding allocations'. The second column is titled 'Capital funding' and has the sub-text 'Additional funding to support capital expenditure'. At the bottom right of the page is the OfS logo again.


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[Home](#) > [Advice and guidance](#) > [Funding for providers](#)

Funding for providers

Funding announcements and opportunities for higher education providers.



In this section

Recurrent funding

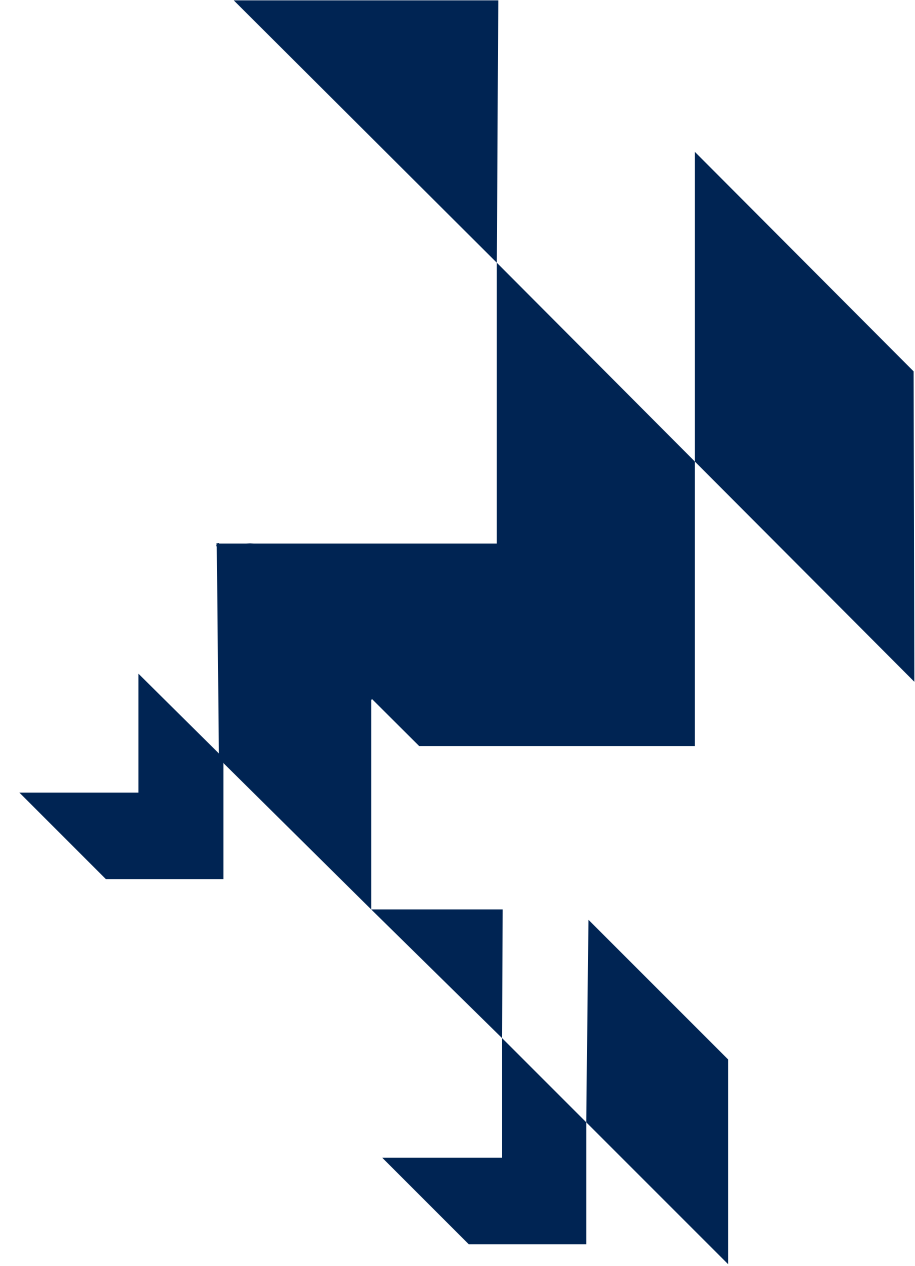
Recurrent funding allocations

Capital funding

Additional funding to support capital expenditure

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HESES22 student data and funding



Student data and funding – setting the scene

- Most of our funding is formulaic and informed by student data
- We fund teaching activity by using student data as a proxy measure
- HESES is the main aggregate data source
- HESES data for 2022-23 will inform funding for 2023-24
- We also use **individualised student data**
 - provides information on student characteristics
 - **Further Education Colleges (FECs)** – reported to the ESFA
 - **Others** – reported to HESA / the Designated Data Body
- Individualised data is for 2021-22 and before

Who completes what?

- **HESES** - Higher Education Students Early Statistics survey:
 - Completed by higher education providers:
 - **on the OfS Register** in the **Approved (fee cap)** category
 - have students registered with them for the **current academic year** (2022-23)
 - on courses that meet our definition of recognised higher education.
- **HESF** - Higher Education Students Forecast survey:
 - Same criteria as for HESES except for those that:
 - have no students in the current academic year
 - expect to teach students in the **following** academic year (2023-24)
- Providers only complete one of these surveys for any one academic year.

The HESES survey

- **HESES**: Higher Education Students Early Statistics
- Annual data return submitted to the OfS as an excel workbook
- Gives us an early indication of higher education students at a provider in the **current** academic year (2022-23)
- Used to inform allocation of funds for the **following** academic year (2023-24).
- Is used to report all of your higher education students in aggregate, categorised in particular ways.



The HESES workbook and how to get it



Welcome to the OfS portal

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

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

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

Login

Email

Password

Login

[Forgotten password?](#)

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

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

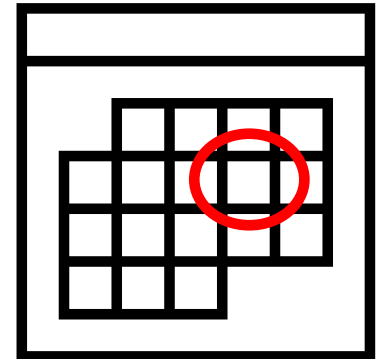
- The HESES survey is a Microsoft Excel Workbook
- **Available late October** from the OfS portal - we will email student data contacts when it's ready
- **Check your portal access** with your local portal administrator
 - See our video about the portal at www.officeforstudents.org.uk/heses
- See our accompanying video on submission, verification and sign-off of HESES22.

Completing HESES22

- What you need:
 - an understanding of the data you are being asked for i.e. HESES definitions
 - to identify and count students in these categories
 - how to submit your workbook, get it verified and then signed off
- Reflected in the forthcoming webinars:
 - 29 September: Categorising your students and understanding important definitions
 - 6 October: Identifying and counting students to be included in HESES22
- We have also released an additional video that covers submitting and verifying your HESES22 return.

HESES22 important dates

- Different for each type of provider:
 - further education and sixth form colleges and academies (FECs)
 - all other providers
- **Census date**
 - FECs: 1 November 2022
 - all others: 1 December 2022
- **Submission deadline** - a valid HESES22 workbook must be submitted through the OfS portal by **1200** on the submission deadline:
 - FECs: 10 November 2022
 - all others: 12 December 2022.



HESES22 - data verification and sign-off

- Data verification
 - please see pre-recorded video that covers this in more detail
 - runs from submission deadline to sign-off deadline
 - dialogue to ensure that we have the best possible picture of your provision
 - any changes to your submission needed can be made in this time
- **Sign-off deadline** (all providers)
 - 30 January 2023

HESES – further information and reading

- www.officeforstudents.org.uk/heses for information and resources:
 - **HESES guidance** document: www.officeforstudents.org.uk/publications/heses22
 - **Completing the HESES22 workbook** document
 - links to our YouTube videos
 - details and recordings of HESES webinars
 - training materials e.g. model workbook, webinar slides
- You can always contact the HESES team at the OfS:
 - heses@officeforstudents.org.uk.

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