



Skills Funding
Agency

Advanced learner loans prospectus 2017 to 2018: designating qualifications

Version 1.0

March 2017

Official – information for awarding organisations

Contents

Introduction	2
Going Forward	3
Which qualifications can be designated for loans	4
Overview	4
Qualifications that are automatically designated	4
Qualifications that you need to notify us about	5
Step 1 – is the qualification within the remit of loans?	5
Step 2 – does the qualification meet the size threshold for loans?	6
Step 3 – information about the qualification	9
Notifying us	10
Publishing the loans offer	11
Managing the loans offer	12

Introduction

1. This prospectus sets out how you (awarding organisations) can notify us of qualifications for the advanced learner loans (loans) offer for the 2017 to 2018 funding year. The 2017 to 2018 funding year runs from 1 August 2017 to 31 July 2018.
2. Loans are available for individuals to undertake designated qualifications with an eligible training organisation in England. Loans are available for individuals aged 19 or above when they start their qualification, for qualifications at levels 3 to 6. Learners aged 19 to 23 retain a legal entitlement to full funding for their first level 3 qualification.
3. Loans provide a source of fees support for learners, enabling them to reap the personal and financial benefits of their study, which in turn will support the economy. Payments are profiled across a learner's start and planned end dates and paid to the training organisation each month by the **Student Loans Company**.
4. For 2017 to 2018 we are changing the designation process to enable certain high level technical qualifications (at levels 4 to 6 only) that would have previously been below the size threshold of 150 guided learning hours (GLH) to be designated for loans. We say more about the criteria that we will apply to designate these qualifications in paragraphs 26 to 30.
5. This prospectus does **not** cover the following areas:
 - Adult education budget
 - Apprenticeships
 - Contracting: see the **Register of Training Organisations**
 - Learner eligibility and entitlement: see our **Funding Rules** and **Advanced Learner Loans Funding Rules 2017 to 2018**
 - How maximum loan amounts are set: see our **Maximum Loan Amounts for Advanced Learner Loans Designated Qualifications 2017 to 2018**

6. The loans process places the emphasis on you to notify us to add relevant qualifications to loans.
7. Where your qualifications are part of the loans offer, we expect you to publicly promote your qualifications to your centres and to prospective learners. This includes providing learners with accessible information about your qualifications and the outcomes they support, so that learners can make an informed choice. This can be through your website or through the centres offering your qualifications.
8. If you have any queries about this document or our process to designate qualifications for loans, please email the **Qualifications** inbox.

Going Forward

9. The **Post-16 Skills Plan** sets out further reform of the skills system; including the creation of 15 new technical education routes. These routes will encompass all employment-based (apprenticeships) and college-based technical education at levels 2 to 5.
10. From April 2018, subject to the will of Parliament, the Institute for Apprenticeships and Technical Education will also oversee college-based technical education, and maintain a register of approved technical qualifications that are eligible for loans. These approved qualifications will align with standards set by panels of professionals. During 2017 to 2018 we expect to say more about the implications of skills reforms and any timescales around transitioning to arrangements outlined in the Post-16 Skills Plan.

Which qualifications can be designated for loans

Overview

11. Qualifications that are designated for loans should deliver the right outcomes for learners, add value to an individual's professional development and be of benefit to the economy, in line with the aspirations set out in the **Building our Industrial Strategy: green paper**. To enable this, we will continue to focus the loans offer on technical qualifications that support clear routes into and through employment and progression to higher-level skills.

12. The (further education) qualifications in-scope for loans are those at:
 - levels 3 to 6 that are part of the Regulated Qualifications Framework (RQF) and offered by awarding organisations recognised by the Office of the Qualifications and Examinations Regulator (Ofqual)
 - level 3 that are Access to Higher Education (HE) diplomas and offered by organisations recognised as **Authorised Validating Agencies** by the Quality Assurance Agency (QAA)

13. Qualifications designated for loans are set a maximum loan amount in line with the methodology and matrix set out in the **Maximum Loan Amounts for Advanced Learner Loans Designated Qualifications 2017 to 2018**.

Qualifications that are automatically designated

14. We will automatically designate the following qualifications for the Loans offer:
 - QAA Access to HE diplomas
 - GCE A-levels and AS-levels
 - Tech level and applied general qualifications the Department for Education (DfE) recognises in its 2018 and 2019 **16 to 19 Performance Tables**

15. You do not need to notify us if you offer these qualifications and you want them in the loans offer.

16. If you have made a submission to DfE for its **16 to 19 Performance Tables** we will confirm the designation when this process completes.

Qualifications that you need to notify us about

17. You can ask us to designate a qualification on the RQF that is not automatically designated for loans, provided it has been designed to support one of the following outcomes:

- Progression to and through higher-level technical skills in the context of skilled employment. Qualifications that support progression must have a clear focus on a particular occupational area and be clear about how they support progression into that occupational area into and through skilled employment
- Direct entry to a specific job role
- Continuing professional development in an occupation
- Upskilling or reskilling in an occupational area

18. When we receive a notification for a qualification, we follow 3 steps to determine whether it should be designated for loans.

Step 1 – is the qualification within the remit of loans?

19. Regulated qualifications are in scope to be designated if they are:

- Available in England
- Available for learners aged 19 and over
- At levels 3 to 6
- Offered by awarding organisations that are recognised by Ofqual or QAA
- Offered by awarding organisations who regularly upload data to the personal learning record in line with the **Awarding Organisation Agreement**, including the learning records service data management policy

20. We will not accept a qualification that falls into one of the following categories:

- It is a licence to practise - where it is a legal (or statutory) requirement for all practitioners to obtain a licence which confirms the licence holder meets prescribed standards of competence, including situations in which it is unlawful to carry out a specified range of activities for pay without first having obtained a licence
- It provides the training to meet employers' legislative responsibilities such as health and safety, first aid or food safety
- It is part of **HE provision**, for example, a degree, a higher national qualification or a level 5 diploma in education and training
- It has been designed to be used as part of end-point assessment for an approved apprenticeship standard in England
- It is not subject to regulation by Ofqual or QAA
- It may be specific to one employer or may be a 'vendor qualification'

Step 2 – does the qualification meet the size threshold for loans?

21. Qualifications need to be over a size threshold to be designated for loans, so they can deliver meaningful learning to demonstrate the attainment of skills, knowledge and understanding. We will consider exceptions to this size threshold in order to enable certain qualifications at level 4 to 6 to be included in the loans offer. Paragraphs 26 to 30 provide further information on this.

22. For 2017 to 2018, the minimum size threshold for a new qualification to be designated for loans is 150 GLH.

23. We are no longer applying a credit threshold because of the introduction of the RQF. You can continue to submit credit-based qualifications to us to be designated for loans, but they must meet the 150 GLH threshold.

24. This will not affect qualifications which were designated for loans in 2016 to 2017 on the basis of their credit value. These qualifications remain in the loans offer for 2017 to 2018.

25. We will take the GLH you have stated for the qualification on **Ofqual's Register of Regulated Qualifications**. At the point of designation, we will take the most up-to-date entry you have made for the qualification's GLH.
26. For 2017 to 2018 we will consider an exception to the size threshold of 150 GLH, where the qualification meets all of the criteria below:
- a. It is at level 4, level 5 or level 6 – we will not consider exceptions at level 3
 - b. It is between 45 GLH to 149 GLH
 - c. It maps to one of the 15 technical routes – this is not a confirmation that a qualification will be included in a technical route being developed as part of the technical education reforms. From April 2018, subject to the will of Parliament, the Institute for Apprenticeships and Technical Education will be responsible for identifying which qualifications will be included on the register of approved technical qualifications and are eligible for loan funding, when the reforms are in place.
 - d. It is in a particular occupational area and supports one of the following outcomes:
 - It is a particular requirement for a specific occupation
 - It supports specialisation or the need to upskill within an established profession
 - It meets a specific higher level skills gap in a named occupational area
27. We will not consider as part of this exception process qualifications:
- a. which are smaller in size and share the content of an existing larger qualification already in the loans offer unless you intend to remove the larger qualification from the offer - where you intend to do this we will need you to provide the qualification details of the larger qualification

including the qualification reference and title so that this can be removed when the qualification below the size threshold is included

- b. whose sole purpose is to support progression to higher level education and which does not lead into skilled employment

28. For us to consider the qualification as an exception, you will need to provide some additional information in the notification form and provide a statement which explains and evidences all of the following:

- Which of the 15 technical routes the qualification aligns to
- Which standard occupational classification (SOC) or occupation the qualification maps to
- Which of the outcomes listed in paragraph 26, bullet (d) the qualification supports
- An explanation about how the qualification supports the outcomes listed in paragraph 26, bullet (d)
- Evidence that the qualification supports the outcomes that you have listed. We do not expect you to collect letters of support to meet this requirement but to use evidence that already exists. For example, you could provide:

- A link to a professional body website that references the qualification title at the level that you are submitting
- A selection of links to a job advert that reference the requirement of a particular qualification: you do not need to provide more than 10 examples
- A link to evidence that the qualification has been designed to respond to a higher level skills gap such as local skills strategy, a sector specific strategy or industry specific strategy

29. We also expect you to ensure that your approved centres have the necessary occupational capacity and capability, adequate resources, and the assessment

experience and expertise to deliver the qualification and have appropriate quality assurance processes and policies in place.

30. During 2017 to 2018 we will monitor the qualifications that are submitted as part of the exception process and their take-up by learners.

Step 3 – information about the qualification

31. To confirm the notification, in addition to the qualification specification, we will check that you have made information about the qualification and the expected learning outcomes available to learners who may be considering taking out a loan. This information should be clear, concise and accurate, so that the learner is able to identify why they should choose one qualification over another. To make sure this information is accessible and easy to understand, we recommend you write it in plain English.
32. When you notify us, please provide a hyperlink to where you publish this information online. We will make this link available through the learner-facing **Loans Catalogue**, and we will share it with the National Careers Service. The loans catalogue contains information on qualifications designated for 2017 to 2018.
33. We will not ask for evidence of recognition or endorsement, but it is beneficial for the learner to see a clear reference to any organisations that support the qualification. So you may wish to make learners aware if a qualification:
 - Will lead to professional body membership
 - Is endorsed by a major employer in that occupational area
 - Is recognised by an HE institution for progression purposes
34. The table below details the information you should include.

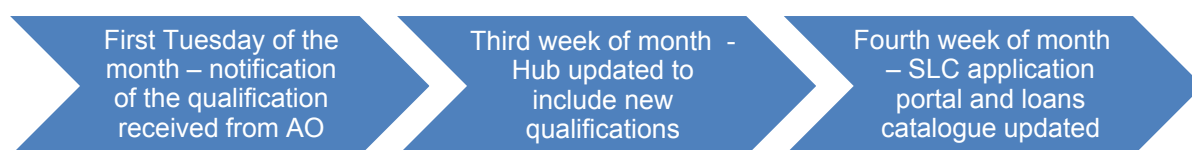
What to include	Value to learner
The qualification's content, structure and outcomes	They can see the knowledge, skills and competencies they will develop.

An explanation of how the qualification supports the identified outcome(s)	They can see the progression opportunities in the job role(s) or occupation and/or the subjects, qualifications and apprenticeships they can go on to study at the next level.
Comparison to similar qualifications you offer	They can decide which qualification is appropriate for them.
Other ways to achieve the same outcome	They can decide which route would be best for them, for example a qualification by taking out a loan or an apprenticeship.
Reference to organisations that support the qualification	They can see that the qualification will support their entry into HE, into employment or to gain membership status with professional bodies.
The UCAS points tariff the qualification attracts, if it has them	They can see how it will support a HE application.

Notifying us

35. You need to complete the **Notification form for Advanced Learner Loans** with all of the information we need and **email** it to us.

36. The loans process is monthly:



37. From April 2017, we will accept nominations for the 2017 to 2018 loans offer. Qualifications will need to meet the criteria set out in this prospectus including the GLH threshold of at least 150 GLH, unless you are notifying us of an exception between 45 GLH to 149 GLH at levels 4 to 6.

38. To make a nomination you must follow the instructions below and send us the form by **midnight** on the **first Tuesday of the month**:

- Use one form for all the qualifications you notify us of each month. You need to provide all the information requested. Without this information, we cannot confirm the qualification as part of the loans offer.
- Include a working hyperlink to the qualification information. This must be a link to the webpage where the information is available, not to a document.
- If the qualification is at level 4 or above and below the size threshold of 150 GLH, make sure you give us the **additional evidence** (please refer to **paragraph 28** above).
- Before you send the form, please check its contents are correct and that the qualification/s meet the requirements set out in this prospectus.
- If you submit your form before the deadline, you can amend it. Please indicate in your email if this replaces an earlier form.

39. We will only write to you if we need to clarify something or at the end of the process if we are not designating your qualification. If we do not designate a qualification, we will tell you why.

40. We will continue to accept nominations for the 2016 to 2017 loans offer until 2 May 2017. Qualifications nominated for 2016 to 2017 will need to meet the criteria set out in the **2016 to 2017 Advanced Learner Loans Prospectus**.

Publishing the loans offer

41. Once we designate a qualification, we will first add it to the **Hub** as part of the second update of the Hub in that month. You can see the update schedule for the Hub **here**. Once the Hub is updated we will transfer this information to the Student Loans Company as it uses this information to check learner eligibility for loans. We will then update the **Loans Catalogue** in the last week of the month.

42. In the learner-facing loans catalogue we will include the qualification's maximum loan amount and the link you have given to the qualification information.

43. You need to ensure that links for both new qualifications that you submit and those that are already designated for loans work. If you would like us to update a link already published in the loans catalogue, please use the **Notification form for Advanced Learner Loans**. Where a link is no longer working we will remove the link from the catalogue.
44. If we designate a qualification after 1 August, we will backdate its availability to 1 August or its operational start date if that is later.

Managing the loans offer

45. We will monitor changes to the size and sector subject area of qualifications. If you amend a qualification and it becomes ineligible, we will remove it from the loans catalogue. We will continue to support enrolled learners.
46. We will monitor changes to a qualification's operational end date to inform learners and training organisation of changes to the last date for enrolments.
47. Where a qualification is part of the 2016 to 2017 loans offer it continues to be available in the 2017 to 2018 loans offer as long as it does not have an operational end date on or before 31 July 2017 and is visible on Ofqual's Register of Regulated Qualifications.
48. If Ofqual takes **regulatory action** against an awarding organisation, we will review what action to take. We will do this on a case-by-case basis in respect of their qualifications approved for delivery.
49. We will monitor the take up of qualifications in the loans offer in order to make sure that the offer stays focused on high demand. This will include monitoring the take-up of those higher level technical qualifications we make available through the revised exceptions process.



© Crown copyright 2017

You may re-use this information (excluding logos) free of charge in any format or medium, under the terms of the Open Government Licence.

To view this licence,
visit <http://www.nationalarchives.gov.uk/doc/open-government-licence/>
or email: psi@nationalarchives.gsi.gov.uk.

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

This document is also available from our website: www.gov.uk/sfa.

If you have any enquiries regarding this publication or require an alternative format, please contact us: info@sfa.bis.gov.uk.