

Non-levy tender calculator

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LSECT
LEARNING & SKILLS
EVENTS, CONSULTANCY & TRAINING

ESFA's volume and values spreadsheet

The screenshot shows an Excel spreadsheet with the following structure:

- Header:** Invitation to Tender: Volumes and values spreadsheet - Apprenticeship training delivery for employers not using a digital account
- Sub-header:** August v1.2
- Section:** Proposal of funding volumes and values
- Form Fields:**
 - Organisation: [Text box]
 - UKPRN: [Text box]
- Table:**

[9] Apprenticeship Sector/Subject Area	Apprenticeship Starts		Estimated cost		Additional costs/support	
	[10] Estimated number of 16 to 18 starts	[11] Estimated number of 19+ starts	[12] Estimated cost of 16 to 18 delivery (excluding 10% employer contribution)	[13] Estimated cost of 19+ delivery (excluding 10% employer contribution)	[14] Additional costs/support for 16-18 year olds (refer to guidance tab)	[15] Additional costs/support for 19+ years (refer to guidance tab)
Accounting and Finance (Level 3 and below)						
Accounting and Finance (Level 4 and above)						
Administration (Level 3 and below)						
Administration (Level 4 and above)						
Agriculture (Level 3 and below)						
Agriculture (Level 4 and above)						
Animal Care and Veterinary Science (Level 3 and below)						
Animal Care and Veterinary Science (Level 4 and above)						
Anthropology (Level 3 and below)						
Anthropology (Level 4 and above)						
Archaeology and archaeological sciences (Level 3 and below)						
Archaeology and archaeological sciences (Level 4 and above)						
Architecture (Level 3 and below)						
Architecture (Level 4 and above)						
Building and Construction (Level 3 and below)						

The ESFA require applicants to complete their spreadsheet, which is attachment 4 in the ITT (downloaded from Bravo Solutions website)

Why a non-levy tender calculator is needed

The ESFA volume and value spreadsheet requires 16-18 and 19+ funding values (excluding employer co-investment) for apprenticeships, but only where generated between January 2018 and March 2019

It also wants these values to include 16-18 and 19+ ‘additional costs’, such as 16-18 employer and provider incentives, English and maths and the two types of framework uplifts for 16-18 and for disadvantage

My non-levy tender calculator enables the user to not only include all these elements, but most importantly it sums the funding up to March 2019 (automatically adjusting for duration and start month)

My non-levy calculator then tells you what value to put in the ESFA volume and value spreadsheet

Place these values into the ESFA volumes and values tender spreadsheet (from Bravo)

[9] Apprenticeship Sector/Subject Area	Apprenticeship Starts		Estimated cost		Additional costs/support	
	[10] Estimated number of 16 to 18 starts	[11] Estimated number of 19+ starts	[12] Estimated cost of 16 to 18 delivery (excluding 10% employer contribution)	[13] Estimated cost of 19+ delivery (excluding 10% employer contribution)	[14] Additional costs/support for 16-18 year olds	[15] Additional costs/support for 19+ years
Accounting and Finance	30	15	£28,044	£13,284	£52,335	£11,775

Note: If you plan to claim learning support then add this into additional costs section

How my non-levy calculator works

The user completes the blue cells, incorporating the funding rate, duration and number of starts each month. The calculator then does the rest (but all the figures and calculations can be seen, to give you confidence in how it is applying the calculations). For completeness, it also displays carry-over funding values (from April 2019 onwards)

Place these values into the ESFA volumes and values tender spreadsheet (from Bravo)

Apprenticeship Sector/Subject Area	[10] Estimated number of 16 to 19 starts	[11] Estimated number of 19+ starts	[12] Estimated cost of 16-19 delivery (including 10% employer contribution)	[13] Estimated cost of 19+ delivery (including 10% employer contribution)	[14] Additional carry-over support for 16-19 start	[15] Additional carry-over support for 19+ start
Accounting and Finance	30	15	425,044	415,214	452,335	491,719

Note: If you plan to claim learning support then add this into additional cost/section.

Monthly programme full funding	16-19 employer incentive	16-19 framework uplift	Completion full funding	ESFA carry-over investment programme
410	410	400	410	424

Apprenticeship framework title	Accounting framework at level 2
Framework F Standard J-S	7
Upper limit (max based info)	42,000
Overprice (max based support limit)	41,000
Over programme duration in month**	12

16-19 Math duration in month	16-19 English duration in month	19+ Math duration in month	19+ English duration in month
6	6	6	6

Additional payment for 16-19 deprivation	Percentage of deprivation	Funding
4000 (16+ start deprived area)	0%	40
4300 (19+ start deprived area)	0%	40
4200 (20+ start deprived area)	0%	40
40 (20+ start deprived area)	100%	40
Total	100%	40

Additional payment for 19+ deprivation	Percentage of deprivation	Funding
4000 (19+ start deprived area)	0%	40
4300 (20+ start deprived area)	0%	40
40 (20+ start deprived area)	100%	40
Total	100%	40

Additional payment for math and English	Starts	Funding
16-19 math	15	45,310
16-19 English	15	45,310
19+ math	15	45,310
19+ English	15	45,310

	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Total	
a) 16-19 starts (under 50 employees)*	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	15
b) 16-19 starts (50+ employees)*	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	15
16-19 starts total	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	30
of which 16-19 Math starts	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	15
of which 16-19 English starts	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	15

c) 19+ starts total	of which 19+ Math starts	of which 19+ English starts
1	1	1
1	1	1

Total starts all esp	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Total for 18 months
3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	45

Note: This calculation assumes 100% completion

	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Total for 18 months
Total 16-19 starts	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	30
Total 16-19 *estimated cost*	4220	4495	4584	4912	41,140	41,340	41,596	41,824	42,092	42,280	42,508	42,736	43,420	43,420	43,420	425,044
Total 19+ starts	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	15
Total 19+ *estimated cost*	4100	4216	4324	4402	4540	4640	4784	4914	4972	41,000	41,100	41,296	41,620	41,620	41,620	415,214
Total all esp starts	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	45
Total all esp *estimated cost*	4236	4672	45,099	41,244	41,690	42,016	42,352	42,810	42,324	42,360	42,596	44,032	45,040	45,040	45,040	441,229

	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Total for 18 months
a) On programme	410	4240	4360	4480	4600	4720	4840	4960	41,000	41,200	41,400	41,600	41,440	41,440	41,440	417,000
b) On programme	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	41,000
c) On programme	410	4216	4324	4402	4540	4640	4784	4914	4972	41,000	41,100	41,296	41,296	41,296	41,296	412,312
16-19 employer incentive	40	40	41,000	41,000	41,000	41,000	41,000	41,000	41,000	41,000	41,000	42,000	42,000	42,000	42,000	417,000
16-19 framework uplift programme	453	497	460	425	425	423	427	440	433	487	440	440	440	440	440	46,000
Total (including Esp, math and deprivation)	4389	4729	43,464	43,557	43,747	44,236	44,725	45,315	45,504	45,893	46,283	46,472	45,840	45,840	45,840	481,888

There are no vlookups, pivot tables nor drop-down menus. Primarily it's a lot of IF statements allowing for funding adjustments based on duration and start month

How to get a copy of the calculator

The calculator is free to Lsect Gold Members (within the resources page)

If you are not an Lsect Gold Member, you can register online and you will be sent a copy of the calculator if you select the invoice option. If you select the payment online option you will automatically be able to download it from the resources page.

Gold Membership is £295 + VAT for a year, but includes all these benefits:

- > Subscription to the print and digital edition of FE Week
- > £50 off Nick's funding workshops
- > Access to the slides from all of Nick's workshops
- > **A copy of the non-levy tender calculator**
- > Monthly funding clinic webinars from September 2017 (dates to be announced)
- > Exclusive super reduced ticket price to the Annual Apprenticeship Conference in March 2018.
Full conference tickets (3 days) are usually £825 + VAT. Gold Member rate = £395 + VAT

So get instant access to the non-levy tender calculator
from the 'Gold member area' on www.lsect.co.uk

For a speedy reply, if you have any questions about the non-levy tender calculator, please email gemma.gathercole@lsect.com

Get instant access to the non-levy tender calculator from the 'Gold member area' on www.lsect.co.uk

And see a repeat demo on my webinar at 11am on Thursday 31 August. Register via www.lsect.co.uk

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