



National College for  
Teaching & Leadership

# **Initial teacher training (ITT) Training bursary guide**

**Academic Year 2014 to 2015 (Version 1.4)**

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# Section 1 – Introduction and overview

## Introduction

- 1.1 This guide is for the operational delivery of training bursaries for Initial Teacher Training (ITT) providers, schools participating in School Direct (tuition fee) programme and as a source of reference for trainees. This is a live document dated June 2014. The information, training bursary rates, qualifying subjects and associated degree classifications contained within this document is relevant for trainees commencing ITT in academic year (AY) 2014/15 only.
- 1.2 Changes may be made to the guidance and requirements contained within this document. When this happens a new version of this document will be issued and will supersede this version. Any such changes will be communicated to schools and ITT providers.
- 1.3 Any changes made will be logged in the change log at the back of the manual.

## Overview

- 1.4 The training bursary is a financial incentive to attract and retain high quality graduates into the teaching profession. Bursary levels will vary according to the degree classification held by the trainee and the subject specialism in which they wish to train to teach. Depending on the subject, a trainee's A level grade may impact upon bursary eligibility and level. Trainees must have at least a 2:2 to access a bursary in most shortage subjects, and at least a 2:1 for non-shortage subjects.
- 1.5 The ITT training bursary scheme has been designed to acknowledge the academic achievements of the trainee and their potential to teach, with the top tier of the bursary payments aligned with trainees with 1st class degrees, the second tier aligned with 2:1 degrees and the third tier aligned with 2:2 degrees. There is also a new fourth tier which relates to physics and maths candidates only. Figure 1 in Section 2 provides an overview of the financial incentives and eligibility criteria for trainees. The eligible bursary awards and levels are outlined in Section 2 of this guide.
- 1.6 The scheme allows for the award of **core** and **discretionary** bursaries.
- 1.7 Core bursaries are mostly awarded to trainees who have the minimum 2:2 requirement but are also awarded to trainees who hold other relevant academic qualifications such as Masters, PhDs, overseas and medical degrees.

- 1.8 Discretionary bursaries are awarded to trainees who have more experience and potential than their degree class would suggest. These discretionary awards will be limited and auditable. More information can be found in Section 3 of this guide.
- 1.9 There is also a Scholarships Programme which has been expanded with more Scholarships available in Physics, Chemistry, Mathematics and Computing. Trainees possessing a 2:1 or above are eligible to apply for their scholarships.
- 1.10 NCTL also pay bursaries for some Subject Knowledge Enhancement (SKE) courses. SKE courses are pre-initial teacher training courses designed to help potential trainees gain the depth of knowledge needed to train to teach their chosen subject. Further information regarding SKE can be found on the [NCTL funding webpage](#).

## Section 2 - Core bursary award and eligibility

### Eligibility

- 2.1 The bursary level and award is dependent on the subject in which a trainee wishes to teach and the outcome of their highest qualification, not the subject of their academic qualification. For instance, a trainee with a 1st class degree in geography will be eligible for the top tier of bursary if they are undertaking physics ITT. This does not change the process of selection or recruitment that the provider would go through, including making judgements about the relevance of the degree to the subject of training.
- 2.2 The bursary award is fixed for the duration of the trainee's ITT programme and will not vary according to the length or mode of the programme.
- 2.3 The bursaries are not only a financial incentive to encourage high quality graduates into ITT, but should be allocated for the purpose of encouraging successful retention and completion of the course. The payment mechanisms for bursaries can be found in Section 12: Bursary and Scholarship payments of this guide.
- 2.4 Figure 1 sets out the bursary rates for AY 2014/15. These are relevant to AY2014/15 only and do not provide assurances about any future bursary rates. We advise against ITT providers giving assurance to potential trainees on future AY training bursary rates until these are released by the Department for Education.

### Eligible ITT subjects

#### High priority subjects

- 2.5 Chemistry, languages, computing and primary maths specialists will attract a bursary if the trainee has a 2:2 degree or above. The bursary levels will vary depending on the trainee's degree classification and subject, as shown in Figure 1 below.
- 2.6 Trainee teachers in maths and physics with a relevant degree subject and at least a B at A level or equivalent in maths, further maths or physics will be eligible for a bursary of £9,000. Trainees will not be entitled to this bursary if they are also entitled to a higher bursary based on their degree class.
- 2.7 A scholarship award of £25,000 for those trainees possessing a 2:2 or above is available in physics, chemistry, mathematics and computing.
- 2.8 If 'classics' is used to refer to a course that is mainly about ancient languages rather than classical civilisation, it will be considered eligible for the languages bursary. If 'classics' is used to refer to a course that is mainly ancient history, it will be

considered as ‘classics’ and fall into the ‘other priority subjects category’ (see below).

### Other priority subjects

2.9 Biology, English, geography, history, music, classics, design and technology and primary will attract a bursary if the trainee has at least a 2:1 degree. There will be no bursary for trainees with 2:2 degrees in these subjects.

### Primary maths specialist

2.10 The primary maths specialist bursary is available to trainees with a B or above at maths A level (or equivalent to) on primary maths specialist courses only. Those who do not have a B or higher at maths A level, or those who train on general primary courses, will receive the normal primary bursary for their degree class.

### Troops to Teach

2.11 Eligible graduate Service Leavers will receive £2,000 bursary uplift, if they are already entitled to a bursary payment. Service leavers should provide an MOD Certificate of Service (CoS). The CoS is printed on security watermarked light card and is embossed with a hologram depicting the MOD crest.

### Non-eligible ITT subjects

2.12 All other ITT courses will not attract any bursary, regardless of a trainee’s degree class. A full breakdown of eligible subjects can be found in Annex A. Details of which academic qualifications are linked to the relevant bursary levels are given in Section 4.

Figure 1: Financial incentives for those who train in AY 2014/15

Bursary Tier	Training Bursary 2014/15 <sup>1</sup>	High priority subjects				Other priority subjects	Primary Maths Specialists <sup>6</sup>
		Physics, Maths <sup>3</sup>	Computing	Chemistry	Languages <sup>4</sup>	Secondary, Primary <sup>5</sup>	
	Scholarship <sup>2</sup>	£25,000	£25,000	£25,000	-	-	-
1	First*	£20,000	£20,000	£20,000	£20,000	£9,000	£11,000
2	2:1*	£20,000	£20,000	£15,000	£15,000	£4,000	£11,000
3	2:2*	£15,000	£15,000	£12,000	£12,000	ineligible	£6,000
4	Other <sup>3</sup>	£9,000	ineligible	ineligible	ineligible	ineligible	ineligible

\*Or equivalent as set out in equivalence data in Section 4 and 5



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Notes:

- <sup>1</sup>School Direct trainees who spend more than 60 days training in a school (or schools) where more than 35 per cent of pupils are eligible for free school meals will receive a 25 per cent increase on the above bursaries/scholarships. A list taken from January 2013 school census detailing schools and their percentage of FSM is available on our website.
- <sup>2</sup>Trainee teachers in maths, physics, chemistry and computing with a 2:1 or first are able to apply for scholarships with the relevant subject association group. Applicants for the scholarships will be subject to a competitive process. Trainees who hold the scholarship will not also be eligible for the standard Department for Education (DfE) bursary. Trainees who are not awarded a scholarship will continue to be eligible for the standard bursaries in 2014/15.
- <sup>3</sup>Trainee teachers in maths and physics with a relevant degree and at least a B at A level or equivalent in maths, further maths or physics will be eligible for a bursary of £9,000. Trainees will not be entitled to this bursary if they are also entitled to a higher bursary based on degree class.
- <sup>4</sup>Languages include any modern language and classics with a languages bias such as Latin or Greek. Classics with a languages bias such as Latin or Greek will receive a bursary under the Languages heading.
- <sup>5</sup>Other priority secondary includes English, history, biology, geography, music, design and technology, and other classics courses such as ancient history.
- <sup>6</sup>Available to trainees with a B or better at maths A level or equivalent on primary maths specialist courses only. Those who do not have a B or higher at maths A level, or those who train on general primary courses, will receive the normal primary bursary for their degree class.

**A full list of allocated subjects and NCTL funding can be found in Annex A.**

## Section 3 - Discretionary bursary award and eligibility

- 3.1 The Secretary of State for Education announced in the [ITT implementation plan](#), published in November 2011, that ITT providers will be able to award higher bursary awards than a trainee's degree class would allow if they have outstanding potential. All ITT providers will be allocated a small limited uplift, approximately 3 per cent of their total bursary funding in addition to their core bursary allocation, to award these discretionary higher bursaries to eligible trainees.

### How to use the discretionary bursary fund

- 3.2 Use of the discretionary bursary fund is restricted to trainees in tiers 2, 3 and 4 only, see Figure 1 in Section 2. The discretionary bursary cannot be used to augment bursary payments to trainees who are already eligible for the top bursary level. ITT providers with a small core bursary allocation will be protected so they are able to award at least one discretionary bursary at a higher level. The discretionary bursary fund is restricted to trainees in tier 4 who will be training in maths and physics only.
- 3.3 The discretionary bursary uplifts should only be made in line with the current bursary rates. Trainees can only move up 1 funding tier. For example an English trainee with a 2:1 granted the discretionary bursary would receive and uplift from £4,000 to £9,000 only. ITT providers are encouraged to contact the funding team at [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk) should they have any questions regarding the discretionary bursary uplifts.
- 3.4 ITT providers are expected to use this fund as a discretionary incentive for career changers or those from a professional background who possess extensive subject-related industry experience, acquired either through their career, or through accredited further study. The fund is expected to be used as an incentive for high quality prospective candidates to join the teaching profession and not as an incentive for satisfactory applicants to take up a place. Discretionary awards should only be made at the point of offering a place to the trainee. They cannot be awarded after the ITT year has commenced; any such award will be recovered from you in full.
- 3.5 Use of this fund is restricted to trainees who are eligible for a bursary including trainees whose overseas degrees sit below second class honours as supported by the data in the [Overseas Equivalence Data](#) document. See Section 4 Assessing UK Academic Qualifications for more assistance on assessing academic qualifications for eligibility.
- 3.6 For trainees with overseas degrees that have been confirmed as equivalent to at least 2nd class honours or above, or can be compared to a UK Master's or Doctoral degree as supported by a statement of comparability, these trainees should be

eligible for the core bursary payments and therefore funded from a provider's core bursary allocation.

- 3.7 For trainees in Maths and Physics who hold overseas degrees that are not deemed equivalent to 2nd class honours or above, ITT providers are able to award a core bursary at tier 4 providing that they are satisfied that the A level equivalent requirement is fully met.
- 3.8 ITT providers wishing to award a higher bursary to trainees who have qualifications, whose level cannot be verified with the support of the data in the [Overseas Equivalence Data](#) document, or the [Framework for Higher Education Qualifications](#) in England, Wales and Northern Ireland (FHEQ) are asked to contact the Funding team [FA.team@education.gsi.gov.uk](mailto:FA.team@education.gsi.gov.uk) to discuss in the first instance.

#### Eligibility criteria

- 3.9 The discretionary bursary fund can only be used for bursaries in eligible ITT subjects set out in Section 2 and in Annex A. The uplift to award discretionary bursaries is fixed and will not be increased upon request. It is ring-fenced solely for the purpose of awarding higher bursary awards to candidates with outstanding potential and ITT providers may not use their core bursary allocation for this purpose. Unused discretionary bursary funding will be clawed back from the provider along with other unused bursary funds once expenditure has been identified through the audit grant process for AY2014/15. Details of the awards made will be requested via the Census collection in October 2014, and through the audit process.
- 3.10 ITT providers may not use their discretionary bursary fund to upgrade the status of a degree or equivalent just so the trainee is awarded a bursary.
- 3.11 In all subjects except physics and maths, ITT providers who have made core or discretionary payments to trainees holding Ordinary degrees, or degrees which sit below Bachelor's level, may lose their entitlement to award discretionary bursary payments in future academic years. The National College for Teaching and Learning (NCTL) is unable to fund bursary payments that have been made to trainees in error.

### How to record a discretionary bursary award

- 3.12 Once the decision has been made and the audit trail has been gathered to demonstrate the trainee satisfies the eligibility criteria the provider must then record them in the October Census. If you have identified a trainee you wish to award a discretionary bursary to, you must record this in line with the census guidance which will be issued at the start of the AY.

## **Discretionary bursary evaluation project**

3.13 ITT providers may be expected to take part in an evaluation project to establish whether the discretionary bursary fund has been effective in incentivising high-quality trainees to take up an ITT place. The NCTL will write to all ITT providers with details of the evaluation project.

## Section 4 - Assessing UK academic qualifications

### Honours and ordinary bachelor's degrees

- 4.1 The [Framework for Higher Education Qualifications in England, Wales and Northern Ireland](#) (FHEQ), maintained by the Quality and Assurance Agency for Higher Education (QAA), sets out that someone who holds a Bachelor's degree with honours will have “developed an understanding of a complex body of knowledge, some of it at the current boundaries of an academic discipline”. In addition, holders of this award “will be able to evaluate evidence, arguments and assumptions, to reach sound judgements and to communicate them effectively.” (Quality and Assurance Agency for Higher Education, 2008). Honours degree holders will usually have completed an independent dissertation or thesis relating to the subject in which they are specialising and will have undertaken considerably less contact hours than an ordinary degree. The length of study for a full-time Bachelor's degree with honours usually equates to three years; longer for the part-time equivalent. Honours degrees require 360 credits for completion.
- 4.2 Ordinary Bachelor's degrees are largely taught degree programmes, with less specialisation or independent study involved and the outcome can sometimes be a licence to train in a particular subject, such as accounting. A trainee may sometimes be transferred from an honours programme onto an Ordinary degree programme if they have not achieved the required grades throughout the programme to graduate with honours. Open Degrees from the Open University awarded *without honours*, would fall into this category and would not be eligible for bursaries in their own right. Trainees may be able to study a further 60 credit module to convert these degrees to honours, but this may not necessarily uplift the trainee's final classification to at least 2:2, which is necessary for bursary eligibility. Trainees in this position are advised to contact the Open University for advice.

### Medical first degrees

- 4.3 First degrees in medicine which are qualifying awards in professional terms are not classified. Although usually entitled 'Bachelor', they are at level 7 (Master's level) on the FHEQ. However, this will apply only to degrees that are 5 years in length. Trainees holding these 5-year degrees in Medicine, Dentistry, Veterinary Science and Surgery can be awarded the Tier 2 or 2:1 level of bursary for the subject in which they wish to train to teach. These degrees can be funded from a provider's core bursary allocation. Trainees who hold a 1st or distinction in an integrated masters medical degree will be entitled to the Tier 1 bursary.
- 4.4 However, there are also medical Bachelor's degrees which may be awarded as exit awards to students who satisfy the criteria specified but fail to meet the criteria for

progression to the fourth or fifth year of the qualifying medical degree. These are often called Bachelor’s of Medical Science (B Med Sci). Trainees holding these degrees can be awarded the Tier 3 or 2:2 level of bursary for the subject in which they will train to teach. These can also be awarded from a provider’s core bursary allocation.

- 4.5 As a number of award titles may be used in both categories of award, ITT providers are advised to check individual instances with the relevant awarding bodies before making a decision about awarding bursaries.
- 4.6 Trainees who hold medical degrees may also be eligible for discretionary bursary funding, and the same criteria will apply as with other eligible degrees. Please contact the Funding team if you have any queries, at:  
[FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk).

## List of eligible academic qualifications

- 4.7 One of the conditions for receiving the bursary is that the trainee holds a UK degree or equivalent, with at least 2nd class honours. However, for the purposes of determining the bursary award, ITT providers should take the trainee’s highest academic qualification that aligns with a bursary tier. Figure 4 sets out the eligible academic qualifications and equivalent bursary award.

Figure 2: Higher qualifications and bursary tier eligibility

Highest qualification	1 <sup>st</sup> (top) Tier 1	2:1 tier 2	2:2 tier 3	Good A level and relevant degree (maths and physics only) Tier 4
PhD <sup>7</sup>	X			
1 <sup>st</sup> class honours degree <sup>8</sup>	X			
Medical Masters (distinction)	X			
Masters <sup>9</sup>		X		

2:1 honours degree*		X		
2:2 honours degree*			X	
3 <sup>rd</sup> class honours degree				X
Aegrotat				X
Ordinary degree				X
No first degree				X

7. Honorary doctoral degrees are not recognised by QAA as academic qualifications.

8. May include Integrated Masters, please refer to section 4.12

9. These do not include the MA granted on application by the University of Oxford or Cambridge. Please see Section 4 for more details.

\* or equivalent, supported by the data in the [Overseas Equivalence Data](#) document.

4.8 Aegrotats are degrees awarded if a trainee was unable to sit their final exams due to illness and are not eligible for the bursary in their own right. Non-honours and Ordinary degrees are also ineligible for the bursary in their own right. Trainees who do not hold a first degree or equivalent at second class honours or above will not be eligible for a bursary in principle unless they have an eligible relevant higher academic qualification, as set out in Figure 2. Trainees who do not hold a first degree or equivalent of at least second class honours, but hold a postgraduate certificate (PGCert) or diploma (PGDip) as their highest qualification will not be eligible for a bursary.

## PhD and masters qualifications

4.9 PhD and Masters-level qualifications may include other UK qualifications deemed by the provider to have the same level of academic breadth and depth. These qualifications should be funded from a provider's core bursary allocation.

4.10 If a provider is using a higher academic award, i.e. PhD or Masters, to uplift the bursary entitlement they must seek confirmation that the qualification was completed prior to the commencement of the QTS. If the outcome is not yet known, the bursary award must be made based on the highest relevant academic award on the date the QTS started. If the trainee successfully gains the higher award a retrospective uplift can be applied. In these circumstances please contact the Funding Team for further information at: [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk).

## Master's degrees

4.11 The [FHEQ](#) describes Master's degrees as separate from other postgraduate qualifications in their "increased intensity, complexity and density of study." (Quality and Assurance Agency for Higher Education, 2008). Masters degrees are awarded after the completion of taught courses, programmes of research or a mixture of both and the FHEQ's descriptor for Master's degrees states that they "typically include planned intellectual progression that often includes a synoptic/research or scholarly activity." The level of study associated with a Masters degree should typically equate to one calendar year full-time. These do not include the Master of Arts (MA) which are granted, on application, by Oxford, and the University of Cambridge, to graduates of these universities with a Bachelor of Arts (BA).<sup>1</sup> Master's degrees which are offered as part of a trainee's route to QTS, will not count for the purposes of assessing eligibility.

## Integrated master's degrees

4.12 Integrated Master's degrees are undergraduate programmes extended by one year to enable students to reach Master's level. Providing they have reached a suitable standard of achievement after three years of Bachelor's level-study, students can study for a fourth year for a Master's degree where the academic level of work in the fourth year is at Master's rather than at Bachelor's level. These programmes are normally found in science and engineering academic disciplines, and the usual degree awarded is MEng or a named integrated Master's degree such as MPhys (Masters of Physics) or MChem (Masters of Chemistry). Completed Integrated Master's degrees are equivalent to Level 7 (Master's degree) on the FHEQ and trainees who have achieved a distinction are eligible to receive the top tier bursary. Trainees who took an Integrated Masters but didn't have a degree classification or pass/merit distinction, they can be considered for the higher bursary, but the provider will have to be required to demonstrate that the trainee is of high quality. Trainees that did not complete the final year can be awarded a bursary based on their final degree classification on exit and the subject in which they train to teach.

## Doctoral degrees

4.13 The FHEQ's descriptor of Doctoral degrees sets out that they are awarded for the "creation and interpretation, construction and/or exposition of knowledge which

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<sup>1</sup> The MA is normally granted, on application, to graduates of these universities with a Bachelor of Arts (BA). No further assessment or study is needed but the recipient may pay a fee. At the University of Oxford, the MA may be granted during or after the twenty-first term from matriculation and at the University of Cambridge, the MA may be granted six years after the end of the first term.



extends the forefront of a discipline, usually through original research.” (Quality and Assurance Agency for Higher Education, 2008). Professional doctoral programmes that may include a research component, but which have a substantial taught element lead usually to awards which include the name of the discipline in their title (Ed.D, DClinPsy or DBA are common examples). The titles PhD and DPhil are commonly used for doctoral degrees awarded on the basis of original research. The level of study associated with a doctoral degree should typically equate to 3 calendar years full-time for a research-based doctoral degree although it may take up to 5 years of full-time study for a professional doctoral degree. Honorary doctorates are not eligible academic qualifications and are not accepted by QAA as academic qualifications.

## Section 5 - Assessing overseas qualifications

### NARIC equivalence data

- 5.1 When selecting trainees with overseas degrees, ITT providers should ensure that they follow the appropriate procedures when assessing overseas qualifications and ensure that they are compliant with the ITT requirements. This will involve obtaining, or asking the candidate to obtain, evidence from [the National Recognition Information Centre for the United Kingdom](#) (UK NARIC) which confirms whether or not the trainee's degree is comparable to UK British Bachelor, Masters or Doctorate level. The Statement of Comparability provided by NARIC as evidence *cannot* be used to establish the classification of the trainee's degree; this has to be done either by using the equivalence data in [Overseas Equivalence Data](#) document, or by making a professional assessment.
- 5.2 NARIC produced a set of independent data (see the [Overseas Equivalence Data](#) document) for the NCTL, to help ITT providers make assessments on whether overseas degrees were comparable to 2nd class honours and above. The study looked at all overseas degrees comparable to British Bachelor degree standard, and where the degree was comparable to an honours degree, equivalence to 2:2, 2:1 or 1st class honours was made, to help ITT providers determine the appropriate level of bursary award. The methodology used to produce the data is published on the DfE Grade comparisons of overseas qualifications webpage. UK NARIC does not recommend applying the methodology or the resulting dataset in other contexts. Please follow this [link](#) to the grade comparisons document.
- 5.3 Please access the equivalency table (PDF, 1MB) via this link. Please contact the Funding team at [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk) if you require further assistance or if the country from where your trainee's degree originates is not included in the data. This data is intended as an advisory guide for ITT providers, and ITT providers must use their professional judgement in determining eligibility.
- 5.4 For trainees in Maths and Physics who hold overseas degrees that are not deemed equivalent to 2nd class honours or above (but are degree equivalent), ITT providers are able to award a core bursary at Tier 4 providing that they are satisfied that the A level equivalent requirement is fully met.
- 5.5 It is important to note that many overseas qualifications sit either above or below "British Bachelor degree standard," and therefore will not be included in the data in the [Overseas Equivalence Data](#) document as they were outside of the original scope of the commissioned report. It is therefore important to seek a NARIC-sourced Statement of Comparability from the trainee to verify the actual degree itself before making any judgements about bursary eligibility. The data in the [Overseas Equivalence Data](#) document should not be used to inform judgements

about the trainee's qualification in general, and should be used to make an informed decision on the level of bursary associated with degrees which have been found comparable to honours level.

## Assessing overseas Bachelor's Degrees

5.6 Overseas undergraduate degrees that can be compared to a Bachelor's degree by NARIC, will usually have 3 outcomes:

- Comparable to British Bachelor (Ordinary) degree standard;
- Comparable to British Bachelor degree standard; or
- Comparable to British Bachelor (Honours) degree standard.

### British Bachelor (Ordinary) Degree standard

5.7 Where the trainee's first degree is comparable to "British Bachelor (Ordinary) degree standard", this means that the degree is based around a taught education, often multi-disciplinary, or with a broader range of subjects studied and more contact hours involved.

5.8 Comparison to British Bachelor (Ordinary) degree standard indicates that there is clear differentiation between the types of study programmes in that country. This means that the degree has been found to be below honours level and therefore the trainee would not be eligible for a bursary in principle, as would be the case had the trainee undertaken an Ordinary or non-honours degree in the UK. Ordinary degrees are not eligible for discretionary bursary funding.

### British Bachelor Degree standard

5.9 Where the trainee's first degree is comparable to "British Bachelor degree standard", this usually means that a comparison cannot be drawn with either an Ordinary or Honours degree, and this statement acknowledges the differences that may exist between institutions and programmes on a national level.

5.10 Comparison to "British Bachelor Degree standard" does not rule out the possibility of the qualification in a particular subject area or from a particular institution being comparable to an honours degree in the UK and therefore eligible for a bursary. ITT providers, if wishing to award a bursary, should use their professional judgement and consider all relevant information, including league tables for higher education institutions in that country, and any additional evidence of the trainee's own achievement to make an assessment. In these cases, ITT providers may also wish to seek advice from UK institutions that have a high intake of overseas trainees.

5.11 If ITT providers choose to award the bursary, this must be funded from their core allocation.

## **British Bachelor (Honours) Degrees without grading**

5.12 Where the trainee's first degree can be compared to "British Bachelor Honours degree standard" but there is no actual grading of the degree available as suggested by the equivalence data, ITT providers may award a core bursary at the initial 2:2 level for the appropriate ITT subject, providing they are satisfied that the trainee's degree is of the same depth and breadth as a degree with at least 2nd class Honours. ITT providers are also advised to seek a transcript of the trainee's degree if available.

5.13 If the provider wishes to award a higher level of bursary but there is no grading available, then this must be funded from discretionary funding and they are advised to seek further evidence of the trainee's achievement. Please contact the Funding team at [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk) if the data in the [Overseas Equivalence Data document](#) suggests that a grading should be available for the trainee's degree, but the trainee was not issued with a final grade.

## **Use of equivalence Data to Assign a Bursary Level**

5.14 Provider judgements on overseas degree equivalence to UK degree classifications can be supported by the data in the [Overseas Equivalence Data](#) document, if the trainee's degree is equivalent to "British Bachelor Honours degree standard", and has a grading available. Overseas degrees not equivalent to at least 2nd class honours as supported by the data in the [Overseas Equivalence Data](#) document are deemed equivalent to ordinary or 3rd class degrees, unless they have been compared to "British Bachelor degree standard" and the provider is able to defend their assessment that the individual's degree is equivalent to at least 2nd class honours. These bursaries can be funded from a provider's core allocation.

## **Countries Not Included in the Equivalence Data**

5.15 Where the data in the [Overseas Equivalence Data](#) document does not include the country from where the trainee holds their degree, or the data refers to a "case-by-case" analysis, then ITT providers should contact the Funding team at [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk).

5.16 ITT providers are reminded that they must hold full and transparent audit trails relating to core bursary payments which are made to trainees with overseas degrees which are not comparable to honours level as confirmed by the data in the [Overseas Equivalence Data document](#) and are equivalent to "British Bachelor

degree standard.” ITT providers who have made core or discretionary payments to trainees holding Ordinary degrees, or degrees which sit below Bachelor’s level, may lose their entitlement to award discretionary bursary payments in future academic years.

## Agreed exceptions to the overseas equivalence data

### France

- 5.17 The M1 qualification, which is awarded after exiting the new 2 year French Masters programme, can be treated in the same way as a Maitrise if the trainee has successfully completed 2 semesters and holds 240 credits. Alternatively, trainees exiting the new Masters programme may request a Maitrise on exit.
- 5.18 French trainees, who hold the Licence post 2009, and a score of 11, may be considered for bursary eligibility at 2:2 level. However, they must be able to demonstrate outstanding achievement and other merits in order to be considered.

### Colombia

- 5.19 The Licenciado and other Professional Titles obtained in Colombia are comparable to British Bachelor degree standard, due to the variance between institutions and programmes. However professional Licenciado titles which have been awarded an accreditation of excellence can be compared to British Bachelor (Honours) degree standard. Most institutions should be able to provide this confirmation, however it is also available on the Colombian National Council for Accreditation’s [website](#).
- 5.20 The NCTL will continue to review individual overseas degrees which may need further examination. The outcome of any reviews undertaken by NARIC will be published as new revisions to the equivalence data in the [Overseas Equivalence Data document](#).

## Overseas Master and Doctoral Degrees

- 5.21 Trainees who hold overseas Masters and Doctoral degrees may be assessed for eligibility independently of the [Overseas Equivalence Data document](#). ITT providers must carry out the necessary checks on the trainee’s overseas qualification that they would usually make when assessing eligibility for entry to an ITT course, and obtain a Statement of Comparability from NARIC or source confirmation from the trainee as advised in Section 5 of this guide.
- 5.22 Where a trainee’s degree can be compared to UK Masters or Doctorate level, these degrees should be treated as equivalent, and the appropriate bursary award should

be awarded for that ITT subject from the core bursary allocation as outlined in Section 2.

- 5.23 Any bursary awards for overseas Master's or Doctoral degrees which are not equivalent to a UK Master's or Doctoral degree must be funded from a provider's core bursary fund. ITT providers must use their professional judgement to determine the level of bursary, but must be prepared to build a strong case for awarding a higher bursary award than their qualification would suggest, as with discretionary cases. Trainees must hold an undergraduate degree of at least 2nd class honours or above in addition to holding an overseas Masters or Doctorate degree to be eligible for an upgrade from the discretionary bursary fund.
- 5.24 In exceptional cases, trainees who hold overseas Bachelor's and Master's or Doctoral degrees that both sit below British Bachelor Honours degree standard as confirmed by NARIC may be funded at the 2:2 level from a provider's core bursary allocation if the provider is able to provide a strong business case backed up by a full audit trail for bursary eligibility.
- 5.25 Information on how to record this information on the DMS will be sent to ITT providers and schools nearer the time of the October Census.

## Section 6 - Admissions

- 6.1 ITT providers will need to ensure those responsible for decisions on eligibility for the bursary are familiar with, or have access to, advice on the range of qualifications generally regarded as equivalent to a first (bachelor's) degree in the UK, including overseas qualifications, professional or vocational qualifications, and qualifications no longer available but held by mature applicants.
- 6.2 ITT providers will need to be aware of the range of degrees awarded by UK institutions. It is for the provider to decide whether an individual's highest relevant academic qualification meets the bursary eligibility criteria, and whether a particular qualification demonstrates the breadth and type of academic engagement that would be expected from undertaking a Bachelors, Masters or Doctoral degree.
- 6.3 ITT providers that are not themselves degree-awarding bodies, or are unfamiliar with assessing the validity of academic qualifications, may wish to familiarise themselves with the [Framework for Higher Education in England, Wales and Northern Ireland](#), maintained by the QAA.

## Section 7 - Eligibility criteria for receiving the bursary

7.1 For a trainee to be eligible to receive a bursary, the provider must ensure that, from the first day of training, the trainee meets, and continues to meet the criteria set out and further explained below. To be eligible for a bursary, the trainee must:

- be an 'eligible' student for the provision of UK student support;
- must be training in an eligible ITT subject listed in Annex A;
- hold a UK first degree with at least 2<sup>nd</sup> class honours, or equivalent, or be training in maths or physics, hold a relevant degree and have at least a grade B A level or equivalent in maths, further maths or physics;
- not already hold QTS, or be eligible to receive QTS;
- not be undertaking paid teaching work when receiving the bursary;
- be taking a qualifying postgraduate ITT course;
- not be taking any other ITT course;
- be notified by their ITT provider in writing that they are eligible; and
- comply with the terms and conditions of the bursary scheme.

### **Criterion 1: The trainee must be an 'eligible' student for the provision of UK student support.**

7.2 To receive a training bursary the trainee must meet one or more of the definitions for being an 'eligible' student to receive grants and loans towards tuition fees or living costs as set out in the current Education (Student Support) Regulations 2011, part two (eligibility), [no. 1986](#).

### **Criterion 2: The trainee must be training to teach in an eligible ITT subject listed in Annex A.**

### **Criterion 3: The trainee must hold a UK first degree or equivalent, with at least 2<sup>nd</sup> class honours, unless training in maths and physics (please see exceptions to criterion 3).**

7.3 ITT providers should use the trainee's highest academic qualification that aligns with a bursary tier, to determine eligibility for a bursary. ITT providers should be confident that a trainee's academic qualification has the same level of breadth and depth that would be expected of a UK first degree or equivalent with at least 2<sup>nd</sup> class honours.

7.4 **Exception to Criterion 3:** Trainees who are training in physics or maths and hold a relevant degree subject along with a B or above A level (or equivalent to) in maths, further maths or physics are eligible (depending on whether they meet the other criteria) to a Tier 4 bursary.



**Criterion 4: The trainee must not already hold QTS, be eligible to receive QTS or have previously failed a training programme leading to QTS.**

- 7.5 Individuals who already hold QTS on the first day of their ITT are not eligible to take up a NCTL allocated place. Under current reciprocal arrangements, most qualified teachers from countries in the European Economic Area (EEA) or Switzerland are able to receive mutual recognition if they apply directly to the NCTL.
- 7.6 Teachers who qualified in Australia, Canada, New Zealand and the USA can apply to the NCTL directly for [QTS](#), from 1 April 2013. ITT providers with such applicants should ask them to apply to the NCTL first; those that are successful in their application will not be eligible for an ITT place, or the bursary, but those that are unsuccessful in their application may be considered for eligibility.
- 7.7 Individuals who hold Qualified Teacher Learning Skills (QTLS) status from the Institute for Learning (IfL) can teach in schools as if they hold QTS, from 1 April 2013; however they must continue to maintain their registration with the IfL. They will still be able to apply for an ITT place and in turn receive a bursary. However they must hold a UK degree and A level requirements or equivalent to be eligible.

**Criterion 5: The trainee must not be undertaking paid teaching work when receiving the bursary.**

- 7.8 The bursary is designed to support the trainee whilst undertaking their ITT training and, in particular, their teaching practice. Trainees who undertake paid teaching in a school or institution become ineligible to receive the bursary from the date they start this work.
- 7.9 Trainees are deemed to be employed as a teacher if they are employed under a contract of employment or services with one or more local authorities, governing bodies or institutions to:
- be the head teacher or principal of one of more schools or institutions; or
  - carry out one or more of a range of specified activities at one of more schools or institutions.
- 7.10 This definition of a teacher can include people employed by a local authority to teach as a supply teacher in schools maintained by that authority, but does not include people employed by private teacher supply agencies or private tutors.
- 7.11 The definition of a teacher includes 'unqualified' teachers who meet one or more of the descriptions set out in paragraphs two and four – nine of schedule two in the Education (Specified Work and Registration) (England) Regulations 2003 ([no 1663](#)). Under this definition, teachers are permitted to carry out specified activity, including delivering lessons and assessing the development, progress and attainment of pupils. Please review these regulations for the full definition of specified activity.

7.12 The specified activities described above may count as teaching practice that leads towards the assessment of QTS. ITT providers must ensure that they communicate to their trainees that if they are employed to carry out one or more of the activities described above at the same time they receive the bursary, this would count as paid teaching and they will become ineligible.

7.13 ITT providers are advised to make it clear to trainees that they cannot undertake paid teaching work as outlined above and receive the bursary at the same time.

**Criterion 6: The trainee must be taking a qualifying postgraduate ITT course.**

7.14 To be eligible to receive a bursary, the trainee must be taking, and continuing to take, a qualifying postgraduate course. A qualifying postgraduate ITT course is:

- a course that, if successfully completed, will enable a trainee to be recommended for the award of QTS, and
- a postgraduate ITT course provided by an institution that has been accredited, and remains accredited, by the Training and Development Agency for Schools (TDA) the Teaching Agency (TA) or the National College for Teaching and Leadership (NCTL) to provide ITT.

**Criterion 7: The trainee must not be taking any other ITT course, scheme or programme.**

7.15 To be eligible for the training bursary, trainees must not be undertaking any other ITT course, training scheme or programme leading to QTS.

**Criterion 8: The trainee must be notified by their ITT provider in writing that they are eligible.**

7.16 The provider will determine whether a trainee is eligible to receive a bursary and whether they continue to receive it.

7.17 The trainee must be informed in writing, by their provider, that they are eligible. They do not become eligible for a bursary until the date the provider has made that determination and informed the trainee of their decision.

7.18 ITT providers should ensure that trainees are informed of whether they are eligible for the bursary, in good time before the start of their ITT course.

**Criterion 9: The trainee must comply with the terms and conditions of the new bursary scheme.**

7.19 Trainees must agree in writing to comply with the terms and conditions of the bursary scheme, including:

- promptly informing their ITT provider of any changes in their bank and address details,

- promptly informing their provider of their intention to withdraw, and
- signing a declaration of understanding that they will be expected to seek a teaching post in England upon completion of their ITT if they are in receipt of a bursary and undertaking a designated route to QTS.

7.20 ITT providers must make clear in their terms and conditions the bursary implications of not completing the course. Please see Section 12 Bursary and Scholarship payments on bursary payments for more detail.

7.21 The terms and conditions must also make clear how the ITT provider intends to pay the trainee. Please see Section 12 Bursary and Scholarship payments for more details on payment patterns.

7.22 If a trainee is found to be ineligible for the bursary, the provider must look to recover bursary payments from the trainee.

## Section 8 – Subject Knowledge Enhancement (SKE) trainees

- 8.1 Pre-initial teacher training (ITT) Subject knowledge enhancement (SKE) programmes are designed to help potential trainees gain the depth of knowledge needed to train to teach their chosen subject. These programmes can be delivered prior to commencement or alongside the ITT programme but must be completed before a recommendation to award Qualified Teacher Status (QTS) can be made. Arrangements for SKE for AY14/15 have now been published you can find the guidance and funding documents on our [webpage](#).
- 8.2 SKE funding will be available to any ITT providers and School Direct lead schools who have received allocated places in the subjects set out in the SKE operations manual.
- 8.3 In certain circumstances trainees who have accepted an NCTL-allocated place on pre-ITT SKE Programmes may be eligible for an SKE training bursary. The SKE operations manual for AY 2013/14 contains details about the availability and amount of SKE training bursary that may be requested for applicants in addition to the programme costs.
- 8.4 Please direct any queries to the NCTL Funding Team at: [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk).

## **Section 9: Trainees who teach outside of England**

- 9.1 The NCTL will look at the employment statistics of newly qualified teachers (NQTs) and where they take up a teaching post, to inform future allocations.
- 9.2 ITT providers are asked to be mindful that trainees who are not domiciled in England may look to seek a teaching post outside of England once they have qualified. ITT providers will be expected to seek assurances from trainees that they understand that they will be expected to seek a teaching post in England if they are in receipt of the bursary.
- 9.3 ITT providers are reminded that a high volume of NQTs trained at their institutions that do not go on to take up a teaching post in England may have a negative effect on future allocations.
- 9.4 The NCTL will collect data on trainees who are not domiciled in England and are accessing postgraduate bursaries. The NCTL reserves the right to request further information from ITT providers with high levels of trainees who are domiciled outside of England.

## Section 10: School Direct (tuition fee) bursaries

- 10.1 Home or EU trainees, who are training on a SD (tuition fee), may be eligible for a bursary depending on their degree class and the subject in which they wish to train to teach. A full list of eligible ITT subjects can be found in Annex A. Trainees undertaking the SD (tuition fee) route in a non-eligible ITT subject will not be eligible for the bursary.
- 10.2 Where the school has recruited a trainee outside of the ITT provider's pool of applicants, and wishes to make a case for a discretionary uplift, they may do so in partnership with the ITT provider. However any **decisions must be made as a partnership** and the ITT provider with whom the school are working to deliver SD (tuition fee) should inform the trainee directly of their bursary award.
- 10.3 Trainees who spend more than 60 days of their placement time in a school (or schools) which has more than 35 per cent of pupils that are eligible for Free School Meals (FSM), will be entitled to a **25 per cent uplift** to their existing bursary award. Trainees must be training via the **School Direct (tuition fee) only or have been recruited through the Scholarship programme**. Details of the awards and how they will be paid are set out in Section 12 Bursary and Scholarship payments. Trainees training in schools on the SD (tuition fee) which do not have more than 35 per cent of FSM pupils, will be entitled to a standard bursary award as set out Section 2 of this guide, providing they are training in an eligible ITT subject and meet the eligibility criteria.
- 10.4 The ITT provider should be responsible for the management and administration of bursary payments, including assessment of eligibility and awarding the bursary to the trainee. This also includes drawing up terms and conditions relating to receipt of the bursary.
- 10.5 ITT providers must work with their lead School Direct school who will advise of the schools in the partnership and the main school/s in which the trainee will train, to ensure that the correct information is made available in order to complete the data collection. The ITT provider with whom the SD (tuition fee) route is delivered will be required to return this information at the time of the Census collection in October 2014.
- 10.6 Provision for the 25 per cent uplift to a trainee's bursary will only be made once the ITT provider has confirmed the details of the eligible school via the Census October 2014, and this will be cross referenced with data in the DfE School Spring Census, published in January 2013 as part of the DfE Statistical First Release. The ITT provider will be required to start paying the bursary award once the trainee has commenced their training, and any extra funds due will be paid once the eligible school has been identified after the Census collection in October 2014.

10.7 The NCTL will be using the information taken from the Spring Schools Census 2013 FSM data to determine which schools have more than 35 per cent of pupils on FSM. This information is contained in an extract taken from the January Schools census which lists schools and their proportion of FSM eligible pupils as at January 2013. This can be found at <http://www.education.gov.uk/get-into-teaching/funding/postgraduate-funding> in the paragraph titled School Direct Bursary Top-up and should be used to establish eligibility of trainees for the uplift.

10.8 Please contact the Funding Team at [FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk) if you require assistance on assessing whether or not your school meets the criteria for FSM.

## Section 11: Scholarships Programme

- 11.1 The Department for Education (DfE), in partnership with a number of leading professional bodies, are jointly awarding Scholarships in Physics, chemistry, mathematics and computing. These are available to eligible trainees on eligible PGCE routes with a 2:1 or 1st degree. The scholarships are worth £25,000 and are open to any eligible physics, chemistry, mathematics or computing PGCE course leading to QTS in England, including SD (tuition fee) courses in these subject areas. Computing trainees who do not gain a scholarship will be subject to the standard bursary award.
- 11.2 The NCTL will be responsible for administering the £25,000 payment to ITT providers who are training scholars. This will be in the form of the top tier bursary award for the relevant subjects and the award will be weighted. Please see Section 12 for more information on how the award will be paid to trainees.
- 11.3 Trainees must hold a degree with at least 2nd class honours or equivalent, to initially apply; however trainees with degrees that sit below 2:1 level must possess strongly evidenced relevant degree-level subject knowledge to be considered for the next stage of the application process. Trainees who do not hold a degree at 2:1 or above can still be considered for a scholarship by considering additional experience/qualifications by applying the same principles as those relating to the award of a discretionary bursary.
- 11.4 Trainees will be assessed by the relevant professional body for eligibility for the scholarship, and will be informed by the body in writing that they have been recommended for the Scholarship. The trainee must have secured an eligible physics, chemistry, mathematics or computer science PGCE place by 1 September, for the scholarship to be validated. Successful scholars will inform the provider once they have been offered a place.
- 11.5 It is not necessary for candidates to have secured a physics, chemistry, mathematics or computing PGCE place prior to applying for the scholarship, and they may apply for the scholarship at any time before.
- 11.6 ITT providers must inform the NCTL in writing no later than 1 September 2014, of scholars on course in order to attract extra bursary funds. The NCTL will not allocate extra bursary funds for scholars who are recruited onto eligible physics, chemistry, mathematics or computing PGCE courses after 1 September 2013, apart from trainees studying on part-time or modular ITT courses which start after the Census date in October 2014.
- 11.7 The decision for entry to an eligible physics, chemistry, mathematics or computing PGCE course lies with the ITT provider, and scholars must meet, and continue to meet, all conditions of eligibility as set out in Section 7 of this guide before they can



receive the bursary. A trainee who has been recommended for a scholarship but is unsuccessful in securing a place on an eligible PGCE course by 1 September 2014 will lose their scholarship entitlement.

- 11.8 Trainees who hold the Scholarship will not be eligible for an additional bursary, however they may be eligible for an additional 25 per cent uplift to their existing bursary award, if they are on a SD (tuition fee), and the school in which they undertake the majority of their placement time (more than 50 per cent) and has more than 35 per cent of pupils eligible for Free School Meals (FSM). More information can be found on School Direct on the [DfE web pages](#).
- 11.9 Trainees who are not awarded the scholarship will continue in AY2014/15 to be eligible for the standard bursary for those with a 1st and 2:1 as set out in Section 2, providing they are successful in securing a physics, chemistry, mathematics or computing PGCE place. Trainees with queries regarding the Scholarship and assessment are advised to contact the relevant society as follows:
- Physics – Institute of Physics [website](#);
  - Chemistry – Royal Society of Chemistry [website](#);
  - Mathematics – Institute of Maths and It's Application (IMA) in collaboration with the London Mathematical Society (LMA) and the Royal Statistical Society (RSA). All queries should be directed to IMA via their [website](#); and
  - Computer Science – British Computer Society [website](#).

## Section 12 – Bursary and scholarship payments

- 12.1 [The ITT Implementation Plan](#), published in November 2011, set out that payment of the new bursary awards would be phased over the duration of the course to incentivise completion, with some weighting applied to the largest two awards.
- 12.2 Trainees should receive their bursary award in equal monthly instalments throughout the academic year; however trainees in receipt of the larger awards will receive two enhanced payments over the duration of their training.
- 12.3 The bursary awards are not taxable; however they may be treated as capital income for the purposes of assessing income for trainees in receipt of state benefits, as with student maintenance loans. ITT providers are advised to direct trainees towards their local benefits office to check whether this may affect their state benefits.

### Bursary awards at £12,000 and below for full-time courses

- 12.4 Bursary awards of **£4,000, £5,000, £6,000, £9,000, £11,000** and **£12,000** should be paid in equal monthly instalments over the duration of the course. The standard payment months for full-time courses are October to July of the academic year. The payment structure for bursary awards at £12,000 and under is set out in Figure 3.

Figure 3: Bursary payment schedules for awards at £12,000 and under to trainees studying full-time

Bursary award	Payment schedule
£4,000	10 equal monthly instalments of £400, from October to July
£6,000	10 equal monthly instalments of £600, from October to July
£9,000	10 equal monthly instalments of £900, from October to July
£11,000	10 equal monthly instalments of £1,100, from October to July
£12,000	10 equal monthly instalments of £1,200, from October to July

### Bursary awards at £15,000 and above for mainstream full-time courses

- 12.5 Bursary awards that are set at £15,000 and above should be paid so that a trainee receives equal monthly instalments for the duration of their course, but will also receive additional payments at two points during their training, which will make up their total bursary award.

12.6 The additional payments should be paid in the February of the trainee's ITT course and either July, or the final month in which the trainee successfully completes their ITT course. The trainee will have to satisfy two conditions in order to receive these enhanced payments, which are:

- That the trainee is present on programme at 1 January 2014; and,
- That the trainee completes their ITT programme.

12.7 The trainee would need to be on course at 1 January 2014 to receive the first enhanced payment, as this aligns with when the trainee has to be registered with the Student Loans Company (SLC) in order to receive student finance monies for their second term. The trainee would need to have completed the ITT course, to receive the second enhanced payment. Trainees who are on programme at 1 January 2014 but leave before the start of the second term payment point in February will not receive the first enhanced payment.

12.8 Figure 4 sets out the pattern of payments for trainees on full-time courses in receipt of awards that are set at £15,000 and above.

Figure 4: Bursary payment schedules for awards at £15,000 and above to trainees studying full-time

<b>Bursary award</b>	<b>Payment schedule</b>
£15,000	10 equal monthly instalments of £1,200, from October to July with additional payments of £1,500 in February and £1,500 in July or the final month in which the trainee completes the course
£20,000	10 equal monthly instalments of £1,400, from October to July with additional payments of £3,000 in February and £3,000 in July or the final month in which the trainee completes the course

## **Bursary awards at £12,000 and below for part-time and modular courses**

12.9 Trainees on part-time courses may be paid in larger instalments over the duration of the course, but ITT providers must ensure that no more than 50 per cent of the award is paid in any one instalment.

12.10 ITT providers can continue to pay the bursary award at the start and end of the course and the other half upon recommendation for QTS. However the payments should be not be weighted in such a way that they present cash flow problems to the trainee.

12.11 As part-time courses will span more than one academic year, ITT providers may award the bursary outside the period of October to July. ITT providers are reminded that any bursary payments made after 31 July of the academic year will be included as expenditure for the following academic year.

12.12 Figure 5 sets out the payment patterns for paying the bursary to trainees on part-time or modular programmes.

Figure 5: Bursary payment schedules for awards at £12,000 and under to trainees studying on part-time or modular courses

<b>Bursary award</b>	<b>Payment schedule</b>
£4,000	<p>1 2 equal payments of £2,000 at the start and end of the course or</p> <p>2 2 equal payments of £1,333 during the course plus 1 of £1,334 or</p> <p>3 Flexible payment plan for modular course ensuring that no more than £2,000 is paid in one instalment</p>
£6,000	<p>4 2 equal payments of £3,000 at the start and end of the course</p> <p>5 3 equal payments of £2,000 during the course</p> <p>6 Flexible payment plan for modular course ensuring that no more than £3,000 is paid in one instalment</p>
£9,000	<p>7 2 equal payments of £4,500 at the start and end of the course</p> <p>8 3 equal payments of £3,000 during the course</p> <p>9 Flexible payment plan for modular course ensuring that no more than £4,500 is paid in one instalment</p>
£11,000	<p>10 2 equal payments of £5,500 at the start and end of the course</p> <p>11 2 equal payments of £3,666 during the course plus 1 of £3668</p> <p>12 Flexible payment plan for modular course ensuring that no more than £5,500 is paid in one instalment</p>

£12,000	13 2 equal payments of £6,000 at the start and end of the course
	14 3 equal payments of £4,000 during the course
	15 Flexible payment plan for modular course ensuring that no more than £6,000 is paid in one instalment

## Bursary awards at £15,000 and above for part-time and modular courses

12.13 Trainees studying on part-time or modular courses, who are in receipt of the larger bursary awards, may continue to receive the bursary award in instalments as outlined for the smaller bursary awards. However, as with the larger full-time awards, they will be subject to weighting depending on attendance and completion of the course, as with the larger awards for full-time trainees.

12.14 The trainee will receive the enhanced payments at the end of the first half of their programme, and upon completion. The trainee will have to satisfy two conditions in order to receive these enhanced payments, which are:

- That the trainee is present on programme at the end of the first half of their programme; and
- That the trainee completes their ITT programme.

12.15 Figure 6 sets out the payment patterns for awards over £15,000 for trainees on part-time and modular courses.

Figure 6: Bursary payment schedules for awards at £15,000 and above to trainees studying on part-time or modular courses

Bursary award	Payment schedule
£15,000	<ul style="list-style-type: none"> <li>• Flexible payment pattern of instalments, the total of which should not equal £12,000, with 2 additional payments of £1,500 at the end of the first half of the programme, and upon completion of the programme</li> </ul>

£20,000	<ul style="list-style-type: none"> <li>Flexible payment pattern of instalments, the total of which should not exceed £14,000, with 2 additional payments of £3,000 at the end of the first half of the programme, and upon completion of the programme</li> </ul>
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## Withdrawals

12.16 Eligible trainees who withdraw from their course are entitled to be paid the training bursary for each month up to, and including, the month in which they withdrew. Trainees will only be entitled to receive the bursary payment for that month if they were still on the course at the time the payment was made.

12.17 In the event of withdrawal, the provider must suspend all bursary payments to the trainee immediately and ensure that their records are updated to reflect the withdrawal. The NCTL will not reimburse ITT providers who have paid the training bursary in error to trainees who have already withdrawn. The NCTL expects ITT providers to recover any overpayment of bursary from trainees. ITT providers should not make any pro rata training bursary payments to trainees.

## Returning trainees

12.18 Returning trainees who leave and then re-join their course will normally only be eligible to receive up to the value of the bursary award applicable in the year they started the course. In extenuating circumstances, where the length of the course is increased and the trainee needs to complete a longer period of training than expected, ITT providers should contact the NCTL, at:  
[FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk)

12.19 If a trainee leaves one ITT course which started after 1 August 2013 and joins a new one and carries with them advanced standing or credit from their previous ITT course, then this is viewed as a single route to QTS. Therefore the trainee will only be eligible for a training bursary up to the value agreed at the start of their course. This does not apply to trainees who started their ITT before 1 August 2013.

12.20 Where trainees are not charged a tuition fee because they are either repeating or returning after withdrawal, they will not be eligible for a new bursary award.

12.21 If a trainee does not take any advanced standing or credit from the previous ITT course, and is being charged a new tuition fee, this is viewed as a separate route to QTS. However, trainees who have already received a full bursary award on a previous route to QTS will not be eligible for another bursary.

## Scholarship payments at £25,000 (and £31,250)

12.22 In accordance with the [ITT Implementation Plan](#), payment of Scholarship awards will be phased over the duration of the course to incentivise completion. Figure 7 sets out the pattern of payments for trainees studying full time or part time or modular courses.

Figure 7: Payment schedules for Scholarship awards at £25,000 (and £31,250 where FSM uplift applies)

Scholarship award and mode of study	Payment schedule
£25,000 – trainees studying full-time	<ul style="list-style-type: none"> <li>10 equal instalments of £2,000 from October to July with enhanced payments of £2,500 in February and £2,500 in July or the final month in which the trainee completes the course</li> </ul>
£25,000 – trainees studying part-time or on modular courses	<ul style="list-style-type: none"> <li>Flexible payment pattern of instalments, the total of which should not exceed £20,000, with 2 additional payments of £2,500 (one at the end of the first half of the programme, and one on completion of the programme)</li> </ul>
£31,250 – trainees studying full-time	<ul style="list-style-type: none"> <li>10 equal instalments of £2,500 from October to July with enhanced payments of £3,125 in both February and July or the final month in which the trainee completes the course.</li> </ul>

## School Direct (tuition fee) bursaries

12.23 SD (tuition fee) bursaries for trainees who spend the majority of their time in schools with more than 35 per cent of pupils eligible for Free School Meals, as verified in the Spring Schools Census at January 2013, should be administered in exactly the same way as the standard postgraduate bursaries. However bursary awards at £18,750 and above should be weighted in the same way as the standard bursary awards. The bursary awards and payment plans are set out in Figure 8.

Figure 8: Bursary payment schedules for SD (tuition fee) awards

Bursary award with 25% uplift	Payments to trainees on SD (tuition fee) courses with 25% uplift
£5,000	10 equal monthly instalments of £500, from October to July
£11,250	10 equal monthly instalments of £1,125, from October

	to July
£15,000	10 equal monthly instalments of £1,500, from October to July
£18,750	10 equal monthly instalments of £1,375 and 2 additional payments of £2500 in February and July/end of programme
£25,000	10 equal monthly instalments of £2,000 and 2 additional payments of £2500 in February and July/end of programme

12.24 For trainees on the SD (tuition fee) route studying part-time, weighting will need to be applied to the largest 2 awards of £18,750 and £25,000. Figure 9 sets out how this weighting should be applied.

Figure 9: Bursary payment schedules for SD (tuition fee) awards at £18,750 and above

<b>Bursary award with 25% uplift</b>	<b>Payment schedule</b>
£18,750	Flexible payment pattern of instalments, the total of which should not £13,750, with 2 enhanced payments of £2,500 at the end of the first half of the programme, and upon completion of the programme
£25,000	Flexible payment pattern of instalments, the total of which should not £17,000, with 2 enhanced payments of £4,000 at the end of the first half of the programme, and upon completion of the programme

12.25 ITT providers should allocate SD (tuition fee) bursary awards, in monthly instalments at the start of the trainee's programme; however the extra funds for the 25 per cent uplift will not be paid to ITT providers until the main schools in which the trainee undertakes the majority of their training has been identified in the 2013 Census collection, and the school has been appropriately verified via the January 2013 School Census dataset. ITT providers may not request funds for the uplift in advance of the Census collection.

12.26 SD (tuition fee) bursaries should be managed in the same way as the standard mainstream bursaries, the details of which are set out above.



## **Section 13: Monitoring, assurance and data requirements**

### **Monitoring and Assurance**

- 13.1 ITT providers must hold full records of all trainees in receipt of bursaries, including details of the trainees' academic qualifications achieved prior to starting their ITT. Trainees must be in receipt of the degree on which they are assessed, prior to starting the course. The NCTL reserves the right to request these details, at any point during the academic year from ITT providers, for the purpose of monitoring quality.
- 13.2 The NCTL will seek rigorous assurance about the bursaries allocated, including those funded from the discretionary bursary fund, to eligible trainees via the annual and interim Census data collections and the annual Audit Grant reporting process, both of which will need to be verified by ITT institution's Responsible Officer.
- 13.3 The NCTL will review allocated training bursary funding that ITT providers receive and reconcile this amount with the trainee records submitted at each census point. Funding will be adjusted at these points to meet the actual amount required. Where funding received has exceeded the total amount required for actual trainees then the NCTL will seek to recover the excess by means of invoice.
- 13.4 ITT providers are reminded of the need to ensure that all trainee records on the Data Management System are complete. Where there is a lack of accurate or complete data, this may result in provider payments being delayed until the data can be corrected.
- 13.5 The NCTL will carry out a reconciliation exercise between the bursaries allocated, and the actual trainee records as confirmed by the HESA and SCITT data collection exercises. In the event of any variances, particularly with regard to unclassified degrees, the NCTL reserves the right to contact ITT providers to request explanations of the variances and to seek further information. ITT providers who have paid bursaries to trainees who hold degrees that sit below 2:2 will not be reimbursed for any expenditure and funding will be adjusted accordingly following the submission of the audit grant report.

### **Data requirements and reporting**

- 13.6 Schools and ITT providers are required to share data on School Direct with NCTL, including data on applications, recruitment and employment outcomes.

## Data requirements from schools

13.7 Once a candidate has been recruited, lead schools are required to give accurate data to their partner ITT provider regarding which schools the trainee is undertaking their training. This must include the dates of the training periods so that this can be up uploaded into the Schools DMS. The relevant uplifts to training bursaries and School Direct salary funding will be calculated on the basis of the trainee spending more than 50 per cent of their training in a school or schools, where more than 35 per cent of pupils are eligible for FSM.

## Data requirements from ITT providers

13.8 Failure to comply with requests for data may result in non-compliance for the ITT provider, which may lead to eventual withdrawal of accreditation. If this does happen the lead school would have to find a new accredited ITT provider with whom to work.

## HEI providers

13.9 Trainee data will be collected via the Higher Education Statistics Agency (HESA) Initial Teacher Training In Year Record. Providers need to submit trainee level data, trainees will have a Teacher Training Course codes which are to be confirmed.

13.10 Once the data has been imported into the HEI Data Management System (DMS) for each trainee. For School Direct trainees ITT providers are required to indicate the Lead School and up to five schools where the trainee will be undertaking their training during their ITT course.

13.11 Details of the process are available in the HEIDMS Guidance document which is available to users of the HEIDMS. Further information on this is sent out prior to the start of each new academic year. HEI providers can contact the Helpdesk via [TASupport@Texunatech.com](mailto:TASupport@Texunatech.com) to gain access to the HEIDMS.

## Non-HEI providers

13.12 Non-HEI ITT providers need to submit trainee level data. Provider or School Direct trainees can be identified by selecting the appropriate route options on the trainee form. For School Direct, ITT Providers will be required to indicate the Lead School and up to five schools where the trainee will be undertaking their training during their ITT course.

13.13 Full details of the process are available in the NCTLDMS Guidance document which is available to users of the NCTLDMS. Further information on this is sent out prior to the start of each new academic year. New users can contact the Helpdesk via mailto:[SchoolsDMSsupport@texunatech.com](mailto:SchoolsDMSsupport@texunatech.com) to gain access to the NCTLDMS.

## Annex A: List of subjects eligible for a bursary

Allocated ITT subject	Scholarship subject	Subject Priority	Bursary Tier <sup>1</sup>
Applied art and design		Non-priority	Not eligible
Applied business		Non-priority	Not eligible
Applied science		Non-priority	Not eligible
Art and design		Non-priority	Not eligible
Biology		Other priority	Tier 1, 2
Business studies		Non-priority	Not eligible
Chemistry	yes	High priority	Tier 1, 2, 3
Citizenship		Non-priority	Not eligible
Classics <sup>2</sup>		Other priority	Tier 1, 2
Computer science <sup>3</sup>	yes	High priority	Tier 1, 2, 3
Dance		Non-priority	Not eligible
Design and technology		Other priority	Tier 1, 2
Drama		Non-priority	Not eligible
Engineering <sup>4</sup>		Other priority	Tier 1, 2
English		Other priority	Tier 1, 2
Geography		Other priority	Tier 1, 2
Health and social care		Non-priority	Not eligible
History		Other priority	Tier 1, 2
Leisure and tourism		Non-priority	Not eligible
Manufacturing <sup>4</sup>		Other priority	Tier 1, 2
Mathematics	yes	High priority	Tier 1, 2, 3, 4
Media studies		Non-priority	Not eligible
Modern languages <sup>5</sup>		High priority	Tier 1, 2, 3
Music		Other priority	Tier 1, 2
Physical education		Non-priority	Not eligible
Physics	yes	High priority	Tier 1, 2, 3, 4
Physics with mathematics		High priority	Tier 1, 2, 3, 4
Primary - general		Other priority	Tier 1, 2
Primary - FS/KS1		Other priority	Tier 1, 2
Primary mathematics specialist		Primary maths specialist	Tier 1, 2, 3

Primary PE specialist		Other priority	Tier 1, 2
Psychology		Non-priority	Not eligible
Religious education		Non-priority	Not eligible
Social sciences		Non-priority	Not eligible

1 The bursary level and award is dependent on the subject in which a trainee wishes to teach and the outcome of their highest qualification.

2 Classics with a languages bias such as Latin or Greek will receive a bursary under the Modern languages heading.

3 Computer science is listed as 'computing' in the bursary subjects.

4 Engineering and manufacturing receive a bursary under Design and technology heading.

5. Modern languages listed as 'languages' in the bursary subjects. 'Modern language' includes any modern language and classics with a languages bias such as Latin or Greek.

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## Annex B: List of relevant degree subjects for maths and physics bursaries based on good A levels

Relevant degree is the definition used by the School Workforce Survey. The following subjects are considered to be a relevant degree subject to enable trainees to become eligible for a bursary (depending on their A level) if training in maths and physics.

### Maths

**G100 - Mathematics**

**G200 - Operational Research**

**G300 - Statistics**

**G900 - Others in Mathematical and Computing Sciences**

### Physics

**F200 - Materials Science**

**F300 - Physics**

**F500 - Astronomy**

H100 - General Engineering

H200 - Civil Engineering

H300 - Mechanical Engineering

H400 - Aerospace Engineering

H500 - Naval Architecture

H600 - Electronic and Electrical Engineering

H700 - Production and Manufacturing Engineering

H900 - Others in Engineering

For physics above, the subjects in **bold** are considered as 'Mapped subjects 1', meaning they hold a degree level qualification to teach physics. The other subjects are 'Mapped subjects 2', meaning that they hold a degree level qualification to teach engineering primarily but *also* physics. There are no second mapped subjects for maths.

## Change log

Version	Published date	Changes made
1.	December 2013	
1.1	February 2014	Corrected paragraph reference in footnote p15.
1.2	June 2014	Revision to FSM eligibility description Para 10.3 & Footnote 1 p9. Removal of exception to IoM/Channel islands candidates. Additional information for Troops to Teach eligibility para 2.11. Addition of payment schedule for scholarship with FSM uplift. Updated discretionary award guidance para 3.4. Fig 7 p39
1.4	January 2014	Section 12.18 removed (withdrawing trainees). A level updated to include equivalents.



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