

Withdrawn



Department
for Education

Further education initial teacher training

Mathematics and English language
bursary guide: academic year 2017/18

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Section 1 – Introduction and Overview

Introduction

1. This guide covers the operational delivery of Further Education (FE) initial teacher training (ITT) bursaries. Its primary audience is ITT providers, but it can be used as a source of reference for trainees. This is a live document and subsequent revisions may be issued. The information, training bursary rates, qualifying subjects and associated degree classifications contained within this document are all relevant for trainees starting training during academic year 2017/18 only.
2. Although there are similarities with the school teacher bursary scheme, this is a separate arrangement. The scheme is administered by the National College for Teaching and Leadership (NCTL).
3. The funding available is limited and will be allocated on a “first come, first served” basis. Early application is therefore advisable for students who meet the necessary qualifying requirements. Applications from providers must be received within 6 weeks of students starting their course.
4. Applications will only be approved for the subjects of mathematics and English. The Department for Education (DfE) continues to work with a variety of organisations, including the Education and Training Foundation, to provide support for the FE sector to improve the training for new and existing teachers to support learners with additional needs.
5. ITT providers should seek assurance from trainees in receipt of a bursary to the effect that they understand that they are expected to seek a teaching post in FE in England upon successful completion of their course.

Overview

6. The training bursary is a financial incentive to attract and retain new high quality graduates to become teachers in the English FE sector. Bursary levels will vary according to the degree classification held by the trainee and the specialism in which they wish to train to teach i.e. English language, mathematics (from basic to GCSE and Level 3). Trainees must have at least a 2:1 class or equivalent degree to access a bursary for English language. And a 2:2 for mathematics.

7. The bursary scheme has been designed to acknowledge a trainee’s prior academic achievements and their potential to teach, with the top tier of the bursary payments for trainees with 1st class degrees, the second tier for those with a 2:1, a third tier aligned with 2:2.
8. The eligible bursary awards and levels are outlined in more detail in Section 2 of this guide.

Figure 1 – Available financial incentives and eligibility criteria

ITT Specialism	Degree Class	Degree Class	Degree Class
	1 st	2:1	2:2
Mathematics	£25,000	£25,000	£25,000
English	£9,000	£9,000	No bursary

9. Providers will receive monthly payments to pass on to trainees who are eligible for the bursary. The amount of these monthly payments will reflect the total needed to pass on to eligible trainees, in accordance with the schedule set out in Section 6 of this guidance. Bursary funding is limited and once all of the funding has been allocated no more will be available. Providers should allocate bursaries to qualifying trainees on a “first come, first served” basis.
10. The total amount of bursary funding will be paid based on the trainee records that providers will submit, which will detail the level of bursary awarded. ITT providers will only receive a payment once we know about (an) eligible trainee(s) starting training. The amount will be sufficient to cover instalments as outlined in Section 8. Payments will be adjusted in-year to reflect the actual trainee records to take into account any withdrawals and trainee information returns completed by providers. The bursary application form can be downloaded from [GOV.UK](https://www.gov.uk). Failure to follow the process will delay payment and risks
11. The level of bursary for which a trainee is eligible will depend on their most relevant academic qualification, combined with the specialism in which they are training to teach. For the purpose of awarding the bursary to a trainee, providers should take the highest relevant academic qualification that aligns with a bursary tier. This, combined with the specialism on which their training is focused, will determine the level of bursary award for which the trainee is eligible.

12. The bursary is available to all eligible home or European Union (EU) status trainees on eligible postgraduate routes that provide specialist training in English or mathematics. Trainees should hold at least a UK degree or equivalent, with at least a 2:2 class or equivalent to be eligible for the mathematics bursary and a 2:1 class to be eligible for the English Language bursary. Eligibility status is determined by the provider and must be established prior to making any decisions on bursary entitlement.
13. Where the trainee has a degree from outside the UK, providers may find the Information about Overseas Equivalence in Annex B helpful in reaching a decision about overseas degree equivalence to UK degree classification.
14. Providers must distinguish between eligibility for the bursary and eligibility for a postgraduate ITT route at their institution. **Being ineligible for a bursary should not make a trainee ineligible for an ITT place.** There is no requirement for providers to decline applications solely because the trainee is ineligible for a bursary or because the available bursary funds have been allocated. Providers continue to control the selection and recruitment of ITT trainees and this process of selection and recruitment remains independent of bursary eligibility.
15. Trainees who are not able to convince the ITT provider that they have the necessary underpinning knowledge to teach mathematics across the full range may be considered to attend a Subject Knowledge Enhancement (SKE) programme to help bring them up to the required standard.
16. Further details of the SKE programme are set out in Section 5.

Section 2 - Core Bursary Award Eligibility and Duration

Eligibility

1. Bursaries are only for those trainees taking a specialist teaching qualification for either mathematics or English to equip them with the knowledge, pedagogy and confidence to teach English, mathematics and numeracy from basic level through to GCSE, to Level 3. However, trainees on generic programmes may also be entitled to bursaries if they follow a specialist pathway through the optional units and in the provider's opinion, the combination of course content, teaching practice in the subject specialism and existing qualifications, equips them to teach English and mathematics from a basic level through to GCSE and Level 3. It will be for providers to make judgements about this, and the extent to which for particular trainees, additional specialist training and teaching practice might be required.
2. The bursary level and award is dependent on the subject area in which the trainee wishes to teach and the outcome of their most relevant qualification. The subject of the trainee's academic qualification is also an important consideration in determining eligibility for the English and mathematics bursary. It will be for providers to make judgements about this, using the following guidelines:

Mathematics

3. To teach mathematics, trainees should ideally have a mathematics degree; or a joint degree with mathematics; or a degree like physics or engineering, where the mathematics element is significant. But other degrees will be considered, subject to the ITT provider's judgement that the applicant has the necessary underpinning knowledge, skills and capacity to teach mathematics to students from basic to GCSE and Level 3.

English Language

4. To teach English language, trainees should have an English language degree, or a humanities degree with a significant English language or linguistics component. But other degrees will be considered subject to the ITT provider's judgement that the applicant has the necessary underpinning knowledge, skills and capacity to teach English language to students from basic to GCSE level.

Duration

5. 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.
6. Bursaries are not only financial incentives to encourage high quality graduates into ITT, but are intended to encourage successful retention and completion of the course. Bursary payment arrangements can be found in Section 6 of this guide.
7. Figure 2 sets out the bursary rates for academic year (AY) 2017/18. These are relevant to (AY) 2017/18 only and do not provide assurances about any future bursary rates. We advise against providers giving any assurance to potential trainees on future bursary rates until these are released by the DfE.

Figure 2: Financial incentives for those who train in 2017/18

ITT Specialism	Degree Class	Degree Class	Degree Class
	1 st	2:1	2:2
Mathematics	£25,000	£25,000	£25,000
English	£9,000	£9,000	No bursary

Eligible ITT subjects

8. Mathematics will attract a bursary if the trainee has a 2:2 class or equivalent degree or above. English language will attract a bursary if the trainee has a 2:1 degree or above. The bursary levels will vary depending on the trainee's degree classification and subject, as shown in figure 2 above.
9. PhDs will attract the same bursary award as a 1st class honours degree; and Master's degrees will attract the same bursary award as a 2:1. However there are some restrictions on this – see Annex A for further information.

Section 3 - Eligibility Criteria for Receiving the Bursary

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 then continues to meet, the criteria set out and explained below. The trainee must:
 - i. Be an 'eligible' student for the provision of UK student support
 - ii. Must be training through an eligible specialist programme - English language or mathematics
 - iii. Hold a UK first degree with at least 2nd class honours or equivalent
 - iv. Not already hold QTS/QTLS or be eligible to receive QTS/QTLS
 - v. Not be undertaking paid teaching work when receiving the bursary, subject to the exception set out below
 - vi. Be taking a qualifying specialist ITT course at Level 5 or above
 - vii. Not already hold a full level 5 teaching qualification – PGCE, DTLLS or DET
 - viii. Not be taking any other ITT course
 - ix. Be notified by their ITT provider in writing that they are eligible
 - x. Comply with the terms and conditions of the bursary scheme
 - xi. Where relevant, have completed a mathematics SKE scheme within the agreed timescale
 - xii. An application must be received by NCTL from providers within 6 weeks of their student starting a course.

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

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.
3. The only exceptions to this are for trainees who are ordinarily resident in the Channel Islands or Isle of Man. These trainees are not eligible to access the UK student support system, but this does not prevent them being eligible for the training bursary, so long as the trainees satisfy all

other eligibility criteria.

Criterion 2: The trainee must be training to teach through an eligible ITT specialist programme

4. Trainees will be training to teach English language, mathematics from basic to GCSE and Level 3 and be committed to teaching in the FE sector.

Criterion 3: The trainee must hold a UK first degree or equivalent, with at least 2nd class honours

5. Providers should use the trainee's highest relevant academic qualification that aligns with a bursary tier, to determine eligibility for a bursary. If equivalents are being considered, 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 2nd class honours.

Criterion 4: The trainee must not already hold QTS/QTLS, or be eligible to receive QTS/QTLS

6. Individuals who already hold QTS/QTLS on the first day of their ITT are not eligible.

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

7. The bursary is designed to support the trainees whilst undertaking their ITT and, in particular, their teaching practice. Providers are advised to make it clear to trainees that, with the exception set out in paragraph 8 below, they cannot undertake paid teaching work and receive the bursary at the same time.
8. Trainees who are funding their own training (in their own time) to achieve a full level 5 or better teaching qualification and who undertake paid teaching, whether part-time or on a sessional basis, in a school or institution other than the one at which they are being trained, may be eligible for a bursary subject to their meeting the other eligibility conditions. The ITT provider must be assured that the paid teaching commitment will not interfere with attendance at the ITT course and the carrying out of the required teaching practice. **NB The paid teaching commitment may not be used as the required teaching practice.**

Criterion 6: The trainee must be taking a qualifying specialist ITT course at Level 5 or above

9. To be eligible to receive a bursary, the trainee must be taking a qualifying ITT course at Level 5 or above. A qualifying course is one of the following Diplomas or an equivalent HEI qualification:

a. Level 5 Diploma in Education and Training including a specialist pathway (TQT)

- i. *Level 5 Diploma in Education and Training (including teaching English: Literacy)*
- ii. *Level 5 Diploma in Education and Training (including teaching English: Literacy and ESOL)*
- iii. *Level 5 Diploma in Education and Training (including teaching Mathematics: Numeracy)*
- iv. *Level 5 Diploma in Education and Training (including teaching Disabled Learners)*

b. Level 5 integrated specialist diplomas (TQT):

- i. *Level 5 Diploma in Education and Training (English: Literacy)*
- ii. *Level 5 Diploma in Education and Training (English: Literacy and ESOL)*
- iii. *Level 5 Diploma in Education and Training (Mathematics: Numeracy)*
- iv. *Level 5 Diploma in Education and Training (Disabled Learners)*

- c. Level 5 Diploma in Education and Training (TQT) on the condition that the provider is absolutely confident that the trainee has prior qualifications and exceptional experience or knowledge that a generic course can build on, to equip them to the same standards as the above two courses i.e. Diploma in Education and Training including a specialist pathway or Integrated Specialist Diplomas - perhaps by using and tailoring part of the (undefined) 45 optional credits to enhance the trainees knowledge/skills in English or mathematics; and effectively using the teaching practice element for the subject specialism.**

Note: For further information on specialist qualifications, see the appropriate guidance produced by LSIS in May 2013 to support HEIs and Awarding Organisations to develop their respective specialist qualifications:

- LSIS May 2013 Teaching and Training Qualifications for the Further Education and Skills Sector in England (2013) Guidance for higher education institutions
- LSIS May 2013 Qualification Guidance for awarding organisations
- Level 5 Diploma in Education and Training (English: Literacy)/(English: Literacy and ESOL)/(Mathematics: Numeracy)
- Level 5 Diploma in Teaching English: Literacy/English: Literacy and ESOL/Mathematics: Numeracy.

These guidance documents specify the qualification content and teaching practice requirements.

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

10. To be eligible for the training bursary, trainees must not be undertaking any ITT course, training scheme or programme leading to QTS other than those specified in 6.10 above.

Criterion 8: The trainee must not already hold a level 5 teaching qualification e.g. PGCE, DTLLS or DET.

11. To be eligible for the training bursary, trainees must not already hold a level 5 teaching qualification such as PGCE, DTLLS or DET.

Criterion 9: The trainee must be notified by their ITT provider in writing that they are eligible

12. The provider will determine whether a trainee is eligible to receive a bursary and whether they continue to receive it.
13. 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.
14. 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 10: The trainee must comply with the terms and conditions of the new bursary scheme

15. Trainees must agree in writing to comply with the terms and conditions of the bursary scheme, including:
 - a. promptly informing their ITT provider of any changes in their bank and address details;
 - b. promptly informing their provider of their intention to withdraw; and
 - c. signing a declaration of understanding that they will be expected to seek a teaching post in the FE sector in England upon completion of their ITT if they are in receipt of a bursary.
16. Providers must make clear in their terms and conditions the bursary implications of not completing the course. Please see Section 7 on bursary payments for more detail.
17. The terms and conditions must also make clear how the ITT provider intends to pay the trainee. Please see Section 7 for more details on payment patterns.
18. If a trainee is found to be ineligible for the bursary, the provider must recover any payments that have been incorrectly paid to the trainee.

Criterion 11: The trainee must complete a mathematics SKE scheme within the agreed timescale

19. If, as a condition of starting a mathematics ITT course, the trainee is required to undertake a mathematics SKE programme, the trainee must complete that programme within the agreed timescale in order to continue to be entitled to a bursary.
20. It is the provider's responsibility to assure themselves that the SKE programme has been completed to their satisfaction. This must be done to confirm that the candidate has successfully completed the ITT programme. Where a trainee does not complete the SKE programme, the entitlement to the bursary should cease on the basis that they have not acquired the necessary knowledge to enable them to teach.

Section 4 - Admissions

1. 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 degree in the UK, including overseas qualifications, professional or vocational qualifications, and qualifications no longer available but held by mature applicants.
2. 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.
3. 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 Qualifications in England, Wales and Northern Ireland (FHEQ) by the QAA. [Link to Framework](#)
4. Further guidance about how to assess the equivalency of UK qualifications is provided at Annex A.

Section 5 – Subject Knowledge Enhancement (SKE) Programme for Mathematics

1. Some people who apply for ITT with the potential to become outstanding mathematics teachers may not have enough specific subject knowledge to begin a mathematics ITT course. SKE programmes are pre-ITT programmes designed to help these applicants gain the depth of subject knowledge needed to train to teach their chosen subject. These arrangements will only apply to the subject of mathematics, and only for pre-service postgraduate programmes. They are specifically to support those programmes which enable trainees to teach mathematics to GCSE and Level 3.
2. SKE programmes can be delivered prior to starting or alongside the ITT course. Arrangements for SKE are set out in the SKE guide.
3. Providers must direct any queries about the possible use of SKE to DfE through the following email address:
FE.workforceincentives@education.gov.uk

Section 6 – Bursary Payments

1. This section covers bursary payments for ITT courses. Separate arrangements are available to pay bursaries for trainees who need to complete a mathematics SKE scheme, but trainees cannot get an SKE bursary at the same time as an ITT bursary. Full details are in the SKE Guidance.
2. ITT providers will receive monthly payments sufficient to cover the instalments for each eligible trainee they have reported. Bursary awards 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.
3. The bursary awards are not taxable; however they may be treated as capital for the purposes of assessing income for trainees in receipt of means-tested state benefits. Providers are strongly advised to direct trainees towards their local benefits office to check whether this may affect their state benefits.
4. The payment structure for bursary awards of £9,000 and below is set out in Figure 5. Arrangements for the monthly payments to trainees commencing training at other times in the academic year will be provided separately.

Figure 5: Bursary payment schedules for awards of £9,000 and below

Bursary award	Payment schedule
£4,000	10 equal monthly instalments of £400, from October to July
£9,000	10 equal monthly instalments of £900, from October to July

5. Trainees in receipt of the larger awards should receive two enhanced payments over the course of their training.

Bursary awards at £15,000 and above

6. 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 enhanced payments at two points during their training, which will make up their total bursary award.
7. The enhanced 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:

- a. That the trainee is present on programme at 1 January 2018; and
 - b. That the trainee completes their ITT programme.
8. The trainee would need to be on a course on 1 January 2018 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 a programme on 1 January 2018 but leave before the start of the second term payment point in February will **not** receive the first enhanced payment.
9. Figure 6 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 6: Bursary payment schedules for awards at £15,000 and above to trainees studying full-time

Bursary award	Payment schedule
£15,000	10 equal monthly instalments of £1,200, from October to July with enhanced 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 enhanced payments of £3,000 in February and £3,000 in July or the final month in which the trainee completes the course
£25,000	10 equal monthly 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

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

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

11. Providers can pay bursaries in instalments (e.g. at the start and end of the course and on completion). However, the payments should not be weighted in such a way that they present cash flow problems to the trainee.
12. As part-time courses will span more than one academic year, providers may award the bursary outside the period of October to July. 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.
13. Figure 7 sets out the payment patterns for paying the bursary to trainees on part-time or modular programmes.

Figure 7: Bursary payment schedules for awards at £12,000 and under

Bursary Award	Payment schedule
£4,000	2 equal payments of £2,000 at the start and end of the course; or 2 equal payments of £1,333 during the course plus 1 of £1,334; or Flexible payment plan for modular course ensuring that no more than £2,000 is paid in one
£9,000	2 equal payments of £4,500 at the start and end of the course 3 equal payments of £3,000 during the course Flexible payment plan for modular course ensuring that no more than £4,500 is paid in one instalment

Bursary awards at £15,000 and above

14. 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.
15. 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:
 - a. That the trainee is present on the programme at the end of the first half of their programme; and

b. That the trainee completes their ITT programme.

16. Figure 8 sets out the payment patterns for awards over £15,000 for trainees on part-time and modular courses.

Figure 8: 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	Flexible payment pattern of instalments, the total of which should not equal £12,000, with 2 enhanced payments of £1,500 at the end of the first half of the programme, and upon completion of the programme
£20,000	Flexible payment pattern of instalments, the total of which should not exceed £14,000, with 2 enhanced payments of £3,000 at the end of the first half of the programme, and upon completion of the programme
£25,000	Flexible payment pattern of instalment, the total of which should not exceed £20,000 with 2 enhanced payments of £2,500 the first at the end of the second half of the programme, and upon completion of the programme

Withdrawals

17. Eligible trainees who withdraw from their course or specialist modules 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.

18. 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 providers who have paid the training bursary in error to trainees who have already withdrawn. NCTL expects providers to recover any overpayment of the bursary from trainees. Providers should not make any pro rata training bursary payments to trainees.

19. Providers must inform ITT.Funding@education.gov.uk immediately when a trainee withdraws from an ITT programme or from continuing with the

specialism agreed with the provider at the start of the course.

20. For enhanced payments, a trainee who starts in September 2017 but withdraws after 1 January 2018 will not receive their enhanced payment in February.

Returning trainees

21. 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, providers should contact the NCTL.
22. If a trainee leaves one ITT course which started after 1 August 2017 and joins a new one, and they carry with them advanced standing or credit from their previous ITT course, the trainee will only be eligible for a training bursary up to the value agreed at the start of their course.
23. 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.
24. 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. However, trainees who have already received a full bursary award on a previous route will not be eligible for another bursary.

Repayment

25. In selecting candidates, ITT providers should consider that, after completion of their course, trainees are expected to enter a teaching post in the FE sector in England. Whilst bursary payments will be recovered if they have been paid in error, there will be no recovery where a trainee completes a course but fails to secure a teaching post in the subject they have studied; or fails to secure a teaching post.

Suspended Trainees

26. Trainees who are suspended from their course pending investigation may continue to receive their bursary payments. Payments will be stopped immediately if a decision is reached to conclude their programme. Any final

bursary payment will be determined using the rule in paragraph 17 in this section. Any payments made in error by the ITT provider may be recovered from the trainee.

Section 7: Monitoring and Assurance

1. 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**. DfE and the NCTL reserve the right to request these details at any point during the academic year from providers, for the purpose of monitoring quality.
2. DfE will seek rigorous assurance about the bursaries allocated to eligible trainees from the trainee information record, which will need to be verified by an institution's Responsible Officer as being a true and accurate record. Trainee information must be provided on the application form which can be downloaded from [GOV.UK](https://www.gov.uk) Providers must use this as the basis for creating a composite record for all trainees. This should be kept up to date as new trainees are recruited, and submitted to NCTL at ITT.Funding@education.gov.uk as a claim for bursary funds. **Note:** this address should ONLY be used for trainee records. Enquiries that trainees have about bursaries should be directed to either the ITT provider (if already accepted/enrolled on a course) or the Education and Training Foundation (if a general enquiry about ITT and bursaries) helpline on 0300 303 1877. The Q&A at the end of this guidance may also be of assistance.
3. Providers are reminded that funds for bursaries are limited, so records and any updates need to be submitted promptly to NCTL so that funds can be released. Records received after the 15th of each month may be carried forward to the following month. Funding adjustments will be made to bursary payments for that month in these cases.
4. Providers are reminded of the need to ensure that all trainee records are accurate and complete. Where there is a lack of accurate or complete data, this will result in provider payments being delayed until the data is corrected and re-submitted.
5. The DfE will carry out a reconciliation exercise between the bursary payments and the actual trainee records. In the event of any variances, particularly with regard to unclassified degrees, DfE reserves the right to contact providers to request explanations of the variances and to seek further information. Providers who have paid bursaries to trainees who hold degrees that sit below 2:2 for trainees specialising in mathematics and below 2:1 for trainees specialising in English language will not be reimbursed for any expenditure and funding will be adjusted accordingly.

Annex A: Assessing UK academic qualifications

Honours and ordinary bachelor's degrees

1. The [Framework for Higher Education Qualifications in England, Wales and Northern Ireland \(FHEQ\)](#) sets out that someone who holds a bachelor's degree with honours will have:
 - i. “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:

 - ii. “will be able to evaluate evidence, arguments and assumptions, to reach sound judgements and to communicate them effectively”.
2. 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 fewer 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.
3. Ordinary bachelor's degrees are largely a taught degree programme with less specialisation or independent study involved and the outcome can sometimes be a licence to train in a particular area, 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.
4. 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 normally necessary for bursary eligibility (see above). Trainees in this position are advised to contact the Open University for advice.

Medical first degrees

5. 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 five years in length.

6. ITT providers may consider five-year degrees in medicine, dentistry, veterinary science and surgery as equivalent to a 2:1 degree for the award of a bursary. A first or distinction in an integrated master's medical degree can be considered equivalent of a first class degree for the purpose of awarding a bursary.
7. 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 qualifications are often called Bachelors of Medical Science (B Med Sci). ITT providers can consider these degrees equivalent to a 2:2 degree for the purpose of awarding a bursary.
8. As a number of award titles may be used in both categories of award, we advise ITT providers to check individual cases with the relevant awarding bodies before making a decision about awarding bursaries.

List of eligible academic qualifications

9. For the purpose of determining the bursary award, ITT providers should take the trainee's highest academic qualification that aligns with a bursary tier. [Figure 2](#) sets out the eligible academic qualifications and equivalent bursary award.

Highest qualification	Equivalence for bursary or scholarship award				
	First class degree	2:1 honours degree	2:2 honours degree	Other degree award	No equivalence
Doctoral degree ¹	✓				
Medical master's degree (distinction)	✓				
Master's degree ²		✓			

Figure 2: Equivalent qualifications for bursary award eligibility

¹ Honorary doctoral degrees are not recognised.

² These do not include the master's degree granted on application by the University of Oxford or Cambridge.

10. Aegrotats are degrees awarded if a candidate was unable to sit their final exams due to illness. ITT providers cannot consider these Aegrotat, non-honours or ordinary degrees as suitable equivalency for a bursary award.
11. 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.
12. ITT providers cannot consider a postgraduate certificate (PGCert) or diploma (PGDip) as suitable equivalency for a bursary award.

Doctoral and master's qualifications

13. Doctoral and master's level qualifications may include other UK qualifications deemed by the provider to have the same level of academic breadth and depth.
14. If an ITT provider uses a higher academic award, i.e. doctoral or master's, to award a higher bursary award to a trainee they must seek confirmation that the qualification was completed before the start of the ITT course. If the outcome is not yet known, the bursary award must be made based on the highest relevant academic award on the date training course started. If the trainee successfully gains the higher award a retrospective uplift can be applied. Please contact ITT.Funding@education.gov.uk for further guidance in these circumstances.

Master's degrees

15. The FHEQ describes master's degrees as separate from other postgraduate qualifications in their "increased intensity, complexity and density of study". Master's 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 master's degree should typically equate to one calendar year full-time.
16. These do not include the Master of Arts (MA) degrees which are granted, on application, by the Universities of Oxford and Cambridge, to graduates of these universities with a Bachelor of Arts (BA) degree. 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

17. Integrated master's degrees are undergraduate programmes extended by one year to allow 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 level.
18. 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 (Master of Physics) or MChem (Master 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.
19. Trainees who took an integrated master's but do not have a degree classification or pass/merit distinction can be considered for the higher bursary, but the provider will be required to demonstrate that the trainee is of high quality. Trainees who 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

20. 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 extends the forefront of a discipline, usually through original research". Professional doctoral programmes that may include a research component, but

which have a substantial taught element, usually lead to awards which include the name of the discipline in their title (EdD, 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 three calendar years full-time for a research-based doctoral degree although it may take up to five 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.

Annex B: Assessing Overseas Qualifications

Overseas degree equivalency table

1. When selecting trainees with overseas degrees, ITT providers should ensure that they comply with the ITT criteria. A Statement of Comparability can be obtained 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's, Master's or Doctorate level. However, the Statement of Comparability cannot be used to establish the classification of the trainee's degree; this has to be done either by using the [overseas degree equivalency table](#) produced by UK NARIC, or by making a professional assessment.
2. UK NARIC has produced an overseas degree equivalency table to support ITT providers in determining the appropriate level of bursary award. UK NARIC's study looked at all overseas qualifications comparable to British bachelor (honours) and British bachelor degree standard, and their equivalence to 1st class, 2:1 or 2:2 honours degrees. A summary of the methodology used to produce the table is available on [the same webpage](#).
3. UK NARIC produced the first version of the overseas degree equivalency table in 2011, which analysed qualifications from 160 countries. Given recent changes to education systems, particularly in Europe, NCTL commissioned UK NARIC to update the equivalency information for 41 countries. The updated overseas degree equivalency table was published in May 2015. The equivalency information for the 41 updated countries can be accessed using the Countries A-Z tabs. The information for all other countries, which was produced in 2011, can be found on the 'Country not listed' sheet.
4. The overseas degree equivalency table is intended as an advisory guide for ITT providers, and providers should use their professional judgement in determining eligibility. UK NARIC does not recommend applying the methodology or table in other contexts.

Qualifications not included in the equivalency table

5. It is important to note that many overseas qualifications sit either above or below British bachelor (honours) and British bachelor degree standard, and therefore will not be included in the data in the overseas degree equivalency table as they were outside of the scope of UK NARIC's study. ITT providers may wish to seek a Statement of Comparability from NARIC to verify the actual degree itself before making any judgements about bursary eligibility.

6. Overseas qualifications not equivalent to at least second class honours as supported by the overseas degree equivalency table are deemed equivalent to Ordinary or third class degrees, unless the provider makes an assessment that the individual's degree is equivalent to at least second class honours and is able to defend this.

Grading not included in the equivalency table

7. Where the trainee's first degree can be compared to British bachelor (honours) and British bachelor degree standard but there is no actual grading of the degree available, ITT providers may award a bursary providing they are satisfied that the trainee's degree is of the same depth and breadth as the bursary award would indicate. ITT providers are advised to seek a transcript of the trainee's degree or further evidence of the trainee's achievement.
8. Please contact the ITT Funding team at ITT.Funding@education.gov.uk if the data in the overseas degree equivalency table suggests that a grading should be available for the trainee's degree, but the trainee was not issued with a final grade.

Countries not included in the equivalency table

9. Where the overseas degree equivalency table does not include the country from where the trainee holds their degree, or the data refers to a 'case-by-case' assessment, ITT providers should contact the ITT Funding team at ITT.Funding@education.gov.uk.
10. ITT providers are reminded that they must hold full and transparent audit trails relating to bursary payments made to trainees with overseas degrees that are not identified in the overseas degree equivalency table.

Overseas master's and doctoral degrees

11. Trainees who hold overseas master's and doctoral degrees may be assessed for eligibility independently of the overseas degree equivalency table. ITT providers should obtain a Statement of Comparability from NARIC if necessary.
12. Where a trainee's degree can be compared to UK master's or doctorate level, these degrees should be treated as equivalent, and the appropriate bursary award should be awarded for that ITT subject as indicated in [Figure 1](#).
13. ITT providers should use their professional judgement in determining any bursary awards for overseas master's or doctoral degrees which are not equivalent to a UK master's or doctoral degree. They must be prepared to build a strong case for awarding a higher bursary award than their qualification would suggest.

14. In exceptional cases, trainees who hold overseas bachelor's, master's or doctoral degrees that all sit below British bachelor honours degree standard may be awarded a bursary if the provider is able to provide a strong business case backed up by a full audit trail for bursary eligibility.

Annex C: Frequently Asked Questions

Q. How will trainees find out about this scheme, what should I do if they want further information?

We will be working with all major partners and representative bodies on advertising the new bursary programmes, including through HE and FE routes. We expect and encourage providers to promote the bursary to eligible students on relevant programmes and prospective students considering relevant programmes. For more details:

- New trainees who have not made any arrangements with a specific ITT provider and want more information should contact the Education and Training Foundation helpline on 0300 303 1877.
- Trainees who already have places agreed with ITT providers should consult their provider about any entitlement to a bursary.
- All trainees seeking information on any aspect of student loan financial matters **MUST** contact the Student Loan Company via [this page](#).

Q. Does the value of the bursary depend on the class of degree held by the trainee?

Yes. This bursary scheme has been designed to acknowledge the academic achievements of the trainee and their potential to teach, with the top tier of bursary payments awarded to trainees with a 1st class degree; the second tier for those with a 2:1; a third (for mathematics only) for those awarded a 2:2 or equivalent (there will only be two tiers for English). The table below provides details of amounts that will be paid:

ITT Specialism	Degree Class	Degree Class	Degree Class
	1 st	2:1	2:2
Mathematics	£25,000	£25,000	£25,000
English	£9,000	£9,000	No bursary

Q. For graduates to attract a bursary to teach mathematics, does their degree have to be simply in mathematics, or is another related subject acceptable?

Ideally mathematics, or a joint degree with mathematics, or a degree such as physics or engineering, where the mathematics element is significant. But other degrees will be considered, subject to the ITT provider's judgement that the

applicant has the necessary underpinning knowledge, skills and capacity to teach mathematics to students from basic to GCSE and Level 3.

Q. For graduates to attract a bursary to teach English does their degree have to be English or will another subject be acceptable?

Ideally English language or a humanities degree with a significant English component. But other degrees will be considered subject to the ITT provider's judgement that the applicant has the necessary underpinning knowledge, skills and capacity to teach English language to students from basic to GCSE level. The fuller bursary guidance will help in determining whether a degree is acceptable.

Q. Will the bursary have an impact on any state benefits I receive?

Although bursaries are non-taxable they can be counted as capital and as such may have an impact on means-tested state benefits. Individuals are strongly advised to contact the Benefit Service to find out if the bursary will affect their state benefits.

Q. Does the English bursary include those proposing to teach ESOL?

No, the bursary is to support those intending to teach English from basic to GCSE level. However, if a trainee intends to teach English and follows a combined specialist ITT programme in English: Literacy and ESOL, this will be in scope of the bursary.

Q. Will bursaries be available to those already employed in the sector?

A bursary will only be considered for applicants who do not hold a full teaching qualification, for example PGCE, DTLLS, DET, QTS or QTLS.

Q. I have a part-time paid teaching post, will I be eligible to apply for a bursary?

Trainees who are funding their own training (in their own time) to achieve a full level 5 or above teaching qualification and who undertake paid teaching, whether part-time or on a sessional basis, in a school or institution other than the one at which they are being trained may be eligible for a bursary subject to their meeting the other eligibility conditions. The ITT provider must be assured that the paid teaching commitment will not interfere with attendance at the ITT course and the carrying out of the required teaching practice. **NB The paid teaching commitment may not be used as the required teaching practice.**

Q. Will bursaries be available to those who previously worked in the sector, but want to return to teach mathematics or English?

(a) If a trainee left the sector and wants to return, and doesn't already hold QTS/QTLS, they may be eligible for a bursary so long as they meet all other criteria;

(b) If a trainee already holds QTS/QTLS, they will not be eligible for a bursary.

Note: scenario (a) may apply if a trainee left before fulfilling the requirements to become qualified that were imposed under 2007 regulations.

Q. Will the bursary be available to those who wish to study on a part-time basis?

Yes, but only for those studying pre-service for a specialist Diploma in Education and Training. This will not apply to those studying in-service.

Q. How do trainees apply for a bursary?

If a trainee is accepted onto an ITT course that attracts a bursary they will automatically qualify and will not need to apply separately. The trainee must be an 'eligible' student for the provision of UK student support and there must be sufficient funds available as the bursaries are paid on a "first come, first served" basis.

Q. What is the time scale for applications?

Providers should make NCTL aware of eligible trainees as soon as possible. Successful applications will be processed as speedily as possible and any outstanding monthly payments will be paid retrospectively. Failure to complete the application form correctly will delay payment.

Q. Will a trainee be entitled to arrears if they decide to switch and study a specialism half way through the course?

No. Bursary payments will be start from the point that a trainee switches and will continue until the end of the course. Arrears will not be calculated.

Q. Is there an appeals process for a trainee refused a bursary?

If a trainee is unhappy with the decision and it relates to acceptance on a course, they should approach their provider. If the complaint is about the policy or availability of bursary funds, they can write to DfE at FE.workforceincentives@education.gov.uk

Q. Who is the bursary paid to – the trainee or the ITT provider?

The bursary will be paid to the ITT provider who will pay the trainee on a monthly basis.

Q. Who will administer the bursary scheme?

The bursary scheme will be administered by the National College for Teaching and Leadership (NCTL).

Q. Is there any funding to support providers' administration of the bursaries?

No.

Q. Will trainees be able to apply for student support loans?

Yes - being eligible for a student support is a pre-cursor for receiving a bursary. The ITT provider must be approved by and meet the current requirements of the Student Loans Company.

Q. Will trainees have to repay their bursary if they do not secure a job teaching in their specialism?

There is an expectation that trainees will seek a teaching post in the FE sector in England, but bursaries do not have to be repaid if the trainee does not secure a teaching job.

Q. Is there specific guidance for providers about the selection of trainees? Having a first class degree is no guarantee of the ability to be able to teach the subject or to teach students with special educational needs.

It is the ITT provider's responsibility to assure themselves of the capability of the trainee. ITT providers will apply their own entry criteria that they should already be using to determine the suitability of an applicant to pursue the course and for assessing the capacity and capability of the trainee to become a teacher of English or mathematics. By signing the trainee's bursary application the provider is confirming that this process been properly carried out.

Q. Are the bursaries for those intending to take specialist English or mathematics teaching qualifications, or generic teaching qualifications?

The bursaries are aimed at trainees undertaking training with a specialism in either English or mathematics who intend to teach in these areas. Trainees on generic programmes may be entitled to bursaries if they follow specialist pathways through the optional units and a combination of course content and existing qualifications equips them to teach English or mathematics at basic to GCSE and Level 3. It will be for providers to make judgements about this, and the extent to which particular trainees may require additional specialist training. Mathematics courses must cover the full specialisms and offer work experience in an appropriate environment as set out in the QCF framework.

Q. Does that mean that a trainee on the 120 credit, level 5 Diploma in Education and Training is not eligible for a bursary?

Not necessarily. The two main courses that clearly attract bursaries are the Level 5 DET including a specialist pathway (120 credits) and the Level 5 integrated specialist diploma (120 credits). Both of these cover the training for teachers in English or mathematics to the standard/level we are expecting. However, if a trainee enrolls on the Level 5 diploma (120 credits) and the provider is absolutely confident that the trainee has prior qualifications and exceptional experience or knowledge that a generic course can build on to equip them to the same standards as the other two courses - perhaps by using and tailoring part of the (undefined) 45 optional credits to enhance the trainee's knowledge/skills in English or mathematics; and effectively using the teaching practice element for the subject specialism – then a bursary can be paid. The provider should assess carefully the trainee's prior learning/experience and must be absolutely confident that the trainee can deliver to the standards/levels expected at the end of the course. If that isn't the case, the trainee should consider the DET with specialist pathway, or the integrated specialist DET, if they wish to receive a bursary.

Q. Will there be funding to support teachers who already have full ITT qualification and wish to undertake the 45 credit stand-alone subject specialist English and mathematics qualification?

No, the bursary is only available for the full 120 credit generic and integrated specialist ITT qualification. A mathematics CPD course is available to existing mathematics teachers to enable them to teach to the GCSE standard. An English CPD course is also available to existing English teachers to enable them to teach to the GCSE standard.

Q. When can trainees enrol on courses that attract bursaries?

Providers publish their own prospectuses showing course enrolment dates and determine enrolment arrangements. Trainees should decide which of these best suits their needs.

Q. How long is the bursary paid for?

The bursary is fixed for the duration of the trainee's programme.

Q. Does a provider need to undertake any safeguarding checks for accepting a trainee and paying a bursary?

Providers should follow their own procedures for assessing the suitability of a trainee and accepting them on a course. As teaching is subject to the vetting and barring scheme, this will need to be considered if a candidate divulges they have a record that may debar them from a future career in teaching.

Q. What happens if a trainee withdraws from the course?

Bursaries should not be paid to any trainee before they start the course. If a trainee starts and then withdraws, the provider must suspend bursary payments immediately and ensure records are updated to reflect the withdrawal. Trainees are entitled to be paid a bursary up to the point they withdraw.

Q. Does a trainee have to repay the bursary if they leave early?

If the trainee leaves the course we will not expect any repayment of the bursary, unless the bursary has been paid in error.

Q. Is there deadline to receive bursary applications?

Funding is limited and there is likely to be high demand. ITT providers are encouraged to make early application on behalf of their students.

Q. Who decides if I need to undertake a mathematics SKE programme?

It's for the provider to decide if a potential ITT trainee needs to undertake an SKE programme in order to start or successfully complete a mathematics ITT

course. The provider and the trainee will agree what's needed and best ways of meeting it.

Q. Who pays for the SKE programme?

Money to fund SKE programmes will be released by NCTL to the ITT provider. The provider will be responsible for using this to pay any SKE programme costs, and any SKE bursary to the trainee.

Q. Where can I find out more details about mathematics SKE?

Separate guidance has been produced on the SKE scheme. This provides all the information for both providers and trainees on both the programme and separate SKE bursaries.

Further Qualification Questions

Non-honours UK degrees

Q: I have an ordinary degree but I trained to be a doctor. Will I be eligible?

The Bachelors of Medicine, Dentistry, Veterinary Science and Surgery may all be eligible for the bursary at 2:1 level providing that the trainee completed the whole degree. Exit qualifications after three years (usually Bachelors of Medical Science) will be eligible for the 2:2 bursary. Trainees will be expected to provide a transcript of their final degree and score.

Q My applicant does not hold a degree of a UK university, but does have two Accountancy qualifications and a one-year Chartered Association of Certified Accountants certificate. Would they be eligible for the bursary?

If a trainee holds these professional/vocational qualifications, the provider will need to examine, and demonstrate that they have examined, the qualification in more detail and be confident that it covers that same academic breadth and depth of a first undergraduate degree at honours level. In addition to this it is likely that this may get picked up during evaluation *if* the provider is unable to provide relevant evidence that they believe the qualification is equivalent to at

least 2nd class honours. It is therefore advisable to keep transparent audit trails relating to any decisions.

You may wish to consult the [QAA website](#) to find out at which level they think it would sit on the Framework of Higher Education Qualifications. It will need to sit at Level 6, and would need to be deemed equivalent to 2nd class honours and 360 credits to be considered for bursary eligibility.

Q. I did an Open University degree worth 300 credits. Can this be considered for bursary eligibility?

The Open University's Open degree can be awarded with or without honours. Those without honours consist of 300 credits and would therefore not be eligible for bursaries in their own right. Those that consist of 360 credits are honours degrees, and will be eligible for the bursary providing that the trainee meets the eligibility requirements. Trainees with Open degrees of 300 credits may be able to study a further 60 credit module with the Open University to convert the degree 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.

Q: Will trainees who hold postgraduate qualifications i.e. PhD and Masters qualifications qualify?

Yes, provided the qualification is one that fully meets the requirements and all other selection criteria are met.

Q: Can trainees with 3rds still get bursaries if they have a Masters or PhD?

Yes, the scheme looks at a trainee's most relevant academic qualification when assessing eligibility for bursaries. However the trainee would have to be studying an eligible ITT subject.

Q: Can trainees with 3rds and extensive professional experience still get a bursary?

No, as the minimum requirement for a bursary is 2:1 and above to train to teach English and 2:2 for mathematics. However, they may still be eligible for the package of grants, fee loans and maintenance loans available from the

Student Loans Company. Trainees with a 3rd class or equivalent degree in relevant subject seeking to teach mathematics may be eligible provided they hold a Grade B or better in A level mathematics.

Q: What if a trainee has 2 first undergraduate degrees and one is a 3rd?

The degree with the highest outcome should be used for assessing bursary eligibility.

Eligibility for overseas trainees

Q: Is a bursary available to overseas students?

Where the trainee has a degree from outside the UK, providers should consult the bursary guidance for further advice on deciding whether an overseas degree has equivalence to UK degree classification, and the process for checking. A trainee must then fulfil all other selection criteria.

Q: I am not an EU national. I have been studying in the UK for the past 5 years and have been paying my tuition fees at overseas rates. I would appreciate if you could let me know if I am eligible for the bursaries, otherwise if there are any other funding available for my current status. Other advice you could give would be helpful, too.

If you do not have 'home' or 'EU' status, i.e. you don't meet the residency criteria as the purpose of your stay in the UK over the last three years has been to receive full-time education, then you will most likely not be eligible for the bursary. You may wish to verify this though with the [UK Council for International Student Affairs](#), to determine your fee status.



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