



Department
for Education

Golden Hello guidance for local authorities

1 April 2018 to 30 September 2019

October 2019

Version 1.1

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Change log

Version	Published date	Changes made
1.1	October 2019	Confirmation of the deadline for reimbursement claims on pages 5, 6, 16 and 17

1. Introduction

The golden hello was a financial incentive for teachers of priority subjects in a maintained secondary school (including middle-deemed secondary), a maintained or non-maintained special school. It was only available to teachers who trained through a postgraduate initial teacher training (ITT) course leading to qualified teacher status (QTS). In order to be eligible for payment of the golden hello incentive, teachers must meet the training, teaching and application criteria.

This document outlines the eligibility criteria that must be met in order to claim the incentive and explains how the Department for Education (DfE) will reimburse local education authorities (LEAs) for the golden hello scheme from 1 April 2018 to 30 September 2019. The eligibility criteria guidance is used to assess all DfE golden hello applications and should be read by teachers applying for a golden hello, and administrators responsible for assessing claims. This document relates to eligible postgraduate initial teacher training (ITT) courses starting between 1 August 2000 and 31 July 2011.

Eligible teachers must submit their claim to an employing LEA **on or before 30 September 2019**. All reimbursement claims from LEAs must be received by DfE **on or before 30 November 2019**.

Any claims submitted after this date will only be accepted under exceptional circumstances, which DfE will assess on a case by case basis.

ITT providers should provide eligible teachers with a golden hello application form upon completion of their ITT. Providers should ensure that only eligible teachers receive an application form.

The DfE offers LEAs funding for the reimbursement of golden hello expenditure incurred during the financial year. The funding will reimburse costs relating to:

- the gross incentive amounts in accordance with the subject specific rates for that teachers qualifying year, and
- any connected employers Earnings Related National Insurance Contributions (guidance on ERNIC can be sourced from HMRC <http://www.hmrc.gov.uk/rates/nic.htm>).

The DfE announced the closure of the golden hello scheme for all trainees starting their initial teacher training (ITT) in the academic year 2011/12 and beyond.

Trainees who started their postgraduate ITT course prior to 1 August 2011 must submit their claim to an employing LEA on or before 30 September 2019. All reimbursement claims from LEAs must be received by DfE on or before 30 November 2019.

Any claims submitted after this date will only be accepted under exceptional circumstances, which DfE will assess on a case by case basis.

2. Eligibility

In order to be eligible to apply for a golden hello incentive, a teacher must submit their application to an employing LEA **on or before 30 September 2019**, and the application must comply with all of the following criteria:

- a) Training eligibility criteria: relating to the type of ITT undertaken;
- b) Teaching eligibility criteria: relating to the type of teaching post occupied; and
- c) Application eligibility criteria: relating to the timing of the application.

If any part of these eligibility criteria is not satisfied, the teacher is not eligible to receive a golden hello. Where teachers do not satisfy an element of the teaching eligibility in their original application, they may reapply for a golden hello at a future date. This is provided that they fully satisfy the eligibility criteria, including the application eligibility, at the time of a subsequent application.

Training (ITT) eligibility criteria

- a) The golden hello is only available to teachers who successfully completed a postgraduate ITT course, leading to the award of QTS in England. Teachers who undertook equivalent postgraduate courses in Wales, Scotland, Northern Ireland or the European Union (EU) may also be eligible for the golden hello as long as they satisfy the criteria set out in the 'payment rates' section.
- b) Teachers who gained QTS through an undergraduate or employment-based ITT route do not qualify for a golden hello. Employment-based ITT routes include the Graduate and Registered Teacher Programmes, the Overseas Trained Teacher Programme, the Teach First Programme and School Direct (salaried).
- c) The teacher must have taken an ITT course that covered teaching either, or both of, the 11–14 and 14–16 age ranges in an eligible subject.

Teaching eligibility criteria

- a) Eligible teachers must be a qualified school teacher and hold QTS
- b) Eligible teachers must have successfully completed their induction. Visit <https://www.gov.uk/government/publications/induction-for-newly-qualified-teachers-nqts> for further details on induction.
- c) Eligible teachers must be employed as a qualified schoolteacher in England in:
 - a maintained secondary school (including middle-deemed secondary); and
 - a maintained or non-maintained special school (see www.nasschools.org.uk to identify status).

- d) Teachers in independent schools and sixth form colleges are not eligible for the golden hello.
- e) After a teacher has completed their NQT induction, they must have either a permanent employment contract or a fixed-term contract of at least one term's duration. Where the teacher has a permanent contract, they will not be eligible for the golden hello if notice to terminate the contract is given before the golden hello payment is received.
- f) The teaching post held by the teacher must contract them to teach at least 50% of their teaching time in the subject they specialised in during ITT. The teacher must continue to be employed in an eligible role until receipt of the golden hello and must remain in post for at least the period from application to payment. Applicants who leave before payment of the golden hello will forfeit their eligibility.
- g) Supply teachers are eligible for golden hellos on the same terms as permanent teachers, provided that their contract with a school or LEA is for at least one term. Supply teachers employed by private agencies are not eligible.

Application eligibility criteria

- a) Teachers must ensure their applications are made to the LEA within 12 months of completing their NQT induction, or equivalent, if induction is undertaken in Northern Ireland, Scotland or Wales. DfE will not reimburse the LEA for a golden hello claim after the 12 month induction completion period has passed.
- b) This application time is extendable to 24 months in case of pregnancy or full-time caring responsibilities, and for any period during which a person is certified by a doctor as medically unfit to work as a teacher. LEAs should make a request for an extension on behalf of the teacher by email to DfE.
- c) Applicants must not have previously received a DfE golden hello in England or the equivalent in Wales.

3. Payment rates

The rate payable for eligible teachers is dependent upon the academic year the teacher started their ITT course and the secondary subject in which the trainee specialises. These rates are before tax, National Insurance and student loan repayment if applicable.

Teachers who undertook equivalent postgraduate ITT courses in Wales, Scotland, Northern Ireland or the EU may also be eligible for the golden hello as long as they satisfy the eligibility criteria set out in this document.

Golden hellos are a non-consolidated bonus and are subject to income tax and National Insurance. They are regarded by HM Revenue and Customs as taxable income and teachers repaying student loans might have their repayments increased accordingly.

Teachers who are claiming state benefit (working tax credits etc.) are advised to discuss with their local Jobcentre Plus office the impact that the golden hello may have on such benefits.

ITT courses that offer joint subject areas can be considered, but at least 50 percent of the course must be in one of the subjects listed above.

For the purpose of golden hellos, all academic years begin on 1 August and end on 31 July. To be eligible, teachers must comply with the other eligibility criteria set out in this document.

Figures 1 and 2 summarise the golden hello amounts that eligible teachers may apply for based on the academic year of the ITT course and the subject in which they trained and subsequently teach.

Secondary subject specialism (trained in and taught)	ITT AY2010/11	ITT AY2009/10	ITT AY2008/09
Mathematics	£5,000	£5,000	£5,000
Science	£5,000	£5,000	£5,000
Applied Science	£5,000	£5,000	£5,000
Applied ICT	£2,500	£2,500	£2,500
Design and Technology	£2,500	£2,500	£2,500
Engineering	£2,500	£2,500	£2,500
ICT	£2,500	£2,500	£2,500
Manufacturing	£2,500	£2,500	£2,500
Modern Languages	£2,500	£2,500	£2,500
Music	£2,500	£2,500	£2,500
Religious Education	£2,500	£2,500	£2,500
All other subjects	£0	£0	£0

Figure 1: Payment rates relating to the academic year the teacher started their ITT course (2008/09 to 2010/11)

Secondary subject specialism (trained in and taught)	ITT AY2006/07 and AY2007/08	ITT AY2005/06	ITT AY2000/01 to AY2004/05
Mathematics	£5,000	£5,000	£4,000
Science	£5,000	£5,000	£4,000
Applied science	£5,000	£5,000	£4,000
Applied ICT	£2,500	£4,000	£4,000
Design and technology	£2,500	£4,000	£4,000
Engineering	£2,500	£4,000	£4,000
English	£2,500	£4,000	£4,000
ICT	£2,500	£4,000	£4,000
Manufacturing	£2,500	£4,000	£4,000
Modern languages	£2,500	£4,000	£4,000
Drama, dance and performing arts	£2,500	£4,000	£4,000
Music	£2,500	£0	£0
Religious Education	£2,500	£0	£0
Other subjects not listed above	£0	£0	£0

Figure 2: Payment rates relating to the academic year the teacher started their ITT course (2000/01 to 2007/08)

Reciprocal agreements with Wales

There is a reciprocal agreement between England and Wales for the golden hello, known as the teaching grant in Wales. The golden hello/teaching grant will be payable to eligible teachers either in Wales or in England, but not in both. The eligibility criterion is that of the receiving country i.e. the country in which you are teaching when you become eligible for payment. **Please note that 2010/11 was the last academic year that teaching grants/golden hello's formed part of the ITT incentive support for trainees.**

The teaching grants available in Wales for eligible trainees on postgraduate ITT courses for **AY 2010/11** are as follows:

a) £5,000 Teaching Grant

- Maths;
- Chemistry; and
- Physics.

b) £2,500 Teaching Grant

- Information and Communication Technology;
- Design and Technology; and
- Welsh.

Please note that general/combined science, biology, modern languages, music and religious education do not qualify for the teaching grant. Payments will not be made by the Welsh Government for any subjects that are not listed above.

Eligible teachers in Wales will need to send their application form with a photocopy of their induction certificate to:

Initial Teacher Training Branch
Higher Education Division
Department for Education and Skills
Welsh Government
Cathays Park
CARDIFF
CF10 3NQ

Teachers who trained on a postgraduate ITT course in Wales may be eligible for a golden hello from the DfE after their first year in a school in England if they satisfy all the eligibility criteria as set out in this document.

Eligible teachers working in England will need to apply to the LEA responsible for their payroll.

For teachers who started their ITT course prior to academic year 2010/11, trained in England and satisfy the eligibility criteria as set out in this document will be able to apply to the Welsh Government if they take up an eligible post in a maintained school in Wales. The golden hello amount will be dependent on the eligibility criteria set out previously. Eligible teachers in Wales will need to send their application form to:

Initial Teacher Training Branch
Higher Education Division
Department for Education and Skills
Welsh Government
Cathays Park
CARDIFF
CF10 3NQ

Do not submit your claim form until you have actually started work in your eligible post. If you have any queries or would like advice from the Welsh Government please email teachingenquiries@wales.gsi.gov.uk. You can view more information on the teaching grant in Wales online [here](#).

Applicants who trained in Scotland and Northern Ireland

Teachers who trained in Scotland or Northern Ireland on a postgraduate ITT course starting in AY2010/11 may be eligible for a golden hello. These teachers are subject to the same eligibility criteria as those trained in England, outlined in this guidance document.

Eligible teachers will need to apply to the LEA responsible for their payroll. The LEA must be satisfied that the applicant meets the eligibility criteria set out in this document. Usually the teacher will need to provide the LEA with information on their teaching qualification and induction (or the equivalent), their QTS certificate, and written confirmation of their current contract.

EU applicants

Under European Community law, people who have teaching qualifications obtained elsewhere in the European Economic Area that are recognised as equivalent to QTS are entitled to receive a DFE golden hello on the same basis as English-trained teachers. This is provided that they obtained their qualifications to teach the eligible subject in line with the criteria.

Teachers, who believe they are eligible under these conditions, need to apply to their LEA. However, as the teacher will not have undertaken their training in England they will not have an application form. Instead they will need to provide their LEA with all the information required to make an assessment. Usually the teacher will need to provide copies of their teaching qualification, their QTS certificate and written confirmation of their

current contract. EU applicants must apply for the golden hello within 12 months of receiving QTS.

The impact of the result of the EU referendum is not yet known and any changes to the above criteria will be updated here.

4. Process of claiming

Before the teacher achieves QTS

- The teacher completes their ITT course and is provided with an application form from their ITT provider. Teachers who require a copy of this should contact their ITT provider. DfE are not able to provide teachers with a copy of the application form; and
- The ITT provider completes their ITT provider section of the form prior to giving this to the teacher – this section confirms the ITT eligibility criterion.

After the teacher achieves QTS

- The teacher completes their newly qualified teacher (NQT) induction;
- The teacher obtains a teaching post in an eligible school, with either a permanent or a fixed-term contract of at least one term's duration;
- The teacher completes Part 3 (Applicants personal statement) of the golden hello application form and submits the form to their employing school;
- The employing school signs off their teaching eligibility before sending it to the LEA for assessment and payment; and
- The LEA submits the pro-form to the DfE in the next claim period via the following email address and in line with the guidance outlined within this document:
TA.LAFUNDING@education.gov.uk.

5. Payments and financial governance

Outline

The reporting and payment arrangements for the period 1 April 2018 to 30 September 2019 are below and include the DfE's expectations of governance, internal control and audit.

This is supported by the terms and conditions in [Section 6](#).

Claim periods and payments

At the end of each claim period, LEAs are required to complete and return a golden hello reimbursement claim form, which are available online on [GOV.UK](#).

The completed form should detail the golden hello expenditure incurred during that period. Deadlines for submission are detailed below:

- Period 1: Thursday 31 May 2018;
- Period 2: Wednesday 31 October 2018;
- Period 3: Thursday 28 February 2019;
- Period 4: Friday 31 May 2019; and
- Period 5: Monday 30 September 2019.

All reimbursement claims must be received by DfE **on or before 30 November 2019**. If an LEA makes a Golden Hello payment after 30 September 2019, it should submit its reimbursement claim immediately to DfE.

Financial governance

The claim periods serve to verify that the expenditure incurred by LEAs has been for eligible activities only, as outlined in DfE documentation.

As such, they must be signed by the Chief Finance Officer (in accordance with his/her responsibilities under section 151 of the Local Government Act 1972).

Submitting claims

All claims must be transferred securely in order to comply with the Data Protection Act 1998.

The Data Protection Act does not consider the information to be collected in these returns as 'personal information'. This is because it does not link one or more identifiable living

persons with information about them whose release would put them at significant risk of harm or distress.

We consider the risk manageable and limited in transferring the claim information by email, using the approved form available on the DfE website. As such the DfE does not require claim information to be encrypted by the sender.

Submissions should consist of:

- an original claim sheet in its Excel form; and
- a PDF copy of the same sheet signed by the LA Section 151 Manager.

When to claim

Claims by LEAs should be sent to the DfE at the end of each claim period up to 30 September 2019. After this claim period, claims should be submitted immediately to DfE up to and including 30 November 2019.

The DfE will not make a payment to any claim, where:

- the application was received by the employing LEA after 30 September 2019;
- the LEA has claimed at the incorrect subject rate for that teacher;
- the reimbursement claim has been made in advance of the teacher being paid by the employer;
- the teacher is not currently employed by the LEA; and
- the reimbursement claim is not received by DfE on or before 30 November 2019.

How to claim

To make a claim the LEA should:

- read the guidance on the DfE website for the golden hello initiative;
- complete the template claim form; and
- attach the claim form, a signed PDF copy of that form to an email and send to TA.lafunding@education.gov.uk.

The LEA should keep the associated claim forms completed by the teacher to meet any potential audit requests from the DfE or HMRC.

As this is classed as financial paperwork, LEAs should retain this paperwork as outlined in the HMRC advice note to businesses. This is available at <http://www.hmrc.gov.uk/factsheet/record-keeping.pdf>

6. Terms and conditions

Use of the funds

The funds must be used to cover the declared direct or indirect payment of golden hello incentives to eligible teachers and any associated Employer's National Insurance contributions.

Management of the funds

The LEA must have appropriate and effective financial systems in place for the management, accounting and auditing of the DfE funding.

Reimbursements will be made by the DfE in accordance with the arrangements detailed in this document. The DfE reserves the right to change these arrangements.

It is the LEAs responsibility to ensure that the DfE holds both correct bank and contact details for the LEA.

Contact and reporting requirements

The DfE must have a named contact for all matters relating to the funding, and be informed immediately of changes to the named contact.

The LEA shall respond promptly to reasonable requests for data and information by the DfE. The LEA will be responsible for the quality of this data.

The LEA will provide the DfE with claims which will detail the expenditure that it has incurred and the expenditure it expects to incur in the remainder of the financial year where possible. The DfE will provide the LEA with a formal pro-forma to complete for this purpose. The LEA will ensure that its completed forms comply with the requirements set out in this manual and the form itself.

All reported expenditure will be verified by the LA's Section 151 Officer.

The DfE reserves the right to audit all claims and/or require the LEA to submit independently audited end-of-year returns.

Repayment and withholding of payments

Funding is dependent on the golden hello scheme remaining in operation.

The DfE reserves the right to withhold all, or part, of the funding if the terms and conditions of funding are not met.

The DfE will reimburse the LEA in arrears for expenditure the LEA has incurred. The DfE will not make payments in advance of recognised liability.

The DfE may suspend the payment of funds, either in whole or in part and for any appropriate period if, in the opinion, it is appropriate and reasonable to do so to safeguard public funds.

Annex A: Contact and Useful Information

Contact information for golden hello at DfE

- Funding Delivery Team: ITT.Funding@education.gov.uk
- Claims mail box: TA.lafunding@education.gov.uk

Useful Links

- Guidance on ERNIC rates: <http://www.hmrc.gov.uk/rates/nic.htm>
- Notes on financial record keeping: <http://www.hmrc.gov.uk/factsheet/record-keeping.pdf>

Annex B: Glossary

- ERNIC: Employers Related National Insurance
- GH: Golden Hello
- HMRC: Her Majesty's Revenue and Customs
- NI: National Insurance

Annex C: Changes in claims systems and processes from 2015-16

Annual Section 6 Local Authority declaration no longer required.



Department
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