



National College for  
Teaching & Leadership

# **School Direct Funding Manual**

**Academic Year 2015 to 2016 (Version 2.0)**

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# 1. Introduction

- 1.1 This manual is a guide to the funding delivery of School Direct for both schools and Initial Teacher Training (ITT) providers. It is a live document and the information and guidance contained is relevant to trainees starting in academic year (AY) 2015/16 only. The guidance relates to all School Direct places leading to the award of Qualified Teacher Status (QTS).
- 1.2 Any changes to this manual will be communicated to lead schools and ITT providers by email and through the School Direct Bulletin and the ITT provider update. All changes made will be logged at the back of the manual.

## School Direct lead school and ITT provider roles

- 1.3 We encourage schools to work in partnerships led by outstanding schools. Lead schools must be Local Authority (LA) maintained (primary or secondary), a special school, a Pupil Referral Unit (PRU), an Academy, a Free School, a Private School that is a designated Teaching School or a Sixth Form College. Further details can be found at our [School Direct webpages](#).
- 1.4 The lead school is the agreed point of contact for the partnership and holds the allocations from the NCTL for the partnership's School Direct training places. It is responsible for communications across the partnership to and from the NCTL and between each participating member of the partnership. The School Direct lead school is responsible for placing trainees across the partnership and notifying the ITT provider of the location of trainees. The lead school is also responsible for the distribution of the training and salary grant funding for School Direct (salaried) programmes.
- 1.5 The accredited provider is accountable for all aspects of the provision – recruitment, selection, training, trainee assessment and recommendation for the award of qualified teacher status (QTS). The whole provision must therefore be compliant with the Secretary of State's [ITT criteria](#) and align with the [2014 Ofsted Framework](#) for the inspection of ITT. The accredited ITT provider is formally recognised and accredited by the Department for Education in this role. The ITT provider should be a full member of the School Direct partnership and be involved in and share responsibilities for the aspects of provision listed above, in addition to any agreed role in programme design delivery as set out in the partnership agreement.
- 1.6 When delivering training programmes, the lead school and accredited provider must remember the importance of ensuring trainees experience the full breadth of training required as stipulated in the [ITT criteria supporting advice](#). Specifically,

paragraph C2.4 which states that “All accredited ITT providers must ensure that each trainee teacher has taught in at least two schools.”

## School Direct (tuition fee)

- 1.7 School Direct (tuition fee) is open to all high quality graduates. The trainee is deemed to be a student of higher education for the period of training. The course is funded by tuition fees paid by the trainee, either directly or with a Student Loans Company (SLC) loan. Trainees may be eligible to receive training bursaries and scholarships (see the funding page).
- 1.8 ITT providers will receive the tuition fee from SLC and the training bursary funding from NCTL (on behalf of the eligible trainee).
- 1.9 The uplift previously paid to schools with trainees spending more than 50% of their time in a school or schools with more than 35% of pupils eligible for free school meals is **not** available from AY 2015/16.

## School Direct (salaried)

- 1.10 School Direct (salaried) is primarily for graduates with three or more years' work experience. However, schools can decide to accept applications from people with less work experience to attract high quality candidates in hard to fill subjects such as mathematics, physics, chemistry, languages and computing.
- 1.11 A school within the School Direct partnership must employ the trainee for the duration of the training. The trainee must be employed as an unqualified teacher and need not be in a 'supernumerary' position (i.e. in addition to your regular teaching staff numbers). The school is responsible for meeting all employment responsibilities. Trainees in LA maintained schools/PRUs must be paid at least the minimum of the unqualified teacher pay scale. Trainees in academies and free schools must be paid at an advertised rate.
- 1.12 NCTL may pay training and salary grant funding to schools depending on the ITT subject they have trainees training in. NCTL provides funding to lead schools to cover training costs to achieve qualified teacher status (QTS) and subsidise the trainee's salary.
- 1.13 Schools that confirm with NCTL that they are providing a salary of at least £21,000 nationally, £22,000 in London fringe, £24,000 in outer London or £25,000 in inner London will receive an additional £6,000 grant-uplift to support the increased salary for mathematics, physics and computing trainees. To claim this uplift, lead schools will need to provide a [small data return](#) through the schools [data](#)

[management system](#) to confirm recruitment and provide assurance to NCTL that they are paying the higher salary.

- 1.14 Lead schools that are allocated and recruit to additional School Direct (salaried) places in eligible subjects after 5 February 2015 will attract an additional £5,000 grant funding. This funding is only available to lead schools that held an allocation of salaried places in the subject for which they are requesting an additional place on 5 February 2015. The list of eligible subjects and the rates of funding can be found in Annex C. The additional £5,000 will be paid when trainee registration data from the ITT provider is matched against our record of allocated places; we expect this exercise to be completed in December 2015.
- 1.15 The £5,000 additional grant funding is not available for places allocated under the Maths and Physics Chairs programme.
- 1.16 The uplift previously paid to schools with trainees spending more than 50% of their time in a school or schools with more than 35% of pupils eligible for free school meals is **not** available from AY 2015/16.
- 1.17 School direct (salaried) trainees will not need to pay fees to cover the cost of the QTS award. The trainee will not be eligible for a training bursary or student finance. However, schools and providers should ensure the candidate is aware of any expectation to pay for any additional academic qualifications, such as PGCE.
- 1.18 As the trainee is employed, schools should decide in collaboration with their ITT providers what teaching duties the trainee is able to take on. The ITT criteria specify the amount of training activity that the trainee must undertake each year in schools, and the maximum amount of teaching duties that they should be expected to perform.

## **Lead school and partner school eligibility for School Direct places**

- 1.19 Private schools cannot be lead schools unless they are also designated teaching schools. In these cases there is an expectation that any places requested should benefit a wider partnership that includes state maintained schools, and that school direct (salaried) trainees should be employed in a state maintained school in the partnership rather than in the private school after training. A private school can be involved in School Direct as a partner school. A private school should not be the principal training school; however it may provide modular training or offer a secondary placement if it is deemed a valuable, contrasting learning experience for a trainee.
- 1.20 The lead school cannot be a school in special measures. A lead school that is placed in special measures after the allocation of places will need to i) find an

alternative school to assume the role of lead school if it has recruited trainees, or ii) relinquish its allocated places. In the case of the former, the original lead school may remain in the partnership. A lead school which is graded “requires improvement” or “notice to improve” after the allocation of places does not have to relinquish the status of lead school.

- 1.21 Partner schools in special measures should not recruit and therefore employ School Direct (salaried) trainees.
- 1.22 Partner schools, including schools that were previously a lead school, that go into special measures after a salaried trainee’s employment has started, they may remain with the school provided that:
- the lead school and the ITT provider judge that any risks to the quality of provision are manageable;
  - another school within the partnership is able to provide additional support that is necessary; and
  - the partnership agreement is amended to reflect increased support, monitoring and revisions to the Individual Training Plan (ITP).

The school in question must not employ any additional salaried trainees while they remain in special measures.

- 1.23 Partner schools in special measures should only be as a placement for School Direct (tuition fee) trainees if the lead school and the accredited ITT provider are confident that the trainee will not be disadvantaged by the school experience, and this judgement will need to be kept under close review. In some cases, the ITT provider and lead school may need to provide additional support for trainees, or ask another partner school to provide an alternative placement.
- 1.24 A lead school will not be disadvantaged if it works in partnership with schools graded “requires improvement” or “inadequate”. These schools are able to offer trainee placements and contribute to the planning and delivery of School Direct courses within a school partnership.

## **Which ITT providers can be involved in School Direct?**

- 1.25 Schools can choose to work with any ITT provider that has an Ofsted rating of “good” or “outstanding” for overall effectiveness and that has been accredited by NCTL to provide ITT courses leading to qualified teacher status (QTS) i.e. HEI (university), SCITT (provider of school-centered Initial Teacher Training) or an EBITT (provider of employment-based Initial Teacher Training). If the lead school is accredited as an ITT provider it can act as both the lead school and the provider. EBITT providers cannot deliver fee-funded School Direct programmes.

- 1.26 You can find the Ofsted inspection grades of accredited ITT providers by following this [link](#).

## Changing ITT providers, School Direct Partnerships or School Direct Route

- 1.27 NCTL does not permit School Direct lead schools to change the ratifying ITT provider once a school has requested places, except in exceptional circumstances that must be agreed with the NCTL. Once a partnership agreement is drawn up, and places are advertised to applicants, that partnership must deliver the training. If you require further information regarding changing the ratifying ITT provider, contact the NCTL allocations team at [itt.allocations@education.gsi.gov.uk](mailto:itt.allocations@education.gsi.gov.uk).
- 1.28 Lead schools must not transfer trainees from one School Direct partnership to another without the prior agreement of NCTL or transfer a trainee from one School Direct route to the other (e.g. salaried to training programme or vice versa) . Lead schools should email [fa.team@education.gsi.gov.uk](mailto:fa.team@education.gsi.gov.uk) with details should such a transfer be proposed so that funding and trainee data implications can be considered, and no action should be taken before agreement is confirmed.

## Trainee eligibility

- 1.29 Any School Direct places allocated by NCTL may only be used for trainees who meet, and continue to meet, the eligibility criteria set out for each School Direct route. **All trainees must initially meet the criteria for entry to an ITT programme as set out in the [ITT criteria](#) before they can be considered for either programme.**
- 1.30 The following categories of trainees are not eligible to take up an allocated place on either School Direct programme:
- those who do not meet entry criteria as set out in the [ITT criteria](#) – providers and lead schools should be aware that includes passing the professional skills tests prior to entry; and
  - those who already hold QTS, or are eligible to receive QTS as an eligible [overseas trained teacher](#).

More information on QTS can be found on the [QTS webpages](#).

- 1.31 A trainee can still take up an allocated place on either SD route if they have previously failed an ITT route to QTS; however they, their ITT provider and/or their lead school will not receive NCTL funding, salary grant funding for School Direct (salaried) or a training bursary for School Direct (tuition fee).



## Already qualified teacher

- 1.32 Individuals who are members of the Institute for Learning (IfL) and hold Qualified Teacher in Learning and Skills (QTLS) are recognised as qualified teachers in schools; however they must continue to maintain their registration with the IfL. This will allow them to be appointed to permanent posts in state maintained schools in England. They are therefore not eligible to take up an allocated School Direct place.
- 1.33 Under current reciprocal arrangements, many qualified teachers from countries in the EEA or Switzerland are able to receive QTS if they apply directly to the NCTL. Individuals who are fully qualified teachers in Australia, Canada, New Zealand or the USA can also apply to the NCTL directly for QTS. Schools and ITT providers must ask applicants who have qualified as teachers in one of the countries mentioned above to apply to the NCTL directly for QTS. This can be done by emailing: [qts.enquiries@education.gsi.gov.uk](mailto:qts.enquiries@education.gsi.gov.uk) and must be done before a School Direct offer is made. Those who are subsequently awarded QTS may not take up a School Direct place. Those who are unsuccessful may be eligible to take up a place if they satisfy all other eligibility criteria.
- 1.34 In addition to the above eligibility criteria, there are further conditions that need to be met, which are specific to each training route. These are set out below.

## Additional criteria for School Direct (tuition fees) candidates

- 1.35 Trainees are only eligible to take up places on this route if they:
- meet the conditions for eligibility for student support, as set out in part 2, schedule 1 of the [Education \(Student Support\) Regulations](#);
  - are eligible to pay the 'home' tuition fee after assessment using the criteria set out in the Education Regulations above;
  - are undertaking a designated course leading to QTS for the purposes of attracting student support as outlined in schedule 2 of the Education (Student Support) Regulations, and not an employment based ITT programme or adult education programme; and
  - meet the eight eligibility criterion for receiving the training bursary as set out in the [training bursary guidance](#).

## Additional criteria for School Direct (salaried) candidates

- 1.36 Trainees are eligible to take up places on this route if they:

- are eligible to work in England as an unqualified teacher; and
- possess three or more years' work experience. However, the NCTL will allow schools to accept applications from high quality graduates with less than three years' work experience in hard to fill subjects, especially in maths, physics, chemistry, languages and computing. It will be for schools to decide whether they wish to accept applications from candidates with less than three years' work experience.

1.37 The lead school should take responsibility for ensuring that the candidate is eligible to take up employment as an unqualified teacher in England, before they are offered a place on the School Direct (salaried) route.

## Marketing for School Direct Places

1.38 From academic year 2015/16, Cabinet Office permits School Direct partnerships to spend up to 1% of their School Direct (salaried) grant funding for marketing purposes. School Direct (salaried) grant funding up to this limit can be used to publicise NCTL allocated academic year 2016/17 School Direct (salaried) places. If Schools are partnered with an HEI ITT provider, they can use their School Direct (fee) funding for marketing activities to support their ITT recruitment strategy. For a complete list of what marketing activity is covered, please refer to [the Cabinet Office controls guidance](#) on advertising, marketing and communication and consultancy.

1.39 As part of the grant funding agreement, school partnerships should provide evidence that any marketing expenditure has been undertaken in connection with their School Direct (salaried) programme. This funding should be used to deliver measureable outcomes relating to the grant funding agreement aims and objectives. The grant funding used for marketing purposes is intended to endorse School Direct (salaried) and School Direct (fee) programmes only.

1.40 As part of the grant assurance process, any marketing expenditure should be presented in the annual certification of expenditure statement form to your external auditor or accountant to certify. This certified form should be returned to your named contact in NCTL.

## Data requirements and reporting

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

### Data requirements from schools

- 1.42 Once a candidate has been recruited, lead schools are required to give accurate data to their partner ITT provider regarding in which schools the trainee is undertaking their training.
- 1.43 Lead schools that intend to claim the £6,000 School Direct (salaried) grant uplift will be required to complete an additional data return through the schools [data management system](#) to confirm the number of trainees who will receive an increased salary. Instructions on how to fill in this data return can be found on the 'School Direct (salaried) Programme grant funding uplift' page on the Schools DMS.

### Data requirements from ITT providers

- 1.44 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

- 1.45 Trainee data will be collected via the Higher Education Statistics Agency (HESA) Initial Teacher Training In-Year Record.
- 1.46 Once the data has been imported into the HEI Data Management System (DMS) for each School Direct trainee, ITT providers are required to indicate the lead school and up to five schools where trainees will be undertaking their training during their ITT course.
- 1.47 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

- 1.48 Non-HEI ITT providers need to submit trainee level data on the NCTL data management system; School Direct can be identified by selecting the appropriate route options on the trainee form. 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.

- 1.49 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 [SchoolsDMSsupport@texunatech.com](mailto:SchoolsDMSsupport@texunatech.com) to gain access to the NCTLDMS.

## 2. Receiving funding

- 2.1 NCTL funding can only be used for trainees on an allocated place, as set out in our [guidance for lead schools](#).
- 2.2 NCTL funds are to be used for the named trainee only. Funding cannot be shared across NCTL funded and non-funded places. Please see the Reconciliation and Audit Requirement section below.

### School Direct (tuition fee) funding

- 2.3 The School Direct (tuition fee) course is funded by the trainee, either directly, or with a SLC tuition fee loan. ITT providers will receive the tuition fee from SLC, or the trainee and the training bursary funding from NCTL (on behalf of the eligible trainee).
- 2.4 Only ITT places agreed by NCTL will attract financial support from Government in the form of bursaries and Student Loans and other Student Support.

### Tuition fees

- 2.5 Providers are advised to contact the [SLC](#) to determine the level of tuition fee loans that their trainees can access. Higher Education Funding Council for England (HEFCE) funded providers are also advised to contact the [Office for Fair Access \(OFFA\)](#), an independent public body that is responsible for promoting and safeguarding fair access to higher education, as part of this process to establish whether an OFFA agreement is required.
- 2.6 Trainees can apply for student finance from the SLC as soon as they have accepted an ITT place. They will need to be confirmed as eligible by the SLC in order to be able to access student finance including the tuition fee loans.
- 2.7 Once approved, the SLC will pay the tuition fee amount directly to the ITT provider on the trainee's behalf. **SLC will only pay the tuition fee loans to NCTL accredited ITT providers.**
- 2.8 ITT providers running courses will need to register their School Direct (tuition fee) trainees with the SLC at the start of the programme to receive tuition fee loans. They will need to register the trainee's attendance at the start of each term to receive the tuition fee loan. ITT providers who run part-time or modular courses only need to register their trainee once at the start of the programme to receive tuition fee loans.

- 2.9 Home or EU status trainees who choose not to access student finance (self-funders) will have to pay the ITT provider directly, and will need to agree timing of payment with the ITT provider prior to the start of the programme. Such trainees must be on an NCTL allocated place.
- 2.10 The School Direct partnership agreement should clearly set out the tuition fee to be charged for the course and how this will be allocated between the ITT provider and schools for their contribution to delivering the training.
- 2.11 For more information and guidance on student finance, please visit the [SLC Practitioners web pages](#), which offer guidance and support for institutions.

## **Training bursaries and scholarships**

- 2.12 Home or EU status trainees on School Direct (tuition fee) courses may be eligible to receive training bursaries. The training bursary awards are relevant to the academic year of study and can change from year to year.
- 2.13 Information regarding eligibility, training bursary rates, discretionary bursaries and scholarships is published in the [training bursary guidance](#) for AY2015/16.
- 2.14 Information regarding training bursary rates and scholarship funding for AY2015/16 is available on our [webpages](#).

## **Payments of School Direct (tuition fee) funding**

- 2.15 Training bursaries will be paid by NCTL to ITT providers to distribute to eligible trainees on School Direct (tuition fee). Please see the [training bursary guidance](#) for AY2015/16 for further information.

## **School Direct (salaried) funding**

- 2.16 Only lead schools are eligible to receive salaried funding. Lead schools must complete all highlighted sections in the School Direct (salaried) funding [grant offer letter](#) to sign up to the [terms and conditions](#) before any funding is released.
- 2.17 To take account of the changes to grant funding in AY 2015/16 for trainees in maths, physics and computing ALL lead schools, including primaries, are expected to complete a new GFA. NCTL will pay salary and training grant funding to lead schools in subjects set out on our [funding webpage](#). This funding is provided to cover training costs for trainees to achieve qualified teacher status (QTS) and subsidise the trainee's salary.
- 2.18 Trainees should not pay fees to cover the cost of the QTS award as they are not eligible for a training bursary or student loan. Schools and ITT providers should

ensure the candidate is aware of any expectation to pay for any additional academic qualifications, such as PGCE.

- 2.19 Lead schools may want to train candidates in subjects that do not attract funding, or where the candidate is ineligible for funding. For the School Direct (salaried) programme, lead schools are not restricted in the number of additional places to which they recruit, but they must be aware that there will not be any funding for these additional places and take into account the implications.

## **Training and salary grant rates**

- 2.20 The training and salary grant rates are based on locality and subject; the definitions of geographic areas can be found in [Annex B](#).
- 2.21 Training and salary grant rates paid to the lead school can be found on our [funding webpage](#).

## **Payments of School Direct (salaried) funding**

- 2.22 The first payment of School Direct (Salaried) grant funding is due to be made to lead schools at the beginning of September 2015 for the start of the new AY 2015/16. Details of the School Direct places currently allocated to lead schools by subject and route are available on the Allocation and Request Management System ([ARMS](#)). The amount payable for each trainee is dependent on the subject and geographical location of the school.
- 2.23 The training and salary grant will be paid on behalf of NCTL by the Education Funding Agency (EFA) to School Direct lead schools (or LAs for LA maintained schools) in 11 monthly installments from September to July. The payment will be received within the first five working days of each month. Lead schools will be able to use the [ITT funding extranet](#) during the academic year to view their current allocations, funded trainee numbers and a breakdown of the funding they will receive. The ITT funding extranet is accessible via a secure username and password. NCTL will write to lead schools to supply their login details once allocations and funding data has been uploaded to the extranet.
- 2.24 NCTL will write to lead schools in August 2015 when data from the UCAS recruitment system is clearer to confirm the amounts we will pay for the first three months of the academic year. We expect the payments will be sufficient to meet commitments; however if after receiving details of the September to November 2015 payments, a lead school is of the view that this is not the case and may cause the partnership undue financial hardship, they are invited to inform [fa.team@education.gsi.gov.uk](mailto:fa.team@education.gsi.gov.uk) of the actual recruitment levels against allocated places. NCTL will include further information about this process when confirming

the amounts to be paid from September to November. In any event, the accurate completion of ITT census data in October 2015 will enable actual funding requirements to be established and necessary adjustments made to subsequent months.

- 2.25 Following receipt of verified trainee data from the ITT provider in the October ITT census, NCTL will adjust funding to reflect actual recruitment where payable in year from the December payment onwards, issuing any arrears that may be due. Please note it is imperative that ITT providers have all the relevant information for trainees to complete the October ITT census. NCTL encourages lead schools to engage with ITT providers in this process to enable NCTL to get the correct funding to lead schools. As described above, NCTL intend to make payments for trainees eligible for the £5,000 additional grant funding using this same information in December 2015.
- 2.26 After the end of the academic year, NCTL will reconcile funded allocated places against final trainee data for the academic year and further adjustments to funding, including adjustments for withdrawals and trainees that complete their training early, the Troops to Teachers uplift for qualifying trainees, and the location of the trainee if they are employed at a school in a different funding area from the lead school, will be made where appropriate.
- 2.27 If a lead school is LA maintained, including voluntary aided, voluntary controlled, foundation or a Sixth Form College that currently receives its funding via the LA, the training and salary grant will be paid to the LA by the EFA. LA maintained lead schools and Sixth Form Colleges will need to work with their LA to ensure that arrangements are in place to ensure the school receives the funding promptly, so the payments can be made to ITT providers and partner schools in a School Direct Partnership, as required.
- 2.28 LA maintained schools/PRUs are required to pay trainees at least the minimum of the unqualified teachers' scale and the employing school is expected to fund any shortfall in salary and further costs.
- 2.29 Academies and Free Schools must pay trainees at an advertised rate and fund any shortfall in salary and further costs.
- 2.30 Regardless of the type of school, the partnership should build in the administration costs for their trainees within their partnership agreement. Funding arrangements and the recovery of unused funds should be covered in the Partnership Agreement. There is no extra funding available for administrative costs of running the School Direct (salaried) programme or delivering academic qualifications, e.g. PGCE Training or Master's credits.



## Duration

- 2.31 The NCTL will monitor the number of trainees who complete their programmes earlier than expected and may adjust funding/future allocations accordingly.

## Primary mathematics specialists/Primary general (with mathematics specialism)

- 2.32 NCTL offers a higher rate of funding for candidates who wish to train as a primary mathematics specialist or who are training for primary general (with mathematics specialism).
- 2.33 These higher funding rates only apply to trainees who have a B or above at mathematics A level or equivalent and are on primary mathematics specialist/specialism courses.
- 2.34 Trainees who do not have a B or above at mathematics A level or equivalent, will be funded as per primary (non-specialist) courses.
- 2.35 Further information about training bursary rates for School Direct (tuition fee) can be found on our [training bursary webpage](#). Information on the training and salary grant rates relating to School Direct (salaried) can be found on our [School Direct webpage](#).

## Troops to Teachers programme

- 2.36 To be eligible for the [Troops to Teachers](#) programme, a service leaver must be within the two years before or after leaving the Armed Forces. Their time in the Armed Forces counts towards the three years' work experience requirement. The extra funding will be paid once the trainee has been identified in the trainee registration on the DMS.
- 2.37 Eligible graduate service leavers on School Direct (tuition fee) will receive an additional £2,000 uplift to their training bursary, where existing training bursary eligibility has been established. Please note tuition fees are chargeable.
- 2.38 To apply, Service leavers will need to have served for 3 or more years. They will receive a salary and in addition, schools will receive a £2,000 uplift to the training and salary grant for eligible graduate service leavers on a school direct (salaried) NCTL allocated place. The £2,000 School Direct (Salaried) uplift will be paid to lead schools shortly after the end of the ITT Year.

## Maths and Physics Chairs

- 2.39 Post-doctoral researchers are recruited to the Maths and Physics Chairs programme. 'Chairs' in maths and physics will train as teachers with the aim of: enthusing, engaging and inspiring students to progress to A level study; lead subject knowledge development with teachers in local school partnerships; forge links with business; whilst continuing with their research.
- 2.40 In their first year Chairs train as teachers in their host school (through the School Direct Salaried ITT programme) and they continue their employment as qualified teachers in the second and third years. For 2015/16, ITT places are allocated for the Maths and Physics Chairs programme to lead schools via NCTL's programme delivery partner. They are treated as standard School Direct (salaried) places, with the same requirements for data reporting and the funding level depending on subject and location. There are a limited number of places in other priority subjects to support maths and physics cohorts. Additional costs associated with the programme, such as uplifted salary levels and programme support are funded outside ITT processes. The £5,000 uplift is not available for places allocated under the Maths and Physics Chairs programme.

## School Direct withdrawals and deferrals

### Withdrawals

- 2.41 For trainees who withdraw from School Direct (tuition fee) programmes, NCTL will pay training bursary payments to cover the last month of participation on the programme. Any monies issued by NCTL that cover beyond this date will be recovered in full from the ITT provider.
- 2.42 Trainees who withdraw from the School Direct (salaried) programme attract funding between the start date of their programme and the end of the month following the date of withdrawal; any surplus funding will be recovered by the NCTL after the end of the academic year. Providers are required to record all trainee withdrawals in the exit information tab on the DMS.

### Deferrals

- 2.43 Schools, in agreement with the ITT provider, are responsible for making the decision to allow a trainee to defer. Lead schools must communicate this decision to their ITT provider and NCTL.
- 2.44 For School Direct (tuition fee) trainees in receipt of a training bursary, they can only defer once they have commenced their ITT course and the school or provider must inform the NCTL Funding Team immediately. The NCTL will continue to pay

the training bursary; the school, or ITT provider must retain these funds until the trainee returns to the course. If the trainee does not return to the course, the NCTL will recover these unused funds in full.

- 2.45 On School Direct (salaried) they can only defer once they have commenced their ITT course. NCTL will only pay the ITT provider up to the maximum training and salary grant rate. ITT providers are required to record all trainee deferrals as dormant periods in the course details tab on the DMS. The school must retain these funds until the trainee returns to the course. If the trainee does not return to the course, the NCTL will recover these unused funds in full.

## Reconciliation

- 2.46 A reconciliation exercise will be carried out at the end of the academic year for both School Direct (salaried) and School Direct (tuition fee). NCTL will recover any surplus funds. Recovery will be by offsetting the lead schools' subsequent year's school direct funding if available or by invoice. NCTL funds are to be used for the named trainee only; any surplus funds as a result of withdrawals cannot be used for any other purpose, i.e. to fund additional trainees. The NCTL will recover all funding that is unused as a result of:

- under-recruitment against allocated places;
- trainee withdrawal;
- training location (School Direct Salaried only) or;
- NCTL may also recover funding for trainees completing the programme early (School Direct salaried only).

## Annex A – Organisation types involved in School Direct

	Definition/Role
<b>Lead school</b>	The lead school is the agreed point of contact for the partnership and holds the allocations from the NCTL for the partnership's School Direct training places. They will be responsible for communications across the partnership to and from the NCTL and between each partner school. The lead school is responsible for the partnership activity. The lead school must be a maintained (primary or secondary), a special school, Sixth form college, a Pupil Referral Unit, an Academy or Free School. Private schools cannot be lead schools unless they are designated as a Teaching School. In School Direct (salaried), the lead school is responsible for the training and salary grant funding and its distribution and for placing of trainees across the partnership. The lead school must agree with the ITT provider of the location of trainees.
<b>Partner School</b>	The partner school is any school within the partnership of schools involved in initial teacher training. State maintained partner schools may be the principle training school for any School Direct trainee. Partner schools which are private schools may provide modular training or act as a second placement school.
<b>ITT provider</b>	The ITT provider is formally recognised and accredited by the Department for Education in this role. The ITT provider is a full member of the School Direct partnership. As an accredited provider of ITT, it has the experience of delivering teacher training and is accountable for the marketing, selection, assessment and standards monitoring for the trainees. The ITT provider will formally recommend QTS for trainees for the partnership. Any training bursary funding from the NCTL is paid to the ITT provider who is responsible for paying it to the trainee.

## Annex B - Area definitions to calculate training and salary grant rates of funding

Please note that all **rates** are calculated in academic years, which runs from 1 August 2015 to 31 July 2016.

Initial payments of School Direct training and salary grant are based upon the location of the lead school, but actual payment will be calculated on the location of the employing schools and adjusted after the submission to the DMS of the trainee record by the ITT provider.

The geographical locations for variation are:

### Inner London boroughs

‘Inner London’ means the area comprising the London boroughs of Barking and Dagenham, Brent, Camden, City of London, Ealing, Greenwich, Hackney, Hammersmith and Fulham, Haringey, Islington, Kensington and Chelsea, Lambeth, Lewisham, Merton, Newham, Southwark, Tower Hamlets, Wandsworth and Westminster.

### Outer London boroughs

‘Outer London’ means Greater London, excluding the inner London area.

### London fringe area

Fringe area means:

(a) in Berkshire – the Districts of Bracknell Forest, Slough, and Windsor and

Maidenhead

(b) in Buckinghamshire – the Districts of South Buckinghamshire and Chiltern

(c) in Essex – the Districts of Basildon, Brentwood, Epping Forest, Harlow and Thurrock

(d) in Hertfordshire – the Districts of Broxbourne, Dacorum, East Hertfordshire, Hertsmere, St Albans, Three Rivers, Watford and Welwyn Hatfield

(e) in Kent – the Districts of Dartford and Sevenoaks

(f) in Surrey – the whole county, and

(g) in West Sussex – the District of Crawley.

## **Annex C – Funding rates provided to School Direct (salaried) places allocated after 5 February 2015 (Not including places allocated under the Maths and Physics Chairs Programme)**

Eligible subjects: maths, physics, computing, chemistry, modern and ancient languages, primary mathematics specialist and specialism, English, biology, design and technology, geography, music, religious education and primary (non-specialist).

**High priority subjects: physics, maths and computing.**

### **Funding per place (by region) Amount**

National	£30,000
Inner London	£34,900
Outer London	£33,600
London fringe	£31,200

The rates detailed in the table above include £6,000 grant-uplift to support the increased salary for mathematics, physics and computing trainees. It is a condition of receiving this higher rate that schools confirm with NCTL that they are offering a salary of at least £21,000 nationally, £22,000 in London fringe, £24,000 in outer London or £25,000 in inner London. If schools do not confirm the increased salary they will be paid the same rates as chemistry, modern and ancient languages and primary mathematics specialist and specialism.

**High priority subjects: chemistry, modern and ancient languages, primary mathematics specialist and primary general (with mathematics specialism)\***

### **Funding per place (by region) Amount**

National	£24,000
Inner London	£28,900
Outer London	£27,600
London fringe	£25,200

\*Funding for the primary mathematics specialist/specialism courses only applies to trainees with at least a B at maths A Level or equivalent.

**Other priority subjects: English, biology, design and technology, geography, music, religious education and Primary (non-specialist).**

### **Funding per place (by region) Amount**

National	£19,000
Inner London	£22,600

**Funding per place (by region) Amount**

Outer London £21,600

London fringe £19,900

## Annex D – Further information and contacts

Additional supporting information available via the websites below:

Purpose	Location
School Direct information for schools; getting involved and guidance for lead schools	<a href="https://www.gov.uk/government/collections/school-direct-information-for-schools">https://www.gov.uk/government/collections/school-direct-information-for-schools</a>
Get Into Teaching: Initial website for teachers to find out about teaching and routes into teaching	<a href="http://www.education.gov.uk/get-into-teaching">http://www.education.gov.uk/get-into-teaching</a>
School Direct Funding: pages which support and inform types of funding for Initial Teacher Training	<a href="https://www.gov.uk/funding-initial-teacher-training-itt-academic-year-2015-to-16">https://www.gov.uk/funding-initial-teacher-training-itt-academic-year-2015-to-16</a>
Degree Equivalency: information on compatibility of qualifications across the World with UK recognised degree standards	<a href="https://www.gov.uk/government/publications/overseas-degree-equivalency-table-and-methodology">https://www.gov.uk/government/publications/overseas-degree-equivalency-table-and-methodology</a>
UCAS teacher training: search and apply for training programmes beginning in 2015 through the UCAS Teacher Training scheme	<a href="https://www.ucas.com/ucas/teacher-training/apply-and-track">https://www.ucas.com/ucas/teacher-training/apply-and-track</a>
Initial Teacher Training criteria	<a href="https://www.gov.uk/government/collections/initial-teacher-training">https://www.gov.uk/government/collections/initial-teacher-training</a>
Initial Teacher Training criteria supporting advice	<a href="https://www.gov.uk/government/collections/initial-teacher-training">https://www.gov.uk/government/collections/initial-teacher-training</a>



Funding and payment queries should routinely be e-mailed to:

[FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk)

Questions surrounding allocations or available places should be e-mailed to:

[ITT.Allocations@education.gsi.gov.uk](mailto:ITT.Allocations@education.gsi.gov.uk)

Queries regarding the Grant Funding letters/agreements should be e-mailed to:

[GFA.nctl@education.gsi.gov.uk](mailto:GFA.nctl@education.gsi.gov.uk)

Queries regarding the October census, or any other data matter, should be e-mailed to the Data team at:

[TA.DataAssessment@education.gsi.gov.uk](mailto:TA.DataAssessment@education.gsi.gov.uk)

Queries regarding ITT funding Extranet access:

[TA.WEBFEEDBACK@education.gsi.gov.uk](mailto:TA.WEBFEEDBACK@education.gsi.gov.uk)

All other School Direct queries not answered on the website should be e-mailed to:

[school.direct@education.gsi.gov.uk](mailto:school.direct@education.gsi.gov.uk)

## Glossary

Term	Description
AY	Academic Year
ITT	Initial Teacher Training
QTS	Qualified Teacher Status
PGCE	Post Graduate Certificate in Education
DfE	Department for Education
NCTL	National College for Teaching and Leadership
FSM	Free School Meals
HEI	Higher Education Institution
HESA	Higher Education Statistics Agency
EU	European Union
HEIDMS	National College for Teaching and Leadership Data Management System to be accessed by HEI ITT providers
NCTLDMS	National College for Teaching and Leadership Data Management System to be accessed by Non-HEI ITT providers
Schools DMS	National College for Teaching and Leadership Data Management System to be accessed by schools
UCAS	Universities and Colleges Admissions Service (UK)

## Change log

Version	Published Date	Changes made
2.0	23/07/2015	School Direct (salaried) £5,000 funding for additional places.
2.0	23/07/2015	How to claim £6,000 School Direct (salaried) grant funding uplift in maths, physics and computing.
2.0	23/07/2015	Schools in Special Measures – arrangements.
2.0	23/07/2015	Trainee Transfers – Prior NCTL approval required.
2.0	23/07/2015	Trainee Eligibility – Trainees previously having failed an ITT course can take up an allocated place, however no funding will be available.
2.0	23/07/2015	Primary Maths Specialist/Primary general (with mathematics specialism) update.
2.0	23/07/2015	Maths and Physics Chairs – New section included.
2.0	23/07/2015	Funding arrangements for Deferred trainees updated.
2.0	23/07/2015	Marketing for School Direct Places added.



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