



National College for  
Teaching & Leadership

# **Initial teacher training bursaries funding manual**

**2016 to 2017 academic year**

**April 2017**

Version 1.3

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## Change log

Version	Published date	Changes made
V1.1	February 2016	<ul style="list-style-type: none"> <li>• <a href="#">Section 1: Specified this relates to ITT courses in England;</a></li> <li>• <a href="#">Section 2: Clarified that ITT providers should refer to figure 2 to determine qualification eligibility for Tier 4 bursaries. Also removed reference to primary-general in para 2.9;</a></li> <li>• <a href="#">Section 3: Amended wording of criteria C and F.</a></li> <li>• <a href="#">Section 6: Amended wording of para 6.1;</a></li> <li>• <a href="#">Section 8: Amended wording of 'Withdrawals/Deferrals' and 'Returning trainees' sections to clarify rules around bursary entitlement;</a></li> <li>• <a href="#">Section 10: Included link to online guidance for recruitment controls;</a></li> <li>• <a href="#">Annex B: Amended figure 2 so that Ordinary degree shows no equivalence; and</a></li> <li>• <a href="#">Annex E: Corrected figure 4 and figure 6 for £20,000 bursary.</a></li> </ul>
V1.2	June 2016	<ul style="list-style-type: none"> <li>• Change log moved to beginning of document.</li> <li>• <a href="#">Annex F added to illustrate key dates in funding cycle.</a></li> <li>• <a href="#">Annex G added to illustrate key dates in AGR process</a></li> <li>• <a href="#">Section 3: Included link to Education (Student Support) Regulations 2011</a></li> <li>• <a href="#">Section 3: included link to Student Loans Company</a></li> <li>• <a href="#">Section 3: Further information on assessing Home or EU status.</a></li> </ul>
V1.3	March 2017	<ul style="list-style-type: none"> <li>• <a href="#">Annex E: Amended wording of bullet points on page 36 to clarify that all criteria must be met to receive regular and uplift payments.</a></li> <li>• Updated email address from <a href="mailto:fa.team@education.gov.uk">fa.team@education.gov.uk</a> to <a href="mailto:ITT.Funding@education.gov.uk">ITT.Funding@education.gov.uk</a></li> </ul>

## Introduction

1.1 This guide is for School Direct lead schools and initial teacher training (ITT) providers<sup>1</sup> delivering either scholarship, School Direct (tuition fee) or provider-led programmes in England. It provides information about eligibility for, and rates of, training bursaries available to trainees starting ITT courses in the 2016 to 2017 academic year. Information for applicants and trainees is available on the [Get into Teaching website](#).

1.2 We will inform lead schools and ITT providers if the guidance changes. Any changes will be identified in a change log in revised publications.

## Overview

1.3 The training bursary is a financial incentive to attract and retain high quality graduates in the teaching profession. Training bursary levels vary according to the trainee's degree classification and the subject in which they wish to train to teach.

1.4 The training bursary awards and levels are outlined in [Section 2](#), with [Figure 1](#) providing an overview of the financial incentives and eligibility criteria for trainees.

1.5 Training bursaries are mostly awarded to trainees based on the classification of their first degree but are also available to trainees who hold other relevant academic qualifications such as master's, doctoral, medical and overseas degrees. Further information about training bursaries is provided in [Annex B](#) and [Annex C](#).

1.6 We work with subject associations to provide a limited number of scholarships worth up to £30,000 for trainees on physics and £25,000 in secondary mathematics, chemistry and computing ITT courses. More information about these scholarships is available on the [Get into Teaching](#) website.

1.7 Separately, we provide training bursaries for subject knowledge enhancement (SKE) courses in certain subjects to help potential trainees gain the depth of knowledge needed to train to teach their chosen subject. These courses are outside the scope of this document. More information about SKE funding can be found on [our website](#).

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<sup>1</sup> School-centred initial teacher training providers (SCITTs) and higher education institutions (HEIs).

# 1. Training bursary award and eligibility

## Eligibility

2.1 The training bursaries are intended to provide a financial incentive for high quality graduates to enter and also complete ITT. Training bursaries are available for individuals training to teach in a range of subjects. Training bursary rates vary by course subject and degree classification of the trainee. [Figure 1](#) sets out the training bursary rates for the 2016 to 2017 academic year.

2.2 The training bursary award is fixed for the duration of the trainee's ITT programme and is not affected by the length or mode of training being undertaken.

2.3 The training bursary level awarded is dependent on the subject in which a trainee wishes to teach and the grade of their highest academic qualification – not the subject of their academic qualification. For instance, a trainee with a first class degree in geography will be eligible for a £30,000 training bursary if they are training to teach physics, and £15,000 if training to teach geography. This does not change the process of selection or recruitment that the ITT provider would go through, including making judgements about the relevance of the degree to the subject of training.

2.4 The payment processes for the training bursaries are described in [Section 8](#).

2.5 This document only concerns training bursaries available for trainees starting courses in the 2016 to 2017 academic year only. We will publish further information about any training bursaries available in future years in due course. Lead schools and ITT providers should not make assumptions about the value or scope of training bursary awards in future years based on the information provided in this document.



## Eligible ITT subjects

Eligibility <sup>1</sup>	ITT subject or phase									
	Physics	Secondary mathematics	Chemistry, computing	Languages <sup>4</sup>	Biology	Primary mathematics <sup>5</sup>	Geography	Design and technology	English, history, RE or music	Primary
Scholarship <sup>2</sup>	£30,000	£25,000	£25,000	-	-	-	-	-	-	-
Trainee with first class or doctoral degree	£30,000	£25,000	£25,000	£25,000	£20,000	£6,000	£15,000	£12,000	£9,000	£3,000
2:1 or master's degree	£25,000	£25,000	£20,000	£25,000	£15,000	£6,000	£15,000	£9,000	£4,000	£3,000
2:2	£25,000	£25,000	£20,000	£20,000	£15,000	£6,000	£15,000	£0	£0	£0
Other degree award	£9,000 <sup>3</sup>	£9,000 <sup>3</sup>	£0	£0	£0	£3,000	£0	£0	£0	£0

**Figure 1: Financial incentives for those who train in the 2016 to 2017 academic year**

<sup>1</sup> Applicants with a degree from outside the UK should refer to the [equivalency table \(pdf, 1MB\)](#) to identify if their degree is likely to attract a bursary, and/or should consult their chosen training provider.

<sup>2</sup> Trainees in mathematics, physics, chemistry and computing with a 2:2 or above are able to apply for a teacher training scholarship with the appropriate professional body.

<sup>3</sup> Trainee teachers in secondary mathematics and physics with a relevant degree classification below the 2:2 requirement and at least a B at A level in mathematics or physics (or equivalent) will be eligible for a bursary of £9,000. Qualification eligibility can be determined from [Figure 2](#). Trainees will not be entitled to this bursary if they are also entitled to a scholarship or higher bursary based on degree class. See para 2.12 for further detail.

<sup>4</sup> Bursaries are available to train to teach modern foreign languages, community languages and ancient languages including Latin and Ancient Greek.

<sup>5</sup> Trainee teachers in primary mathematics courses, with at least a B at A level in mathematics (or equivalent) will be eligible for a bursary of £6,000 or £3,000 dependant on degree classification. Qualification eligibility can be determined from [Figure 2](#). Trainees on general primary courses will be eligible for the standard primary bursary.

A full list of designated ITT subjects and NCTL funding can be found in [Annex A](#).

2.6 A scholarship award of £30,000 for trainees with a 2:2 or above is available in physics and £25,000 in secondary mathematics, chemistry and computing. A scholarship award replaces a trainee's bursary eligibility.

2.7 Physics, secondary mathematics, chemistry, computing, languages, biology, geography and primary mathematics specialists and specialisms will attract a bursary if the trainee has a 2:2 degree or above. The bursary levels will vary depending on the trainee's degree classification and subject, as shown in [Figure 1](#).

2.8 Trainee teachers in physics and secondary mathematics may be eligible for a bursary of £9,000 without the minimum 2:2 classification. To qualify for this training bursary, the trainee must have an eligible degree in a relevant subject with at least a B at A level (or equivalent) in mathematics, further mathematics or physics. A list of degree subjects considered relevant for this purpose is provided at [Annex D](#). (It is the responsibility of the ITT provider to determine and decide equivalency). Trainees will not be entitled to this training bursary if they are also entitled to a higher bursary on the basis of their degree classification.

2.9 Design and technology, English, history, music, RE and primary will only attract a training bursary if the trainee has a 2:1 degree classification or higher. There are no training bursaries for trainees with 2:2 degrees in these subjects.

## **Primary mathematics specialist (and specialism)**

2.10 The primary mathematics bursary is available to trainees on primary mathematics specialist or specialism courses only. In order to be eligible for the primary maths bursary, trainees must have at least grade B mathematics A level or equivalent subject knowledge. Equivalency in this context may include higher education qualifications.

2.11 The eligibility requirements for the primary mathematics specialist course are the same as those for the primary mathematics bursary. Therefore all trainees on the primary mathematics specialist will receive the primary mathematics bursary, at a level determined by their degree class.

2.12 The eligibility requirements for the primary mathematics specialism course differ from those for the requirements for the primary mathematics specialist course. Trainees may be recruited to the primary mathematics specialism course without having at least a B at A level (or equivalent) in mathematics. Such trainees are not eligible for the primary mathematics bursary; however they may be eligible for the primary bursary, subject to the class of their degree. Trainees on the primary mathematics specialism course who do have at least a B at A level (or equivalent) in mathematics are eligible for the primary mathematics bursary, at a level determined by their degree class.

2.13 It is the responsibility of the recruiting organisation, be that the lead school or ITT provider, to determine and decide equivalency. NCTL will not determine equivalency for

individual cases, Those who train on general primary courses, will receive the normal primary bursary for their degree class.

## **Undergraduate bursary**

2.14 A training bursary for final year undergraduates of £9,000 is available for trainees on courses in secondary mathematics and physics that lead to QTS. The bursary is available to undergraduate trainees who enrol on a QTS course beginning in the 2016 to 2017 academic year, and is payable in the final year of their course.

2.15 The same £9,000 training bursary is available to trainees on an opt-in secondary undergraduate mathematics and physics course that leads to QTS. This bursary is payable in the year in which the QTS element of the course takes place.

2.16 For both of these courses, trainees who are on a four-year undergraduate course that leads to the award of QTS and that also leads to the award of a Master's degree receive a £9,000 bursary in both the third and fourth years of their course.

## **Non-eligible ITT subjects**

2.17 A full breakdown of eligible subjects can be found in [Annex A](#). No other ITT courses will attract a training bursary, regardless of a trainee's degree class. Details of which academic qualifications are linked to the relevant training bursary levels are given in [Annex B](#).

### 3 Eligibility for training bursaries

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

- a) be an “eligible” student for the provision of UK student support;  
be training in an eligible ITT subject listed, as identified in [Annex A](#);
- b) hold a UK first degree or equivalent;
- c) be taking a qualifying postgraduate ITT course in England;
- d) be notified by their ITT provider in writing that they are eligible;
- e) comply with the terms and conditions of the bursary scheme;
- f) possession of, or eligibility for, QTS;
- g) not be undertaking paid teaching work when receiving the bursary; and
- h) not be simultaneously undertaking any other ITT course, training scheme or programme leading to QTS.

#### (a) Eligibility for UK student support.

3.2 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 [Education \(Student Support\) Regulations 2011](#), part two (eligibility), no. 1986. This includes that they meet the requirement to be ‘Home or EU status’ for the purpose of assessment of fees, for further information on this requirement you should contact [Student Loans Company](#)

3.3 Trainees from the Isle of Man, Jersey and Guernsey may not meet one of the definitions above. However they may still be eligible for support from their respective home education departments and, where this is the case, they will still be eligible for a training bursary on the basis that they meet all other criteria.

3.4 International students can contact the [UK Council for International Student Affairs \(UKCISA\)](#) for advice on student support and other issues around studying in the UK.

#### (b) UK first degree

3.5 ITT providers should use the trainee’s highest academic qualification which aligns with the appropriate training bursary tier, to determine eligibility for a training bursary. For most courses, ITT providers should be confident that a trainee’s academic qualification

has the same level of breadth and depth that would be expected of a UK first degree or equivalent with at least second class honours.

3.6 Trainees on primary mathematics, secondary mathematics or physics courses who hold a lower than second class degree and a B or above in A level in mathematics or physics (or equivalent) are eligible for a bursary award. These are the only circumstances in which training bursaries will be paid for trainees who hold a lower than second class degree. ([Figure 1](#) identifies the value of training bursary available for each degree classification).

### **(c) Qualifying postgraduate ITT course in England**

3.7 To be eligible to receive a bursary, the trainee must be recruited to a qualifying place on a postgraduate ITT course in England. A qualifying place must:

- enable a trainee to be recommended for the award of QTS upon successful completion;
- be delivered by an institution accredited by NCTL as an ITT provider; and
- be offered to trainees before NCTL stops recruitment in a specific subject. The published guidance for the recruitment controls, including the control thresholds, can be viewed online on [GOV.UK](#). Lead schools and ITT providers will only attract funding in the subjects identified in [Annex A](#).

### **(d) Determination and notification of eligibility**

3.8 The ITT provider must determine whether a trainee is eligible to receive a bursary and inform them in writing if this is the case. ITT providers should ensure that trainees are informed of whether they are eligible for the bursary in good time before the start of their ITT course.

3.9 ITT providers are responsible for determining an individual's eligibility for a bursary. An individual is only eligible for a bursary when this is confirmed by their ITT provider.

### **(e) Terms and conditions of the bursary**

3.10 To receive a bursary trainees must agree in writing to comply with the terms and conditions of the bursary scheme, these include;

- promptly informing their ITT provider of any changes in their bank account and address details,
- promptly informing their ITT provider of their intention to withdraw from the course; and

- signing a declaration of understanding to the effect that expect to seek a teaching post in England on successful completion of their course.

3.11 ITT providers must make clear in their terms and conditions the implications of not completing the course.

3.12 The terms and conditions must make clear how the ITT provider intends to pay the trainee. Please see [Section 8](#) for more details on payment patterns.

3.13 If a trainee is found to be ineligible for the bursary, the ITT provider must make all reasonable efforts to recover bursary payments from the trainee.

## **(f) Possession of, or eligibility for, QTS**

3.14 Individuals who hold QTS on the first day of their ITT course are not eligible for a training bursary.

3.15 Under current reciprocal arrangements, most qualified teachers from countries in the European Economic Area (EEA) or Switzerland are able to receive QTS following application to NCTL. Teachers who qualified in Australia, Canada, New Zealand and the USA can also apply to NCTL to be awarded QTS. Lead schools and ITT providers should advise applicants in both of these categories to apply to NCTL. Teachers who are successful in their application and receive QTS will not be eligible for an ITT place, or a bursary; those that are unsuccessful in their application to NCTL may be considered eligible.

3.16 Potential trainees who may already be eligible to receive QTS under the conditions described above should email [qts.enquiries@education.gsi.gov.uk](mailto:qts.enquiries@education.gsi.gov.uk) or visit [Qualified teacher status \(QTS\): qualify to teach in England](#) for more information.

3.17 Individuals who hold Qualified Teacher Learning and Skills (QTLS) status and are members of the Education and Training Foundation (ETF), formerly the Institute for Learning (IfL), are recognised as qualified teachers in maintained schools in England. They must continue to maintain their registration with the ETF for this recognition to be valid. They will still be able to apply for an ITT place and in turn receive a bursary. However, they must meet all the criteria specified in [Section 3](#) to be eligible.

## **(g) Paid teaching work**

3.18 The training bursary is designed to support the trainee whilst undertaking their ITT training and, in particular, their teaching practice. Trainees who undertake paid teaching in a school or institution become ineligible to receive the training bursary from the date they start this work.

3.19 Trainees are deemed to be employed as a teacher if they are employed under a contract of employment or services with one or more local authority, governing body or institution to:

- be the headteacher or principal of one of more schools or institutions; or
- carry out one or more of a range of specified activities at one of more schools or institutions.

3.20 This definition of a teacher can include people employed by a local authority to teach as a supply teacher in schools maintained by that authority, but does not include people employed by private teacher supply agencies or private tutors.

3.21 The definition of a teacher includes “unqualified” teachers who meet one or more of the descriptions set out in paragraphs 2 and 4—9 of schedule 2 in the [Education \(Specified Work and Registration\) \(England\) Regulations 2003 \(no 1663\)](#). Under this definition, teachers are permitted to carry out specified activity, including delivering lessons and assessing the development, progress and attainment of pupils. Please review these regulations for the full definition of specified activity.

3.22 The specified activities described above may count as teaching practice that leads to the assessment of QTS. ITT providers must inform their trainees that if they are employed to carry out one or more of the activities described above they will no longer be eligible to receive a bursary.

## **(h) Undertaking other ITT course, training scheme or programme leading to QTS.**

3.23 To be eligible for training bursary, trainees must not simultaneously undertake any other ITT course, training scheme or programme leading to QTS.



## 4 Admissions

4.1 ITT providers will need to ensure those responsible for decisions on bursary eligibility 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.

4.2 All ITT providers should be aware of the range of degrees awarded by UK institutions. In all cases, the ITT provider is responsible for deciding whether an individual's highest relevant academic qualification meets the bursary eligibility criteria. This includes decisions about whether a particular qualification demonstrates the breadth and type of academic engagement that would be expected from a bachelor's, master's or doctoral degree.

4.3 Where ITT providers lack the institutional experience to assess the validity of academic qualifications they should refer to the [Framework for Higher Education in England, Wales and Northern Ireland](#).

4.4 Further guidance about how to assess the equivalency of UK qualifications is provided at [Annex B](#).

## 5 Trainees who teach outside of England

5.1 ITT providers should seek assurances from trainees in receipt of a bursary to the effect that they understand that they will be expected to seek a teaching post in England upon successful completion of their course.

5.2 NCTL will collect data on trainees who are not domiciled in England and are accessing bursaries. NCTL reserves the right to request further information from ITT providers with high levels of trainees who are domiciled outside of England.

5.3 Further information about assessing the equivalency of overseas qualifications is provided at [Annex C](#).

## 6 School Direct (tuition fee) bursaries

6.1 Trainees on School Direct (tuition fee) courses may be eligible for a bursary depending on their degree class and the subject in which they wish to train to teach. A full list of eligible ITT subjects can be found in [Annex A](#).

6.2 ITT providers are responsible for the management and administration of bursary payments, including assessment of eligibility and awarding the bursary to the trainee. This also includes drawing up terms and conditions relating to receipt of the bursary. Where a ITT provider pays the Student Loans Company (SLC) to administer the bursary, the ITT provider remains responsible and accountable for the management of this funding.

6.3 ITT providers must work with their lead school to submit relevant data to NCTL; this includes the data required to complete the ITT Census return in October 2016. Any queries relating to the completion and submission of this data should be directed to [HeiDmsSupport@texunatech.com](mailto:HeiDmsSupport@texunatech.com) in the case of HEIs and [dmssupport@texunatech.com](mailto:dmssupport@texunatech.com) for non-HEIs.

## 7 Scholarships programme

7.1 NCTL is working with a number of professional bodies to award scholarships for trainees on courses in specific subjects. These scholarships are available to eligible trainees with a 2:1 or first degree. There is a £30,000 scholarship available for trainees on physics courses and £25,000 for trainees on secondary mathematics, chemistry or computing courses.

7.2 A scholarship award replaces a trainee's bursary eligibility. Trainees who apply for but do not gain a scholarship may be eligible for a training bursary award.

7.3 NCTL is responsible for administering scholarship payments to ITT providers. These payments will be made via the standard training bursary funding process. These will be administered in the same way as the top tier bursary award for the relevant subjects and the award will be weighted. Please see [Section 8](#) for more information on how the award will be paid to trainees.

7.4 The relevant professional body will assess applicants for eligibility for the scholarship and inform the individual if they have been recommended for the scholarship. Trainees who do not hold a degree at 2:1 or above can still be considered for a scholarship if they can satisfactorily demonstrate strongly evidence relevant degree-level subject knowledge.

7.5 The applicant must secure an eligible physics, chemistry, secondary mathematics or computing ITT place by 1 September 2016 for the scholarship award to be valid. An applicant will lose their scholarship entitlement if they are unable to secure a place on an eligible course by this date.

7.6 It is not necessary for applicants to secure a physics, secondary mathematics, chemistry, or computing place before applying for a scholarship; they may apply for the scholarship at any time before applying for, or commencing, an ITT place.

7.7 Trainees are responsible for informing their ITT provider that they have been recommended for a scholarship.

7.8 ITT providers must ensure that each trainee in receipt of a scholarship is identified appropriately within the ITT Census.

7.9 The ITT provider or lead school remains responsible for selecting trainees for courses regardless of their recommendation for a scholarship. Recommendation for a scholarship does not override, or take priority over, the eligibility criteria as set out in [Section 3](#).

7.10 Trainees are advised to visit the [Get into Teaching](#) website for more information about scholarship awards.

## 8 Bursary and scholarship payments

8.1 ITT providers should make bursary payments to trainees in equal monthly instalments throughout the academic year. However, trainees in receipt of the larger awards should receive two additional payments over the duration of their training as detailed in [Figure 4](#).

8.2 Bursary payments are not taxable. However, as with student maintenance loans, they may be treated as capital income for the purposes of assessing income for trainees in receipt of state benefits. We advise ITT providers to direct trainees towards their local benefits office to check whether this may affect their eligibility for state benefits.

8.3 It is the responsibility of the ITT provider to transfer bursary payments to trainees. Specific conditions apply to the timing and value of these payments, depending on the value of the award and type of study. These conditions are set out in detail in [Annex E](#).

### Withdrawals/Deferrals

8.4 Eligible trainees who withdraw or defer from a course are entitled to be paid the training bursary for each month up to, and including, the month in which they withdrew. These trainees are only entitled to receive a bursary payment for the month they withdraw if they were still on the course at the time the ITT provider made the payment.

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

### Returning trainees

8.6 Returning trainees who defer and then rejoin their course will only be eligible to receive the remaining bursary award up to the value which was available in the year they started their course. In extenuating circumstances, where the length of the course is increased and the trainee needs to complete a longer period of training than expected, ITT providers should email [ITT.funding@education.gov.uk](mailto:ITT.funding@education.gov.uk).

8.7 If a trainee leaves one ITT course and joins a new one with no transfer of standing or credit from their previous course, and they are being charged a new tuition fee, this is viewed as a separate route to QTS. They will, therefore, be entitled to receive a new bursary. However, trainees who have already received a full bursary award on a previous route to QTS will not be eligible for another bursary.

8.8 If a trainee leaves one ITT course and takes any advanced standing or credit to a new ITT course, the trainee will only be eligible for the remainder of any training bursary they were receiving on the original course.

## 9 Monitoring, assurance and data requirements

### Monitoring and Assurance

9.1 ITT providers must hold full records of all trainees in receipt of bursaries, including details of trainees' academic qualifications achieved prior to starting their ITT. Trainees must be in receipt of the degree on which their assessment was based, prior to starting the course. NCTL reserves the right to request these details at any point during the academic year from ITT providers, for the purpose of monitoring quality.

9.2 NCTL will use the annual and interim census data collections and the annual audit grant reporting process to seek rigorous assurance about the bursaries allocated by an ITT provider. The ITT provider's responsible officer will be required to verify these data sets.

9.3 NCTL will review allocated training bursary funding that ITT providers receive and reconcile this amount with the trainee records submitted at each census point. Funding will be adjusted at these points to meet the actual amount required. Where funding received has exceeded the total amount required for actual trainees, NCTL will seek to recover the excess by means of invoice or by offsetting against future payments.

9.4 ITT providers are reminded of the need to ensure that all trainee records on the NCTL's ITT data management system are complete. NCTL reserves the right to delay or withhold payments if data is inaccurate or incomplete.

9.5 NCTL will carry out a reconciliation exercise between the bursaries allocated, and the actual trainee records as confirmed by the HESA and SCITT data collection exercises. In the event of any variances, particularly with regard to unclassified degrees, NCTL reserves the right to ask ITT providers to request explanations of the variances and to seek further information. ITT providers that pay bursaries to trainees who are found to be ineligible will not be reimbursed for any expenditure. Additionally, ITT providers are required to submit the independently audited Audit Grant Report after the academic year has concluded to allow reconciliation of funding where trainees have deferred or withdrawn from programmes. We will request an interim return prior to this to provide an indicative reconciliation amount before the academic year end.

### Data requirements and reporting

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

9.7 Failure to comply with requests for data may result in non-compliance by the ITT provider, which may lead to eventual withdrawal of accreditation.

## Data requirements for schools

9.8 Lead schools are required to give accurate data to their partner ITT provider about the schools in which each trainee is undertaking training. This must include the dates of the training periods so that this can be uploaded onto the Data Management System.

## HEI providers

9.9 Trainee data will be collected via the Higher Education Statistics Agency (HESA) ITT In Year Record. ITT providers are required to submit trainee-level data. Trainees will have teacher training course codes which will be confirmed in due course.

9.10 Once all data has been imported into the HEI Data Management System, School Direct ITT providers are required to identify the lead school and up to five placement schools for each trainee.

9.11 Details of the process are available in the HEI DMS guidance document which is available to users of the HEI DMS. Further information on this is sent out before the start of each new academic year. HEI providers can contact the helpdesk at [HeiDmsSupport@texunatech.com](mailto:HeiDmsSupport@texunatech.com) to access to the HEI DMS.

## Non-HEI providers

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

9.13 Full details of the process are available in the NCTL DMS guidance document which is available to users of the NCTL Data Management System. Further information on this is sent out before the start of each new academic year. New users can contact the helpdesk at [dmssupport@texunatech.com](mailto:dmssupport@texunatech.com) to access the NCTL DMS.



## 10 ITT recruitment controls and funding

10.1 Previously the number of ITT trainees has been managed by allocating places to School Direct lead schools and ITT providers on a course-by-course basis using bids received from those schools and ITT providers. For the 2016 to 2017 academic year we will continue to use a national estimate of the number of trainees required to meet the needs of the school system but we will manage recruitment at a national level. This means that eligible schools and ITT providers will be able to recruit (subject to a limited number of controls) as many trainees as they feel they need – until the system has recruited sufficient trainees.

10.2 It is a NCTL requirement that all lead schools and ITT providers join the UCAS teacher training scheme (UTT) and use this system to record recruitment activity. We will use a combination of the number of offers accepted (“acceptances”) and the number awaiting applicant response (“offers”) as recorded on UTT to measure recruitment against our control thresholds. Once a threshold is met, all existing offers (both conditional and unconditional) will remain in place but no further recruitment activity will be permitted. In practice, this means that the School Direct lead school or ITT provider must not record any more offers on UTT for the affected course. The published guidance for the recruitment controls, including the control thresholds, can be viewed online on [GOV.UK](http://GOV.UK). Any queries relating to this should be directed to [ITT.Allocations@education.gsi.gov.uk](mailto:ITT.Allocations@education.gsi.gov.uk).

10.3 The training bursary cost (where applicable) and liability for any additional trainees recruited after NCTL has instructed to stop recruiting in a given subject will be borne by the School Direct lead school or ITT provider; NCTL funding will not be provided for any additional offers made after enforcement of the recruitment control has been communicated. Any over recruitment of this nature may result in additional recruitment controls, reduced allocations for future intakes or, in extreme cases, withdrawal of accreditation.

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

- Primary
- Primary mathematics
- Biology
- Chemistry
- Classics<sup>2</sup>
- Computing
- Design and technology<sup>1</sup>
- English
- Geography
- History
- Secondary Mathematics
- Languages<sup>2</sup>
- Music
- Physics
- RE

<sup>1</sup> Engineering and manufacturing receive a bursary under design and technology heading.

<sup>2</sup> Modern languages are included within 'languages' in the bursary subjects. Languages include any modern language and classics with a language bias such as Latin or Greek.

This list is exhaustive; NCTL will not provide bursaries for any subject that does not feature in this list.

## Annex B: 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

“developed an understanding of a complex body of knowledge, some of it at the current boundaries of an academic discipline”.

In addition, holders of this award “will be able to evaluate evidence, arguments and assumptions, to reach sound judgements and to communicate them effectively.”

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 license to train in a particular subject, such as accounting. A trainee may sometimes be transferred from an honours programme onto an ordinary degree programme if they have not achieved the required grades throughout the programme to graduate with honours.

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 provider 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 Bachelor's of Medical Science (B Med Sci). ITT provider 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 <sup>1</sup>	✓				
Medical master's degree (distinction)	✓				
Master's degree <sup>2</sup>		✓			
Third class honours degree				✓	
Ordinary degree					✓
Aegrotat					✓
No first degree					✓

**Figure 2: Equivalent qualifications for bursary award eligibility**

<sup>1</sup> Honorary doctoral degrees are not recognised.

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

10. ITT providers cannot consider these aegrotats, non-honours or ordinary degrees as suitable equivalency for a bursary award. Aegrotats are degrees awarded if a trainee was unable to sit their final exams due to illness and are not eligible for the bursary in their own right.

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 ITT 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](mailto:ITT.funding@education.gov.uk) for more 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, programme 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) which are granted, on application, by Oxford, and the University of Cambridge, to graduates of these universities with a Bachelor of Arts (BA). 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 enable students to reach master's level. Providing they have reached a suitable

standard of achievement after three years of bachelor's-level study, students can study for a fourth year for a master's degree where the academic level of work in the fourth year is at master's rather than at bachelor 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 didn't have a degree classification or pass/merit distinction, can be considered for the higher bursary, but the ITT provider will be required to demonstrate that the trainee is of high quality. Trainees that did not complete the final year can be awarded a bursary based on their final degree classification on exit and the subject in which they train to teach.

## Doctoral degrees

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 lead usually to awards which include the name of the discipline in their title (Ed.D, DClinPsy or DBA are common examples). The titles PhD and DPhil are commonly used for doctoral degrees awarded on the basis of original research. The level of study associated with a doctoral degree should typically equate to 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 C: 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, 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 first 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 ITT 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](mailto: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](mailto: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 ITT provider is able to provide a strong business case backed up by a full audit trail for bursary eligibility.

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

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

### Mathematics

G100 - Mathematics

G200 - Operational Research

G300 - Statistics

G900 - Others in Mathematical and Computing Sciences

### Physics

**F200 - Materials Science**

**F300 - Physics**

**F500 - Astronomy**

H100 - General Engineering

H200 - Civil Engineering

H300 - Mechanical Engineering

H400 - Aerospace Engineering

H500 - Naval Architecture

H600 - Electronic and Electrical Engineering

H700 - Production and Manufacturing Engineering

H900 - Others in Engineering

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

## Annex E: Value and timing of training bursary payments

1. Payments to trainees on full-time courses should normally be made each month between the October and July of the academic year concerned.

### Payments for full-time courses

#### Bursary awards of £12,000 or less

2. Bursary awards of £12,000 or less should be paid in **equal** monthly instalments over the duration of the course, as shown in [Figure 3](#).

Bursary award	Value of monthly instalments (October 2016 to July 2017)
£3,000	£300
£4,000	£400
£6,000	£600
£9,000	£900
£12,000	£1,200

Figure 3: Bursary payment schedule for awards of £12,000 or less to full-time trainees

## Bursary awards of £15,000 or more

3. Bursary awards of £15,000 or more for full-time courses should be paid so that a trainee receives equal monthly instalments throughout the year with additional payments at made two points within the year. This schedule is shown in [Figure 4](#).

4. The first additional payments should be paid in the February of the trainee's ITT course. The second should be paid in either July (or the final month in which the trainee successfully completes their ITT course). To receive the additional payments, the trainee must:

- be present on the course on the date of each payment; and
- in the case of the first payment, be present on the course on 1 January 2017<sup>2</sup>; and,
- in the case of the second payment, complete their ITT course.

Bursary award	Value of monthly instalments
£15,000	£1,200 from October to July; and An additional £1,500 in February and July (£2,700 in total for each of these months)
£20,000	£1,500 from October to July; and An additional £2,500 in February and July (£4,000 in total for each of these months)
£25,000	£2,000 from October to July; and An additional £2,500 in February and July (£4,500 in total for each of these months)
£30,000	£2,500 from October to July; and An additional £2,500 in February and July (£5,000 in total for each of these months)

**Figure 4: Payment schedule for bursary awards of £15,000 or more to trainees studying full-time**

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<sup>2</sup> This date aligns with Student Loans Company eligibility for second term loan payments.

## Payments for part-time or modular courses

5. Trainees on part-time or modular courses may receive a higher proportion of their total bursary award in any one instalment. However ITT provider must ensure that no more than 50 per cent of the award is transferred in any one instalment.
6. ITT providers can pay the bursary award at the start and end of the course and the other half upon recommendation for QTS. Any such payment schedule should be weighted to avoid cashflow problems for the trainee.
7. As part-time courses will span more than one academic year, ITT providers may award the bursary beyond the October 2016 to July 2017 period. ITT providers are reminded that any bursary payments made after 31 July of the academic year will be included as expenditure for the following academic year.

### Bursary awards of £12,000 or less

8. [Figure 5](#) sets out the possible payment patterns for bursary awards of £12,000 or less to trainees on a part-time or modular courses.

Bursary award	Payment schedule
£3,000	Two payments of £1,500 at the start and end of the course; or  Three payments of £1,000 during the course; or  A flexible payment plan for modular courses ensuring that no more than £1,500 is paid in one instalment
£4,000	Two payments of £2,000 at the start and end of the course; or  Two payments of £1,333 and one of £1,334 during the course; or  A flexible payment plan for modular course ensuring that no more than £2,000 is paid in one instalment
£6,000	Two payments of £3,000 at the start and end of the course; or  Three payments of £2,000 during the course; or  A flexible payment plan for modular courses ensuring that no more than £3,000 is paid in one instalment

£9,000	<p>Two equal payments of £4,500 at the start and end of the course; or</p> <p>Three equal payments of £3,000 during the course; or</p> <p>A flexible payment plan for modular courses ensuring that no more than £4,500 is paid in one instalment</p>
£12,000	<p>Two equal payments of £6,000 at the start and end of the course; or</p> <p>Three equal payments of £4,000 during the course; or</p> <p>A flexible payment plan for modular courses ensuring that no more than £6,000 is paid in one instalment</p>

**Figure 5: Bursary payment schedules for awards at £12,000 or less for trainees on part-time or modular courses**

## Bursary awards of £15,000 or more

9. Bursary awards of £15,000 or more for part-time or modular may be paid in instalments in the same way as smaller awards. However, awards for full-time courses, these instalments should be weighted to incentivise attendance and completion of the course.

10. As with awards of £15,000 or more for full-time courses, the trainee should receive the additional payments at the end of the first half of their programme and on completion. The trainee must be present on the course to receive these payments.

11. Bursary payment schedules for awards of £15,000 or more for trainees studying on part-time or modular courses are shown in [Figure 6](#).

Bursary award	Payment schedule
£15,000	<p>A flexible payment pattern of instalments, the total of which should not exceed £12,000; and</p> <p>One additional payment of £1,500 at the end of the first half of the programme; and</p> <p>A second additional payment of £1,500 on completion of the course</p>
£20,000	<p>A flexible payment pattern of instalments, the total of which should not exceed £15,000; and</p> <p>One additional payment of £2,500 at the end of the first half of the programme; and</p> <p>A second additional payment of £2,500 on completion of the course</p>
£25,000	<p>A flexible payment pattern of instalments, the total of which should not exceed £20,000; and</p> <p>One additional payment of £2,500 at the end of the first half of the programme; and</p> <p>A second additional payment of £2,500 on completion of the course</p>
£30,000	<p>A flexible payment pattern of instalments, the total of which should not exceed £25,000; and</p> <p>One additional payment of £2,500 at the end of the first half of the programme; and</p>

	A second additional payment of £2,500 on completion of the course
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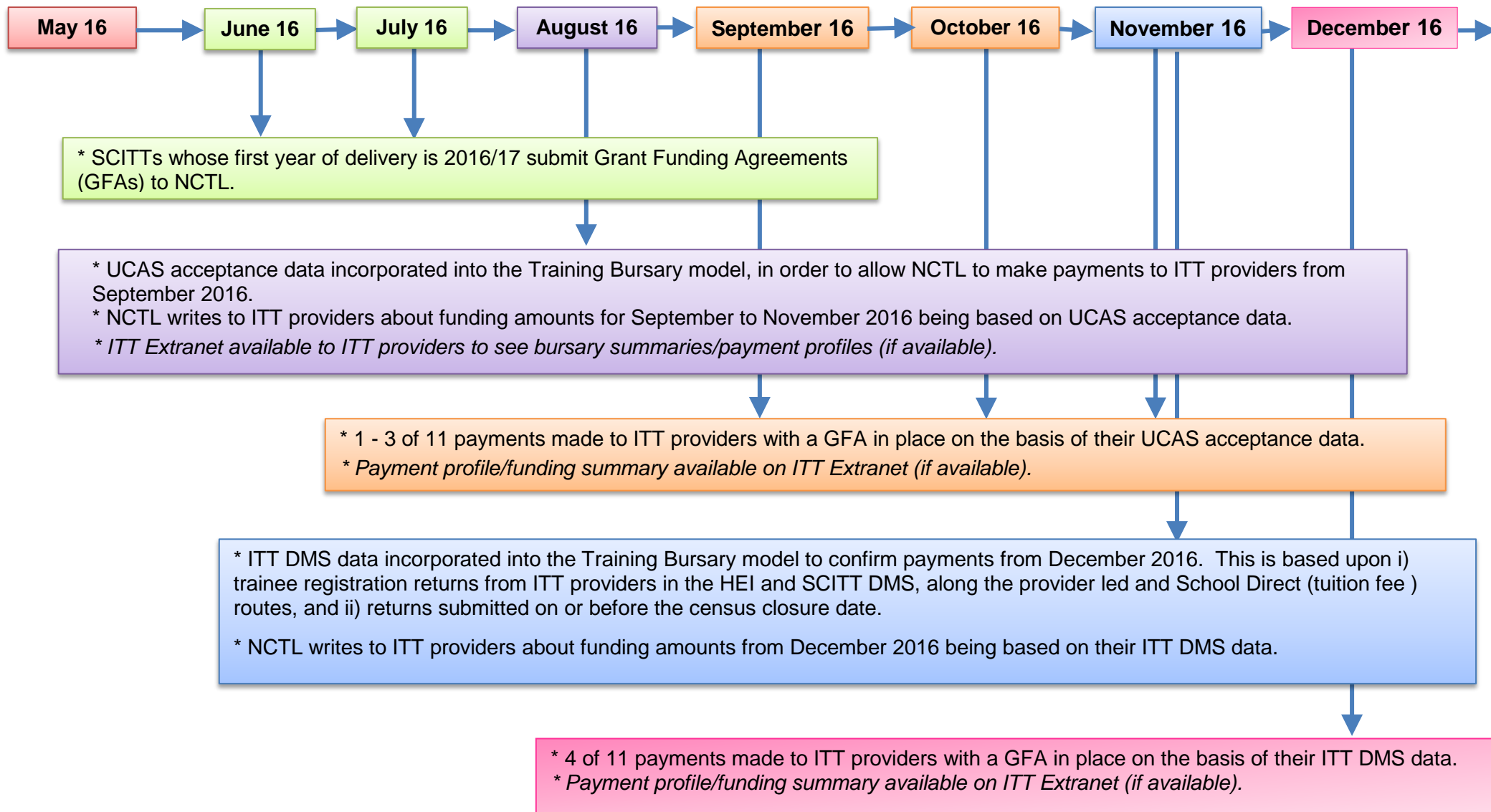
**Figure 6: Bursary payment schedules for awards at £15,000 or more for trainees on part-time or modular courses**

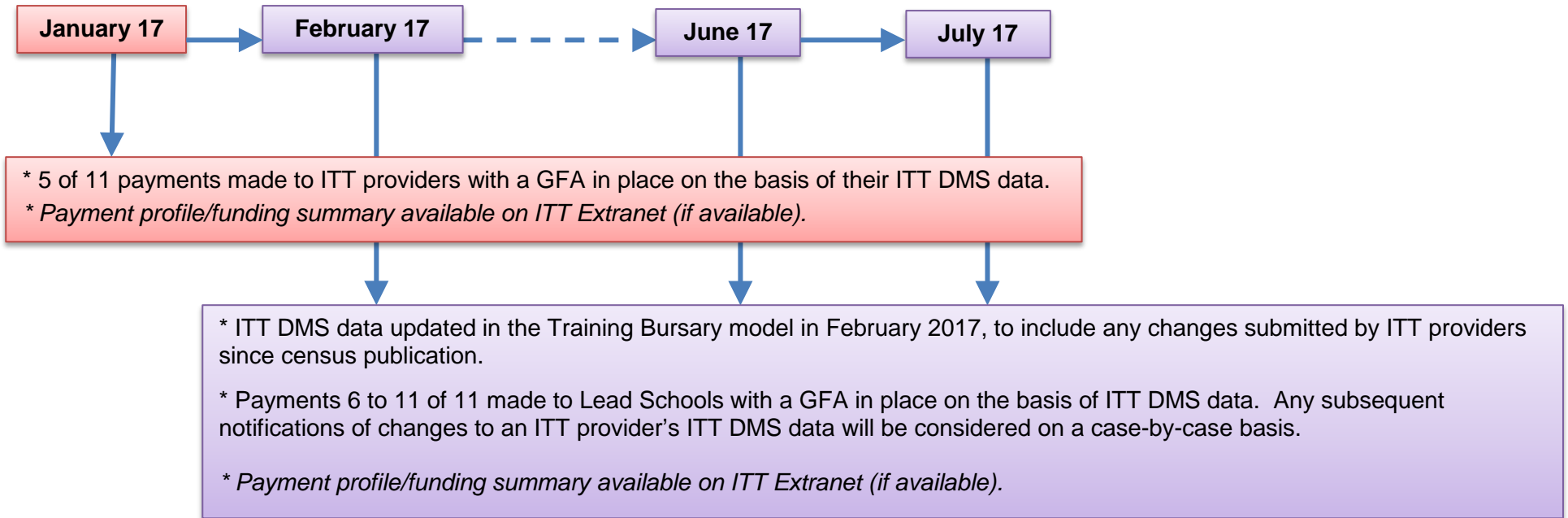
## Scholarships

12. The payment of scholarships should mirror the patterns for bursary awards of equivalent value on full-time and part-time courses, as appropriate.

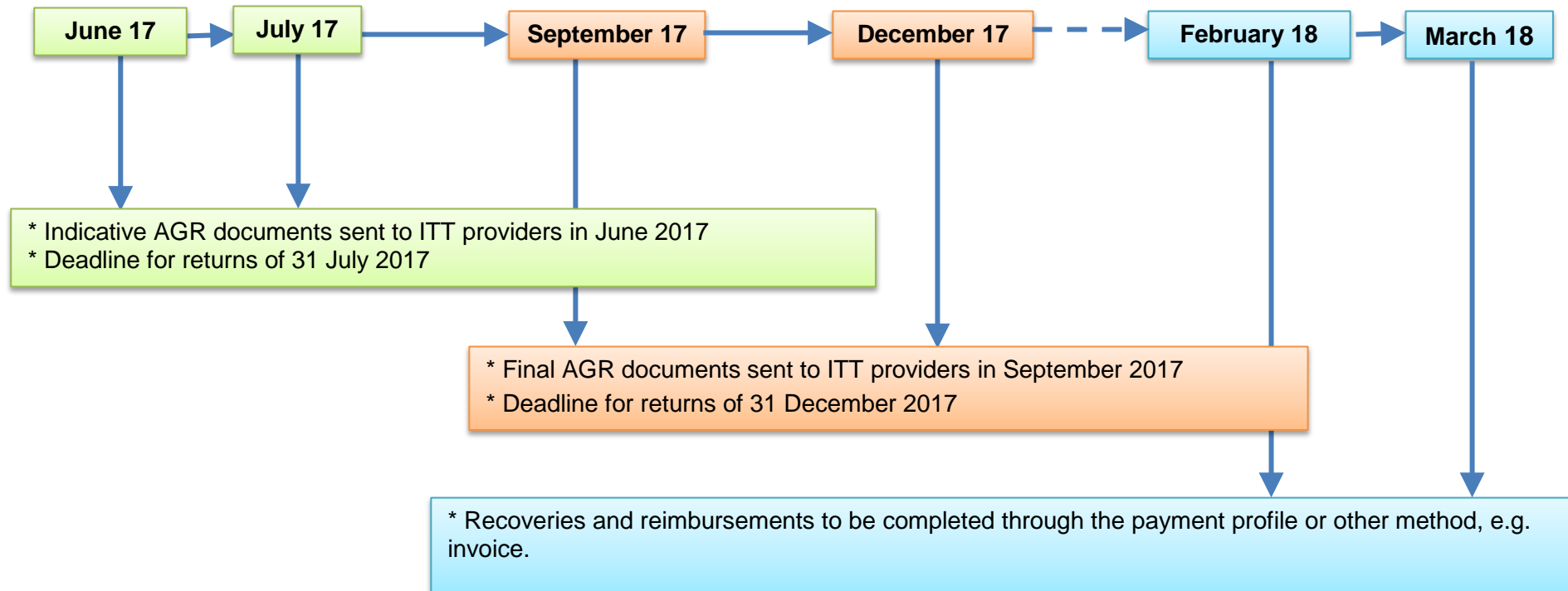


## **Annex F: Training Bursary funding cycle**





## Annex G: Audit Grant Report (AGR) process





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