National College for Teaching & Leadership

Initial Teacher Training bursaries funding manual

2018 to 2019 academic year

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Contents

Table of figures 4

1. Introduction 5

Overview 5

2. Training bursary award and eligibility 6

Eligibility 6

Eligible ITT subjects 7

Primary mathematics specialist (and specialism) 10

Undergraduate bursary 10

Secondary mathematics early-career payments 11

3. Eligibility for training bursaries 12

(a) Eligibility for UK student support. 12

(b) UK first degree 12

(c) Qualifying ITT course in England 13

(d) Determination and notification of eligibility 13

(e) Terms and conditions of the bursary 13

(f) Possession of, or eligibility for, QTS 14

(g) Paid teaching work 14

(h) Undertaking other ITT courses or training schemes 15

4. Admissions 16

5. Teaching outside of England after the award of QTS 17

6. School Direct (tuition fee) courses 18

7. Scholarships programme 19

8. Bursary and scholarship payments 21

Withdrawals/Deferrals 21

Returning trainees 21

9. Monitoring, assurance and data requirements 23

Monitoring and Assurance 23

Data requirements and reporting 24

Data requirements for schools 24
HEI providers 25
Non-HEI providers 25
10. ITT allocations and funding 26
Annex A: List of subjects eligible for a bursary 27
Annex B: Assessing UK academic qualifications 28
Honours and ordinary bachelor's degrees 28
Medical first degrees 28
List of eligible academic qualifications 29
Doctoral and master's qualifications 31
Master's degrees 31
Integrated master's degrees 31
Doctoral degrees 32
Annex C: Assessing overseas qualifications 33
Overseas degree equivalency table 33
Qualifications not included in the equivalency table 33
Grading not included in the equivalency table 34
Countries not included in the equivalency table 34
Overseas master's and doctoral degrees 34
Annex D: Value and timing of training bursary payments 36
Payments for full-time courses 36
Payments for part-time or modular courses 37
Scholarships 39
Annex E: Training Bursary funding cycle 40
41
Annex F: Audit Grant Report (AGR) process 42

Table of figures

Figure 1: Financial incentives for those who train in the 2018 to 2019 academic year – Scholarship subjects 7

Figure 2: Financial incentives for those who train in the 2018 to 2019 academic year – Non-scholarship subjects 8

Figure 3: Equivalent qualifications for bursary award eligibility 30

Figure 4: Bursary payment schedule for full-time trainees 36

Figure 5: Bursary payment schedules for trainees on part-time or modular courses 39

1. Introduction

1.1 This guide is for School Direct lead schools and initial teacher training (ITT) providers[1] 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 2018 to 2019 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 high quality graduates into 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 Figures 1 and 2 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 £28,000 for trainees on physics, computing, chemistry, geography and languages and £22,000 in secondary mathematics 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.

[1] School-centred initial teacher training providers (SCITTs) and higher education institutions (HEIs).

2. 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. Figures 1 and 2 sets out the training bursary rates for the 2018 to 2019 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 English will be eligible for a £26,000 training bursary if they are training to teach physics, and £15,000 if training to teach English. 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 concerns training bursaries available for trainees starting courses in the 2018 to 2019 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

	ITT subjects[1]					
Highest qualification[2]	**Physics**	**Secondary mathematics[3]**	**Computing**	**Languages**	**Geography**	**Chemistry**
Scholarship[4]	28,000	22,000	28,000	28,000	28,000	28,000
Trainee with first class or doctoral degree	26,000	20,000	26,000	26,000	26,000	26,000
2:1 or master's degree	26,000	20,000	26,000	26,000	26,000	26,000
2:2	26,000	20,000	26,000	26,000	26,000	26,000
Other degree award	-	-	-	-	-	-

Figure 1: Financial incentives for those who train in the 2018 to 2019 academic year – Scholarship subjects

	ITT subjects[1]					
Highest qualification[2]	**Classics**	**Biology**	**Design and technology**	**English**	**History, RE or music**	**Primary mathematics[5,6]**
Scholarship[4]	-	-	-	-	-	-
Trainee with first class or doctoral degree	26,000	26,000	12,000	15,000	9,000	6,000
2:1 or master's degree	26,000	26,000	9,000	15,000	4,000	6,000
2:2	26,000	26,000	-	15,000	-	6,000
Other degree award	-	-	-	-	-	-

Figure 2: Financial incentives for those who train in the 2018 to 2019 academic year – Non-scholarship subjects

[1] Training bursary amounts shown in GBP (£).

[2] 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.

[3] Secondary mathematics trainees will be eligible for two additional early-career payments of £5,000 each (£7,500 if teaching in specified areas of England) in their third and fifth year of teaching, if they have taught in a state-funded school in England since completing their ITT course. For more information please refer to the mathematics early-career payments guidance.

[4] Trainees in secondary mathematics, physics, chemistry, computing, geography and languages with a 2:2 or above are able to apply for a teacher training scholarship with the appropriate professional body.

[5] Trainee teachers in primary mathematics courses, i.e. primary mathematics specialist or specialism (including primary-general (with mathematics)), with at least a B at A level in mathematics (or equivalent) will be eligible for a bursary of £6,000 if they hold a 2:2 or above. Eligibility can be determined from Figure 3.

[6] Trainee teachers on a primary mathematics specialism course (including primary-general (with mathematics)) who do not have at least a B at A level in mathematics (or equivalent), will not attract a training bursary.

A full list of designated ITT subjects and NCTL funding can be found in Annex A.

2.6 A scholarship award of £28,000 is available in physics, chemistry, computing, geography and languages and £22,000 in secondary mathematics. A scholarship award replaces a trainee's bursary eligibility.

2.7 Physics, secondary mathematics, chemistry, computing, languages, geography, classics, biology, English, primary mathematics specialists and primary-general (with mathematics) 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 Figures 1 and 2.

2.8 Design and technology, history, music and RE 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 does not attract a training bursary in academic year 2018 to 2019.

Primary mathematics specialist (and specialism)

2.9 The primary mathematics bursary is available to trainees on primary mathematics specialist or specialism courses (including primary-general (with mathematics)). 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.

2.10 The eligibility requirements for the primary mathematics specialist course are the same as those for the primary mathematics bursary, i.e. all trainees must meet the A level requirement. Therefore, all trainees on the primary mathematics specialist course will receive the primary mathematics bursary, at a level determined by their degree class.

2.11 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.

2.12 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.

Undergraduate bursary

2.13 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 2018 to 2019 academic year, and is payable in the final year of their course.

2.14 The same £9,000 training bursary is available to trainees on an opt-in secondary undergraduate mathematics, physics, computing or modern foreign language course that leads to QTS. The bursary is available to undergraduate trainees who enrol on a QTS course in the 2018 to 2019 academic year, and is payable in the final year of their course.

2.15 Trainees who are on an 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 penultimate and final years of their course.

Secondary mathematics early-career payments

2.16 Secondary mathematics trainees who start an eligible postgraduate ITT programme in academic year 2018 to 2019 will receive two additional early-career payments of £5,000 each (£7,500 if teaching in specified areas of England) in their third and fifth year of teaching, if they have taught in a state-funded school in England since completing their teacher training course. These amounts are after tax, so teachers will receive the full amount as stated. For more information please refer to the mathematics early-career payments guidance.

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;

b) hold a UK first degree or equivalent;

c) be taking a qualifying postgraduate or undergraduate 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) not be in possession of, or eligible 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. 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.

(c) Qualifying ITT course in England

3.6 To be eligible to receive a bursary, the trainee must be recruited to a qualifying postgraduate or undergraduate ITT course in England. A qualifying course must:

- lead, upon successful completion, to a recommendation, on behalf of the trainee, to NCTL for the award of QTS[2];
- be delivered by an institution accredited by NCTL as an ITT provider (which may be in partnership with a school for School Direct courses); and
- have been granted an allocation of places and/or permission to recruit from NCTL, in accordance with the ITT allocations methodology for academic year 2018 to 2019. Lead schools and ITT providers will only attract funding in the subjects identified in Annex A.

(d) Determination and notification of eligibility

3.7 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.

3.8 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

3.9 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 they expect to seek a teaching post in England on successful completion of their course.

[2] Courses that enable a trainee to be recommended for the award of Qualified Teacher Learning and Skills (QTLS) upon successful completion are not eligible for training bursary or scholarship funding.

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

3.11 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.

3.12 If a trainee is found to be ineligible for the bursary, NCTL will recover any bursary payments made by the ITT provider. The ITT provider must make all reasonable efforts to recover bursary payments from the trainee.

(f) Possession of, or eligibility for, QTS

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

3.14 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.

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

3.16 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.

3.17 Individuals who hold Early Years Teacher Status (EYTS) are also still 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 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 or more schools or institutions; or
- carry out one or more of a range of specified activities at one or more schools or institutions.

3.19 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.

3.20 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.

3.21 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 courses or training schemes

3.22 To be eligible for a 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. Teaching outside of England after the award of QTS

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 in Annex C.

6. School Direct (tuition fee) courses

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 2018. Any queries relating to the completion and submission of this data should be directed to HeiDmsSupport@texunatech.com in the case of HEIs and dmssupport@texunatech.com for non-HEIs.

7. Scholarships programme

7.1 NCTL works 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 £28,000 scholarship available for trainees on physics, chemistry, computing, geography and languages courses and £22,000 for trainees on secondary mathematics 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, secondary mathematics, chemistry, computing, geography or languages ITT place by 1 September 2018 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.[3]

7.6 It is not necessary for applicants to secure a physics, secondary mathematics, chemistry, computing, geography or languages 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 partnership remains responsible for selecting trainees for courses regardless of their recommendation for a scholarship. Recommendation for a scholarship

[3] Courses that enable a trainee to be recommended for the award of Qualified Teacher Learning and Skills (QTLS) upon successful completion are not eligible for training bursary or scholarship funding.

does not override, or take priority over, the eligibility criteria as set out in Section 3. Trainees must meet all the eligibility criteria to receive the scholarship funding.

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 throughout the academic year as detailed in Figures 4 and 5.

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 D.

Withdrawals/Deferrals

8.4 Eligible trainees who withdraw or defer from a course may be entitled to be paid the training bursary for each month up to, and including, the month in which they formally withdrew.

8.5 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. ITT providers should not make any pro rata training bursary payments to trainees.

8.6 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 in the Data Management System (DMS) detailing the formal withdrawal date. NCTL will clawback any overpayments made to ITT providers after the trainee has withdrawn or deferred, and will not reimburse ITT providers that pay the training bursary in error to trainees. NCTL expects ITT providers to recover any bursary overpayments from trainees.

Returning trainees

8.7 Returning trainees who defer and then rejoin their original course, or take any advanced standing or credit to a new ITT course, will only be eligible to receive the remaining bursary award, up to the value which was available in the year they started their original course. A bespoke payment schedule may be agreed for the remaining amount between the ITT provider and trainee.

8.8 Where the length of the course is increased, the bursary instalments can be amended to reflect the longer timeframe. The total bursary amount, however, is fixed and cannot be increased.

8.8 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, subject to the eligibility criteria and rates set in this guidance.

8.9 If the trainee received their full bursary entitlement during a previous ITT programme, this may impact their eligibility to receive bursary funding while completing a new programme in academic year 2018 to 2019. Please contact the Funding Team at ITT.Funding@education.gov.uk for further advice.

9. Monitoring, assurance and data requirements

Monitoring and Assurance

9.1 NCTL has a responsibility to ensure that public funds and assets generated from the allocation of ITT places are properly managed in line with the grant funding agreements held by ITT providers.

9.2 ITT providers will be required to demonstrate that they have administered all bursary funding in accordance with their grant funding agreements, including the achievement of the following objectives:

- Select and recruit the highest quality candidates to programmes of ITT;
- Design and deliver high quality programmes of ITT;
- Rigorously assess trainees against all of the relevant standards for QTS, and only support the recommendation of those trainees that have been deemed to have met them;
- Demonstrate propriety and adequate controls in your financial management, and comply with relevant financial reporting or governance requirements;
- Comply with the NCTL data requirements and requests as stipulated in all NCTL guidance; and
- Pass on 100% of the training bursary funding issued to you under this agreement to the trainee in order to support them to achieve the aims set out above.

9.3 ITT providers must hold full records of all trainees in receipt of bursaries, including evidence 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 this evidence at any point during the academic year from ITT providers, for the purpose of monitoring quality and funding assurance. This may include copies of original documentation provided by trainees, including qualification certificates.

9.4 NCTL will use the annual and interim census data collections and the annual audit grant reporting process, Annual Grant Return (AGR), to seek rigorous assurance about the bursaries allocated by an ITT provider. The ITT provider's accounting officer will be required to verify these data sets. We will will issue more detailed guidance regarding the Annual Grant Return at the end of academic year 2018 to 2019.

9.5 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 recover the excess by means of invoice or by offsetting against future payments.

9.6 ITT providers are reminded of the need to ensure that all trainee records on the NCTL's ITT DMS are complete. This includes amending the records of trainees who withdraw or defer from their ITT programme, those trainees that start later in 2018 to 2019 and trainees returning from earlier academic years. NCTL reserves the right to delay or withhold payments if data is inaccurate or incomplete.

9.7 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 for 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.

9.8 All ITT providers will be asked to complete an Annual Grant Return (AGR) in accordance with published guidance, containing income, expenditure and trainee data, which has to be independently audited and countersigned by the Accounting Officer (Annex F refers). We will use this information to reconcile the funding you have received with your declared expenditure taking into account the effect of withdrawn and deferred trainees. Prior to the AGR we will request an interim return to provide an indicative training bursary expenditure figure so that NCTL know what is likely to be spent on the programme. We will write to you in the Spring regarding the interim indicative return and will issue more detailed guidance regarding the AGR at the end of academic year 2018 to 2019 so that you are able to comply with the Grant Funding Agreement requirements.

9.9 Failure to fully comply with the monitoring and assurance requirements stated in paras 9.1 to 9.8 may result in non-compliance by the ITT provider, which may lead to withdrawal of accreditation.

Data requirements and reporting

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

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

Data requirements for schools

9.12 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 DMS.

HEI providers

9.13 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.

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

9.15 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 to access the HEI DMS.

Non-HEI providers

9.16 Non-HEI ITT providers need to submit trainee-level data. Provider-led 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.

9.17 Full details of the process are available in the NCTL DMS guidance document which is available to users of the NCTL DMS. 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 to access the NCTL DMS.

10. ITT allocations and funding

10.1 The ITT allocations methodology for academic year 2018 to 2019 is now available online on GOV.UK.

Annex A: List of subjects eligible for a bursary

- Primary mathematics, i.e. primary mathematics specialist or primary-general (with mathematics)
- Biology
- Chemistry
- Classics
- Computing
- Design and technology[4]
- English
- Geography
- History
- Secondary mathematics
- Languages
- Music
- Physics
- RE

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

[4] Engineering and food trainees receive a bursary under the design and technology heading.

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 the level 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 3 sets out the eligible academic qualifications and equivalent bursary award.

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

Figure 3: Equivalent qualifications for bursary award eligibility

[1] Honorary doctoral degrees are not recognised.

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

10. ITT providers cannot consider 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 a grade relevant to the training bursary rates for their ITT subject 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 the training course started. If the trainee successfully gains the higher award a retrospective uplift can be applied. Please contact ITT.funding@education.gov.uk for 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.

5. ITT providers must hold full records of all trainees in receipt of bursaries, including details of their assessment of trainees' academic qualifications achieved prior to starting their ITT. NCTL reserves the right to request these details at any point during the academic year from ITT providers, for the purpose of monitoring quality. This may include copies of original documentation provided by trainees, including qualification certificates, and correspondence related to the decision making process.

Qualifications not included in the equivalency table

6. 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.

7. 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

8. 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.

9. Please contact the ITT Funding team at ITT.funding@education.gov.uk if the data in the overseas degree equivalency table suggests that a grading should be available for the trainee's degree, but the trainee was not issued with a final grade.

Countries not included in the equivalency table

10. 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 must try and use their own professional judgement in the first instance to determine the equivalency of the qualification.

11. 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. ITT providers can contact the ITT Funding team for further advice at ITT.funding@education.gov.uk

Overseas master's and doctoral degrees

12. 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.

13. 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 Figures 1 and 2.

14. 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.

15. 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: 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.

2. Full and part-time trainees must be present on the course on the date of each payment, i.e. the date that ITT provider are contracted to make payments to their trainees, to be eligible to receive it.

Payments for full-time courses

3. Bursary awards should be paid in **equal** monthly instalments over the duration of the course, as shown in Figure 4.

Bursary award	Value of monthly instalments (October 2018 to July 2019)
£4,000	£400
£6,000	£600
£9,000	£900
£12,000	£1,200
£15,000	£1,500
£20,000	£2,000
£22,000	£2,200
£26,000	£2,600
£28,000	£2,800

Figure 4: Bursary payment schedule for full-time trainees

Payments for part-time or modular courses

4. Trainees on part-time or modular courses may receive a higher proportion of their total bursary award in any one instalment. However ITT providers must ensure that no more than 50 per cent of the award is transferred in any one instalment.

5. 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.

6. As part-time courses will span more than one academic year, ITT providers may award the bursary beyond the October 2018 to July 2019 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, i.e. 2019 to 2020.

7. Figure 5 sets out the possible payment patterns for trainees on a part-time or modular course.

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

	Three equal payments of £4,000 during the course; or A flexible payment plan for modular courses ensuring that no more than £6,000 is paid in one instalment
£15,000	Two equal payments of £7,500 at the start and end of the course; or Three equal payments of £5,000 during the course; or A flexible payment plan for modular courses ensuring that no more than £7,500 is paid in one instalment
£20,000	Two equal payments of £10,000 at the start and end of the course; or Two payments of £6,666 and one of £6,668 during the course; or A flexible payment plan for modular courses ensuring that no more than £10,000 is paid in one instalment
£22,000	Two equal payments of £11,000 at the start and end of the course; or Two payments of £7,333 and one of £7,334 during the course; or A flexible payment plan for modular courses ensuring that no more than £11,000 is paid in one instalment
£26,000	Two equal payments of £13,000 at the start and end of the course; or Two payments of £8,666 and one of £8,668 during the course; or A flexible payment plan for modular courses ensuring that no more than £13,000 is paid in one instalment
£28,000	Two equal payments of £14,000 at the start and end of the course; or Two payments of £9,333 and one of £9,334 during the course; or

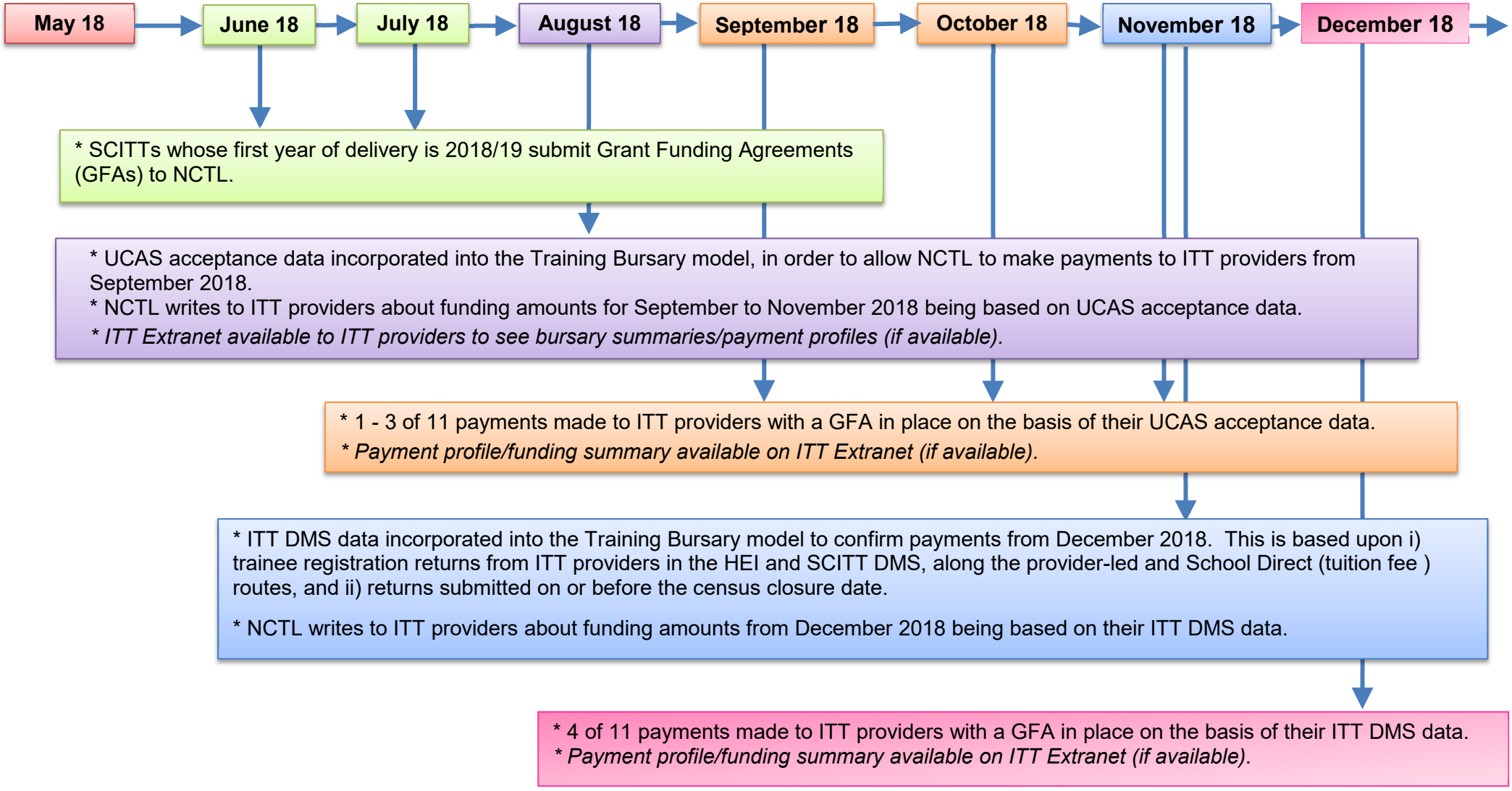
	A flexible payment plan for modular courses ensuring that no more than £14,000 is paid in one instalment

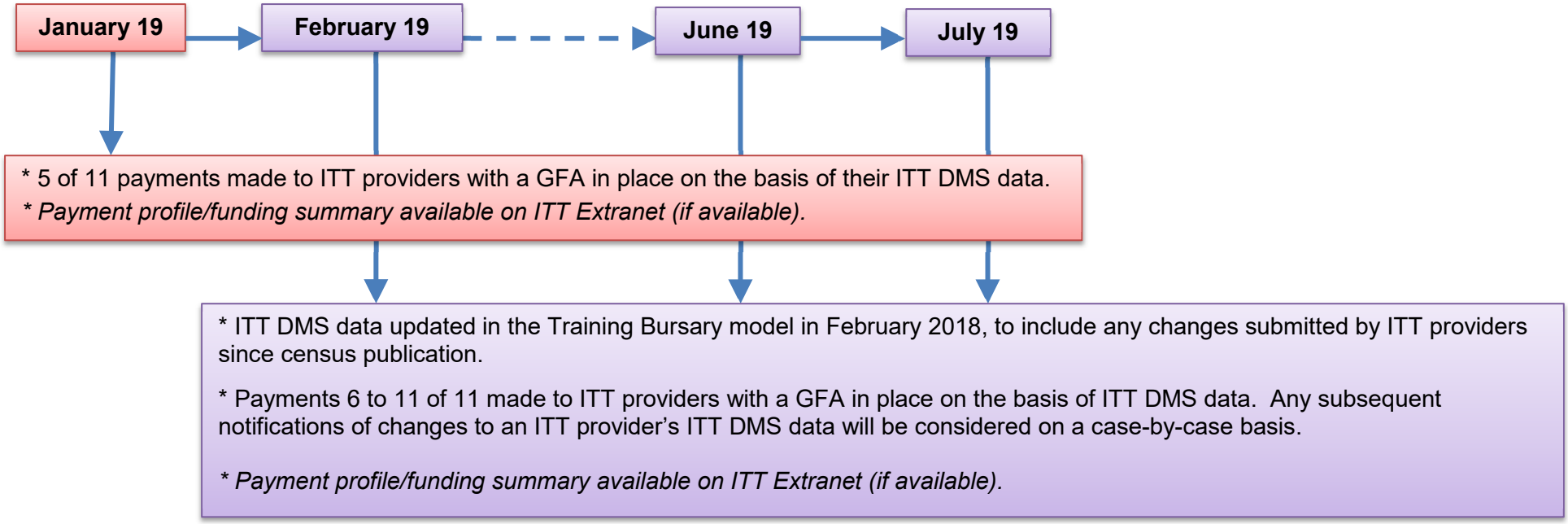
Figure 5: Bursary payment schedules for trainees on part-time or modular courses

Scholarships

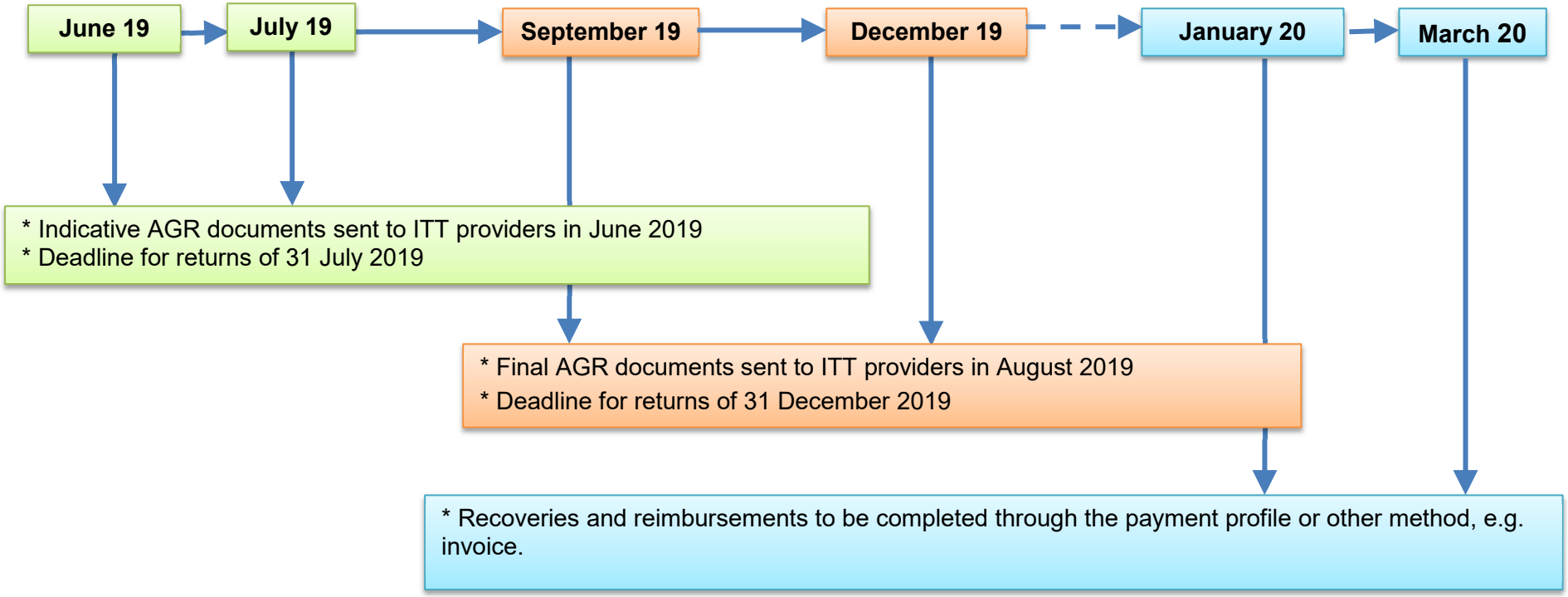
8. The payment of scholarships should mirror the patterns for bursary awards of equivalent value on full-time and part-time courses, as appropriate.

Annex E: Training Bursary funding cycle




January 19
February 19
June 19
July 19
* 5 of 11 payments made to ITT providers with a GFA in place on the basis of their ITT DMS data.
* Payment profile/funding summary available on ITT Extranet (if available).
* ITT DMS data updated in the Training Bursary model in February 2018, to include any changes submitted by ITT providers since census publication.
* Payments 6 to 11 of 11 made to ITT providers with a GFA in place on the basis of ITT DMS data. Any subsequent notifications of changes to an ITT provider's ITT DMS data will be considered on a case-by-case basis.
* Payment profile/funding summary available on ITT Extranet (if available).

Annex F: Audit Grant Report (AGR) process



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