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Please note: this guidance relates only to applicants who started additional specialism courses after **1 May 2009**. These courses are the Mathematics Development Programme for Teachers (MDPT) or the Science Additional Specialism Programme chemistry/physics (SASP).<sup>1</sup>

## Introduction

- 01.** This guide aims to help all administrators involved in the Additional Specialism Incentive Scheme. It provides specific guidance for administrators in:
  - the additional specialism course provider
  - the school where the teacher is employed, and
  - the local authority.
- 02.** There is a flow diagram at the back of the guide, which outlines the process that teachers need to follow to apply for and receive their additional specialism incentives. The following sections provide specific guidance for administrators on the individual steps in this process. The process is similar to the 'golden hello' payment mechanism for newly qualified teachers (NQTs).
- 03.** To apply for an additional specialism incentive payment, teachers need to fill in an application form. They must use the form issued by their additional specialism course provider. If they have lost the form, the teacher should contact their course provider for another copy.
- 04.** The application form has several sections, to be completed by the different people and organisations involved in assessing the application. The form needs to be completed in full by the:
  - additional specialism course provider
  - teacher, and
  - headteacher or deputy headteacher at the teacher's school.
- 05.** Once completed, the form is sent to the local authority responsible for the school's payroll, which fills in the last section of the form and processes the payment. (See paragraph 15 for information about schools that manage their own payroll).

## Background

06. The Additional Specialism Incentive Scheme was introduced in July 2008 as part of a package of incentives to increase the supply of maths, chemistry and physics teachers. The teachers involved will already be teaching the subject for all or part of their timetable. This incentive is designed to encourage them to take part in a significant programme of continuing professional development (CPD) in the relevant subject, designed to increase their effectiveness.
07. The additional specialism incentive is a valuable tool to aid the supply and retention of teachers in maths, chemistry and physics. The Training and Development Agency for Schools (TDA) values the contribution that additional specialism providers, schools and local authorities will make in administering the scheme.

## Guidance for additional specialism course providers

08. The course provider begins the process for an application by giving their course participants an additional specialism incentive application form.
09. Once they are satisfied that a teacher meets the eligibility criteria for the additional specialism incentive (see paragraphs 25-35), the course provider should complete part 2 of the application form and give it to the teacher.
10. For copies of the application form, contact the TDA by e-mail at [cpdincentive@tda.gov.uk](mailto:cpdincentive@tda.gov.uk). However, although the TDA is happy to provide electronic copies, please only give hard copies of the application form to teachers to minimise the risk of fraudulent applications.

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## Guidance for participating teachers

11. Each teacher participating on the course will need to complete part 3 of the form. They will also be responsible for ensuring that their course provider and headteacher or deputy headteacher complete remaining appropriate sections of the form, in readiness for sending to the local authority.

## Guidance for schools

12. Schools are central to the Additional Specialism Incentive Scheme as they assess the eligibility of the teacher's role. Schools should first make sure they are satisfied that the teacher and their contract of employment comply with the eligibility criteria (see paragraphs 25-35).
13. There are two main criteria for schools to consider:
  - **Subject** – the teacher must be employed to teach the subject they took the additional specialism course in, though this can be for any proportion of their timetable, and
  - **Type of school** – the school must be a maintained secondary school (including middle-deemed secondary schools), a maintained or non-maintained special school, or an academy in England.
14. Once they are satisfied that the teacher complies with the eligibility criteria, the headteacher or deputy headteacher will need to complete part 4 of the teacher's application form and pass it to their local authority.
15. If the school manages its own payroll (for example, foundation schools or academies), it should pay the teacher the additional specialism incentive and arrange for the local authority to reimburse the money. Schools in this situation are encouraged to liaise with the local authority before making any payments. Then, if required, the local authority can assess the eligibility of the claim and advise whether a payment should be made. In exceptional circumstances, these schools can claim reimbursement direct from the TDA. See paragraphs 21-22 for the amount and other details of the payment.

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## Guidance for local authorities

16. When the local authority receives the application form from the school, they should assess the claim against the eligibility criteria (see paragraphs 25-35) relating to:
  - the timing of the application
  - the teaching post, and
  - the accreditation gained.
17. If any part of these eligibility criteria is not satisfied, the teacher cannot claim an additional specialism incentive.
18. Please check the full eligibility guidance to assess each application. These can be found in paragraphs 25-35 of this document, and also in part 1 of the application form.
19. Once the local authority has assessed the application and confirmed the teacher's eligibility for a payment, the local authority should fill in part 5 of the application form and make the payment.

### Reciprocal agreements with Wales

20. Unlike the Golden Hello Scheme, there is no reciprocal agreement between England and Wales for the Additional Specialism Incentive Scheme.

### Making payments

21. **The payment amount will be £5,000.** It is subject to both tax and National Insurance contributions but is not pensionable or consolidated.
22. The additional specialism incentive should be paid in one instalment through the teacher's salary. It should be shown as a separate entry on the wages slip.

### Reimbursement from the TDA

23. The TDA will reimburse local authorities for additional specialism incentive payments they make. To claim these reimbursements, send a claim form to Finance Office, Training and Development Agency for Schools, City Tower, Piccadilly Plaza, Manchester, M1 4TD.

Claim forms can be downloaded from  
[www.tda.gov.uk/sciencecpdcourse](http://www.tda.gov.uk/sciencecpdcourse)

or

[www.tda.gov.uk/mathscpdcourse](http://www.tda.gov.uk/mathscpdcourse)

The claim form is updated from time to time, so local authorities should check the website regularly to make sure they are using the current version.

24. Please make claims on a regular basis, rather than saving them up to make bulk claims.

**The TDA will reimburse local authorities for additional specialism incentive payments they make.**

## Eligibility criteria for additional specialism incentive payments

25. Eligibility criteria are used in assessing all applications for TDA additional specialism incentive payments, so all applicants and administrators should read and refer to them. This document only relates to additional specialism courses that started after 1 May 2009.
26. To be eligible for an additional specialism incentive payment a teacher must comply with:
- **application eligibility criteria** – relating to the timing of the application
  - **teaching eligibility criteria** – relating to their teaching post, and
  - **accreditation criteria** – relating to completion of the course and accreditation gained.
27. If any part of these eligibility criteria is not satisfied, the teacher cannot claim an additional specialism incentive payment.

### Application eligibility criteria

28. Teachers must make sure their application reaches the local authority within 36 months of completing the taught element of their additional specialism course.
29. This application time can be extended to 48 months if, during that time, the teacher is pregnant or has full-time caring responsibilities, or is certified by a doctor as medically unfit to work as a teacher for any period.

### Teaching eligibility criteria

30. The teacher must be a qualified schoolteacher with qualified teacher status (QTS), awarded by the General Teaching Council for England (GTCE).
31. They must be employed as a qualified schoolteacher in England in:
- a maintained secondary school (including middle-deemed-secondary schools)
  - a maintained or non-maintained special school, or
  - an academy.<sup>2</sup>
32. The teacher's employment contract must be either permanent or a fixed-term contract for at least one term.
33. Their teaching post must require them to teach the subject in which they have gained an additional specialism for all or part of their teaching time.
34. The teacher must continue to be employed in an eligible role until they receive the additional specialism incentive payment. As the payment can only be made through the standard local authority payroll, they must stay in their job for at least the period from application to payment. If they leave before receiving their additional specialism incentive payment, they will forfeit the payment. If this happens, the teacher may reapply for an additional specialism incentive payment in the future, as long as they fully satisfy the eligibility criteria – including the application eligibility – at the time of their new application.

### Accreditation eligibility criteria

35. The teacher must have successfully completed their additional specialism course<sup>3</sup> and gained at least 40 honours level credits on the course. This accreditation must be valid within the National Qualifications Framework (NQF) or Framework for Higher Education Qualifications (FHEQ).

### Additional information

36. Supply teachers are eligible for additional specialism incentive payments on the same terms as permanent teachers, as long as they have a contract with a school or local authority for at least one term. Supply teachers employed by private agencies are not eligible.
37. Teachers at city technology colleges (CTCs) may attend an additional specialism course, but they are not eligible for incentive payments under the scheme. CTCs are expected to meet the costs of the incentive payments from their standards fund. However, they are not required to do so. Teachers should check with the relevant CTC on its policy for paying additional specialism incentive payments.
38. Unlike the Golden Hello Scheme, there is no reciprocal agreement outside England for the additional specialism incentive payments. So teachers in Wales or other countries are not eligible for these payments.

**Teachers must make sure their application reaches the local authority within 36 months of completing the taught element of their additional specialism course.**

<sup>2</sup> Teachers teaching in other settings such as independent schools or colleges of further education will not be eligible to receive the financial incentive unless they are teaching maths, chemistry or physics in a maintained secondary school (including middle-deemed-secondary schools), maintained or non-maintained special school or academy at the time of claiming the incentive and they meet all other eligibility criteria.

<sup>3</sup> Course providers will need to consider whether participants have offered sufficient evidence of the learning outcomes (listed in the course specification) to be considered to have successfully completed the course.

# Flow diagram of the application process

- Action phase
- Key decision phase

