

funding manual

Training Bursary

for academic year 2011/12



developing people, improving young lives

Update

Please be aware that as of 1 April 2012 the TDA will cease to exist in its current form and will reopen as part of a new Executive Agency of the Department for Education (DfE). The new Executive Agency will be called the Teaching Agency and will be responsible for ensuring the supply of high quality teachers and training, and for teacher regulation. We will update all providers and funding manuals when further information becomes available about any impact this may have on funding.



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Award and entitlement

This section gives an overview of the training bursary award, who it is for, and how it should be used.

Overview

1.1 The training bursary is a financial aid awarded to eligible trainees to assist with their costs during training. Eligible trainees must be on selected postgraduate courses, subject knowledge enhancement (SKE) courses, or designated undergraduate courses to receive this funding. The bursary awards and associated subjects relating to the academic year (AY) 2011/12 can be found at the end of this funding manual. The rates contained within this manual are relevant to AY2011/12 only and do not provide assurances about any future training bursary rates.

Postgraduate training bursary

- 1.2 Training bursary awards for trainees on postgraduate initial teacher training (ITT) courses will depend on their ITT phase and the subject specialism of their course. The award is not dependent on the length of the course.
- 1.3 From 1 August 2011, postgraduate training bursary rates and eligible subjects have been revised. This is to reflect the need to recruit trainees to maths, science, modern foreign languages and engineering.

Subject knowledge enhancement

- 1.4 Subject knowledge enhancement (SKE) bursaries are for trainees on designated SKE courses. The courses are designed to help potential trainees gain the depth of knowledge needed to enter ITT in their chosen subject. The SKE bursary is measured in units and providers will receive funding based on the total number of units they have been allocated. In August 2010, the bursary rates for SKE courses were revised to reflect the emphasis on physics, chemistry and mathematics.
- 1.5 Bursary rates for subjects in the group B category have been reduced. There continues to be no bursary associated with short SKE courses consisting of fewer than four units within this subject group.
- 1.6 The current bursary rates associated with SKE courses can be found at the end of this funding manual.

Undergraduate financial support

- 1.7 Undergraduate financial support is offered to trainees undertaking a designated two-year full-time undergraduate ITT course, leading to qualified teacher status (QTS) in maths, physics or chemistry.

Award and entitlement

Entitlement

- 1.8 The current rates for training bursaries will apply to eligible trainees who started their course after 1 August 2011.
- 1.9 Trainees who started before 1 August 2011, and are returning to their course after a period of deferment or suspension, are entitled to receive a bursary award based on the subject and academic year in which they started their ITT.
- 1.10 For guidance on bursary rates for previous academic years please refer to the TDA Website (<http://www.tda.gov.uk/ittfunding>) or contact the funding team at **ITTfunding@tda.gov.uk**

Allocation of funding

This section sets out the process for allocating training bursary funding and making payments to providers.

Allocation of training bursary funds

- 2.1 The training bursary funding allocation includes the postgraduate ITT training bursary, SKE and undergraduate financial support, and will cover all training bursary funding for these courses. If providers find that they are paying more training bursary funds than they have been allocated, the TDA will increase the allocation to ensure that providers have sufficient funds to cover the payments.
- 2.2 The TDA uses data on providers' historical spending patterns to allocate their training bursary funds, including both bursaries for SKE and undergraduate financial support. This ensures providers receive training bursary funding on a realistic and informed projection of how the TDA expects providers to use their funding, and to minimise adjustments after audit.
- 2.3 Training bursary funding will be allocated to providers by calculating an average of their historical training bursary expenditure for the last two academic years. This average spend will then be used to calculate the training bursary funding allocated to the provider. For example, a provider who historically spends an average of 70 per cent of their total training bursary will receive that percentage of their total training bursary allocation.

Funding for extra trainees

- 2.4 The TDA recognises that trainees who interrupt or defer their studies may come back to complete their course, therefore providers may experience greater recruitment and retention than in previous years.
- 2.5 In such cases, the TDA will guarantee to increase a provider's training bursary funding if their original allocation appears to be low. Providers should contact the TDA at ITTfunding@tda.gov.uk to discuss arrangements where they are experiencing pressures to their training bursary budget.

Payments to ITT providers

This section sets out the process for the administration and payment of the training bursary to providers.

Payment to providers

3.1 Training bursary funding will be paid to providers electronically by BACS and will be included in the monthly ITT payment at the start of each month.

3.2 Providers will receive their training bursary funding over a 12-month period, from August to July, in monthly instalments. The size of the instalments may vary but the TDA aims to pay 60-70 per cent of training bursary funding from August to March, with the remaining balance paid over the following four months.

3.3 Payment profiles can be viewed on the TDA Extranet at <https://ittprovider.tda.gov.uk>

3.4 For access to this site, please e-mail ITTfunding@tda.gov.uk

Administration and VAT

3.5 In addition to the training bursary funding that providers receive, the TDA will also allocate a separate amount of administration funding to assist with the cost of managing training bursary payments. This is now set at a flat rate per allocated place, with a protection level for providers with lower allocations.

3.6 Providers who have registered their VAT details with the TDA will also receive a VAT payment on this amount. Under exceptional circumstances the administration fee may cover a contribution towards the costs of Student Finance England's higher education bursary scheme (if they are charging higher fees). This funding is not ring-fenced.

3.7 The administration funding and corresponding VAT contribution may change in line with adjustments to training bursary funding. The current training bursary administration rates can be found at the end of this funding manual.

3.8 Providers who have training bursary funding for SKE, and designated undergraduate ITT courses are expected to follow the same procedures and guidelines for administering their bursaries as they would for the postgraduate ITT training bursary.

Payment to trainees

This section sets out the process for the administration and payment of the training bursary to trainees.

Payment to trainees

- 4.1 Providers should only make payments to trainees who meet, and continue to meet, the eligibility criteria as set out in this funding manual.
- 4.2 Providers have flexibility with the timing of the bursary payments to trainees but are expected to pay the training bursary no later than the fifth working day of each month. Providers must ensure that the profile of payments is in line with the guidance below and meets the trainee's needs.
- 4.3 In exceptional circumstances trainees could experience financial hardship in the event of student support payments, such as maintenance loans and grants, being delayed. In such circumstances, providers may increase the proportion of their training bursary instalments and/or change the timing of payments in order to support these trainees. Any additional payment must not result in the trainee being paid in excess of the total bursary entitlement and should be managed to avoid creating financial pressures at the end of the course.
- 4.4 For courses shorter than one month, providers should pay trainees their bursary award at an appropriate point during the course. For SKE courses, providers will ensure that the total funding is paid according to the unit length of the course.
- 4.5 Providers must inform their trainees well in advance of commencing their course about how and when their training bursaries will be paid.

Payments for part-time and modular routes

- 4.6 Providers can be flexible in managing the bursary awarded to trainees on part-time or modular routes, but must ensure that it does not have a negative financial impact on the trainee.
- 4.7 Providers may wish to pay the training bursary to the trainee in two or more instalments for the duration of their course, or in equal monthly instalments. If the bursary is to be paid in instalments,- then no more than 50 per cent of the bursary award should be paid to the trainee in each half of the course.

Payment to trainees

Course type	Method of payment
One-year full-time postgraduate course	Bursary award spread out in equal monthly instalments for the duration of the trainee's course
Part-time postgraduate course	Bursary award spread out in equal monthly instalments for the duration of the trainee's course, or in two or more lump sums, none of which exceeds 50 per cent of the total available bursary
Two-year full-time undergraduate course	Bursary award spread out in equal monthly instalments for the duration of the trainee's course
Subject knowledge enhancement course	Total amount will depend on the number of units. Payment should be made in equal monthly instalments where appropriate. Payment for short courses should be made at an appropriate point in the course
Additional experience bursary course	Payment should be made at an appropriate point during the additional experience

Changing modes of study

- 4.8 Trainees who move from one mode of ITT course to another will be subject to the payment rules that apply to the new course.
- Providers will manage the changeover to the new payment structure so that the financial impact on the trainee is minimal.
 - Providers must ensure the trainee is not overpaid when compared to other trainees in a similar position under the same payment structure.
 - Providers are expected to inform the trainee in good time of how their payments will be adjusted.

Changing subject

- 4.9 Trainees who move from one subject to another will receive the applicable bursary rate. Providers must inform these trainees of the change in rate should they change subject and, if switching to a lower bursary rate, must ensure that future payments are spread out evenly to enable the trainee to manage their costs. Providers should ensure that payments for trainees who attract a higher bursary rate after changing subject are managed sensibly to align with others on the same subject of study.
- 4.10 Further guidance is available in this manual on how to identify science specialists with regard to administering the training bursary.

Payment to trainees

Withdrawals

4.11 Eligible trainees who withdraw from their course are entitled to be paid the training bursary for each month up to, and including, the month in which they withdrew. Trainees will only be entitled to receive the bursary payment for that month if they were still on the course at the time the payment was made.

4.12 In the event of withdrawal, the provider must suspend all bursary payments to the trainee immediately and ensure that their records are updated to reflect the withdrawal. The TDA will not reimburse providers who have paid the training bursary in error to trainees who have already withdrawn. The TDA expects providers to recover any overpayment of the bursary from trainees. Providers should not make any pro rata payments of training bursary payments to trainees.

Returning trainees

4.13 Returning trainees who leave and then re-join their course will normally only be eligible to receive up to the value of the bursary award applicable in the year they started the 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, providers should contact the TDA for further guidance.

4.14 If a trainee leaves one ITT course and joins a new one and carries with them advanced standing or credit from their previous ITT course, then this is viewed as a single route to qualified teacher status (QTS). Therefore the trainee will only be eligible for a training bursary up to the value agreed at the start of their course.

4.15 Where trainees are not charged a tuition fee, because they are either repeating or returning after withdrawal, they will not be eligible for a new bursary award.

4.16 If a trainee does not take any advanced standing or credit from the previous ITT course, and is being charged a new tuition fee, this is viewed as a separate route to QTS. The trainee will normally be eligible to receive the full amount of bursary as stated in the tables at the end of this funding manual.

4.17 Providers are asked to exercise their judgement when accepting onto their course, students who have previously embarked on a route to QTS against new applicants with no experience of ITT.. Providers must be satisfied that these trainees will be able to gain QTS if accepted onto the course.

Audit and adjustment

This section sets out the process for auditing training bursary expenditure and making adjustments to recover any under-spend.

External audit of ring-fenced funding

- 5.1 As part of their financial memorandum agreement with the TDA, all TDA accredited providers are expected to undertake a full audit of their annual expenditure of ring-fenced funds up to 31 July. This is to ensure that providers are operating all training bursary payments in accordance with the terms and conditions provided by the TDA.
- 5.2 Providers must ensure that the audit is verified and signed off by an external auditor as part of their financial memorandum agreement with the TDA and returned to the TDA before 31 December 2011. The training bursary funding is ring-fenced and therefore cash expenditure of providers' total training bursary funding allocation should be reported in their audited accounts.

Expenditure and reporting

- 5.3 Providers should report only cash expenditure of all training bursary funding for trainees in their audited accounts, inclusive of SKE and undergraduate financial support. This does not include the administration fee paid to providers to assist in administering the postgraduate bursary, or any associated VAT payments.
- 5.4 Providers should not include anything paid after 31 July. The TDA will not include accruals in this total expenditure. Any under-spend as a result of withdrawals, deferrals and suspension of payment must be accounted for. Providers must not retain funds in anticipation of trainees returning to their studies.
- 5.5 The TDA will recover, in full, any unused funding in line with the audited accounts received from providers. This will be done by offsetting the recovery against other payments from the TDA. Training bursary adjustments will take place in the same year that the audited accounts are processed by the TDA.

Eligibility criteria

This section sets out the eligibility criteria for recipients of the postgraduate training bursary award, and guidance on trainees who become ineligible whilst on a course.

Postgraduate bursary eligibility criteria

6.1 To be eligible for the training bursary an ITT trainee must, from the first day of training, meet and continue to meet the eligibility criteria set out below. If at any point the trainee becomes ineligible, providers should suspend payment of the bursary immediately. This includes trainees who started their course and were subsequently found by the General Teaching Council (GTC) to be unsuitable after provisionally registering with them.

6.2 The eligibility criteria to receive the training bursary are that an ITT trainee must:

- meet the requirements for entry onto a postgraduate ITT course
- not already be qualified as a school teacher
- not already be employed in a school or institution as a teacher
- not be undertaking any other ITT course or training programme
- be an 'eligible student' for the provision of student support
- be informed by their ITT provider that they are eligible
- be taking a qualifying ITT course, and

- comply with the terms and conditions of the new bursary scheme.

Eligibility criterion 1

The ITT trainee must meet the requirements for entry onto a postgraduate ITT course.

6.3 In order to satisfy eligibility criteria, the trainee must meet all entry requirements as laid down by the Secretary of State for Education. These can be found on the TDA website at www.tda.gov.uk/qts Trainees must be put forward for provisional registration with the GTC within 28 days of starting their ITT course. Eligibility for the bursary will be pending on the success of the registration

Eligibility criterion 2

The ITT trainee must not already be qualified to be a school teacher.

6.4 ITT trainees who are already qualified to be a school teacher on the first day of their ITT course are not eligible for the training bursary. ITT trainees who qualify as a school teacher during the period of their ITT course become ineligible from the date on which they qualify. ITT trainees will be deemed to be qualified as a school teacher, and therefore ineligible for the training bursary, if:

- they have been or are awarded QTS by the GTC

Eligibility criteria

- they have not been awarded QTS by the GTC, but meet one or more of the descriptions of ‘qualified teacher’ set out in paragraphs 2–13 of part 1 of schedule 2 of the Education (School Teachers’ Qualifications) (England) Regulations 2003, no 1662, or
 - they do not meet the descriptions of a ‘qualified teacher’, but could do so without the requirement to undertake a further ITT course against the specified standards for the award of GTS, set out in paragraphs 2–13 of part 1 of schedule 2 of the Education (School Teachers’ Qualifications) (England) Regulations 2003.,
- 6.7 This definition of a school 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.
 - 6.8 The definition of a qualified school teacher includes qualified teachers who do not have full registration with the GTC, as well as qualified school teachers who are fully registered. Qualified teachers who do not have full registration may include qualified teachers who have failed to complete an induction period satisfactorily.
 - 6.9 The definition of a school 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. Under this definition, school teachers are permitted to carry out one or more specified teaching activities, including delivering lessons and assessing the development, progress and attainment of pupils. Please review these regulations for full definitions of specified teaching activities.

Eligibility criterion 3

The ITT trainee must not already be employed in a school or institution as a teacher.

- 6.5 Trainees who are already employed as a teacher in a school or institution after the start of their ITT course become ineligible to receive the bursary from the date they start this employment.
- 6.6 ITT trainees are deemed to be employed as a school teacher if they are employed under a contract of employment or services with one or more local authorities, governing bodies or institutions to:
 - be the headteacher or principal of one or more schools or institutions, or
 - carry out one or more of a range of specified teaching activities at one or more schools or institutions.
- 6.10 The specified teaching activities described above may count as teaching practice that leads towards the assessment of QTS. Providers must ensure that they communicate to their trainees that if they undertake paid work in schools, that this constitutes teaching practice leading towards the assessment of QTS and they will become ineligible for the bursary.

Eligibility criteria

6.11 The definition of a school or institution includes schools maintained by a local authority, non-maintained special schools, city colleges (city technology colleges or city arts colleges), academies, independent schools, further education institutions, sixth-form colleges and higher education institutions (HEIs). This definition does not include pupil referral units or establishments maintained by a local authority for a social services function.

6.12 If a provider needs further clarification of a trainee's role, they must ask the trainee to contact their employer for a statement of their job title and role. This can then be used against the guidance to determine whether they are eligible for the training bursary.

Eligibility criterion 4

The trainee must not be undertaking any other ITT course, training scheme or programme

6.13 To be eligible for the training bursary, ITT trainees must not be undertaking any other ITT course, training scheme or programme leading to qualified teacher status (QTS).

Eligibility criterion 5

The ITT trainee must be an 'eligible student' for the provision of student support.

6.14 To receive a training bursary the ITT trainee must meet one or more of the definitions for being an 'eligible student' to receive grants and loans towards tuition fees and living costs as set out in the eligible student schedule of the current

Education (Student Support) Regulations, found at www.legislation.gov.uk

Eligibility criterion 6

The ITT trainee must have been notified by the provider of their ITT course that they are eligible.

6.15 The provider of the ITT course will determine whether a trainee is eligible to receive a bursary and whether they continue to receive it.

6.16 The ITT trainee must be informed in writing, by their provider that they are eligible. They do not become eligible until the date the ITT provider has made that determination and informed the trainee of their decision.

Eligibility criterion 7

The ITT trainee must be taking a qualifying ITT course.

6.17 To be eligible to receive a bursary, the trainee must be taking, and continuing to take, a qualifying ITT course. A qualifying ITT course is:

- a course that, if successfully completed, will enable a trainee to meet the standards for the award of QTS
- a postgraduate ITT course that can only be taken by ITT trainees who already hold a first degree of a UK HEI or equivalent qualification provided by an institution that has been accredited, and remains accredited, by the TDA to provide ITT, and
- principally funded by the TDA.

Eligibility criteria

- 6.18 The TDA is the principal source of funding and accreditation for most ITT courses provided by TDA accredited institutions. These will be qualifying ITT courses for the purposes of determining eligibility for bursaries. However, TDA accredited institutions can provide supplementary ITT courses for which an individual and/or another organisation or body is the principal source of funding. These ITT courses will not be 'qualifying ITT courses' for the purpose of determining eligibility for the training bursary. The only exceptions to this are for trainees in the Channel Islands or Isle of Man. These trainees have their courses funded by their own local government, not the TDA, but this will not prevent them being eligible for the training bursary so long as the trainees satisfy all other relevant eligibility criteria.
- the method by which the bursary payment instalments will be paid, and to make the payments.
- 6.20 It is also a condition of this scheme that an ITT trainee must:
- tell their ITT provider about any material changes to that information, and
 - repay promptly any overpayment of bursary to their ITT provider.

Ineligibility and the bursary

- 6.21 There may be instances when a trainee becomes eligible for the bursary following a period of ineligibility. For example, a trainee may start their ITT course and be eligible for a training bursary, but then go on to undertake a period of paid teaching practice in a school that fits the description of the teaching activities described in the education regulations. This paid teaching practice would make the trainee ineligible for the training bursary. After the trainee finishes their teaching practice, they would then become eligible for the bursary again.

- 6.22 Providers are requested to use their judgement in such instances and reserve the right to suspend payment of the bursary until the trainee has ceased to be ineligible. The trainee must be able to demonstrate that they are once again eligible for the training bursary. If satisfied, providers may then resume payment up to the end of their course. Trainees may not be paid the bursary for periods when they are ineligible and therefore may not be entitled to the full bursary award.

Eligibility criterion 8

The ITT trainee must comply with the terms and conditions of the new bursary scheme.

- 6.19 To qualify, or continue to qualify, ITT trainees must comply with specific requirements. The first of these is to promptly give the provider of their ITT course any required documentation to determine and, if that information or other circumstances change, to re-determine:
- whether the ITT trainee is an eligible ITT trainee.
 - the amount of the bursary payable to them, taking account of any bursary payment they may have received if they are returning to complete their studies
 - the number, size and timings of bursary payment instalments, and

Eligibility criteria

Subject knowledge enhancement

6.23 To be eligible for the SKE bursary, a trainee must be taking a TDA-funded SKE course and have been notified by the provider that they are eligible. Trainees must not be undertaking any other ITT course or training programme. For details on eligibility for entry onto an SKE course please see the SKE funding manual available at www.tda.gov.uk/ittfunding

6.25 The undergraduate financial incentive is only available to trainees on routes agreed by the TDA. These routes will only be in the subjects set out at the end of this funding manual.

Undergraduate additional financial support

6.24 The eligibility criteria for the undergraduate additional financial support package remains the same as criteria for the postgraduate training bursary, with the exception of a trainee on an undergraduate ITT route leading to QTS instead of a postgraduate route.

Postgraduate bursary rates for science

Specialism rates for science courses

- 7.1 Postgraduate chemistry and physics trainees, who are on a designated course with the relevant Graduate Teacher Training Registry (GTTR) code, will continue to receive the higher bursary rate of £9,000. Biology and other/combined science subjects will receive the lower rate of £6,000. Providers should notify trainees of the bursary award they will receive before the start of the course.
- 7.2 To be able to pay the higher bursary rate, providers must ensure their course is approved by the TDA as one that can pay the differentiated bursary rates. In addition, providers must ensure that the trainee will be able to teach the specialist subject to post key stage 3 upon completion of the course.
- 7.3 Providers interested to set up a specialist science course should contact the Quality and Inspection Team (inspections@tda.gov.uk) to ensure that quality and inspection issues are considered when developing such courses.
- 7.4 Providers are expected to make the specialism and content of the course clear to all trainees from the outset and to communicate the bursary rates to trainees before the beginning of the course. Trainees should be aware that, if they move from one course to another, it may affect their bursary payments. Please see the 'Payment to Trainees' section for details on how to change payments to trainees in the event of error.

Training bursary rates

This section sets out the training bursary rates for postgraduate ITT, subject knowledge enhancement and undergraduate additional financial support.

8.1 Standard postgraduate training bursary award rates and phase of study

Bursary Award Rate	ITT Phase of Study	ITT subject specialism
£9,000	Secondary priority	Physics Chemistry Engineering Mathematics
£6,000	Secondary priority	Biology Combined/general science Modern foreign languages
£0	Other Secondary and, Primary	All other subjects

8.2 Undergraduate additional financial support

Bursary award rate	ITT phase of study	ITT subject specialism
£7,000	STEM	Chemistry Mathematics Physics

8.3 Training bursary administration funding

Administration funding will be calculated at £180 per eligible trainee, with a protection level of £2,000 being guaranteed for smaller providers

Training bursary rates

8.4 Subject knowledge enhancement subject groups for AY2011/12

Group	Number of units	Bursary award rate
A	1	£400
	2	£800
	4	£1,600
	6	£2,400
	8	£3,200
	10	£4,000
	12	£4,800
	14	£5,600
	16	£6,400
	18	£7,200
B	1	£0
	2	£0
	4	£1,200
	6	£1,800
	8	£2,400
	10	£3,000
	12	£3,600
	14	£4,200
	16	£4,800
	18	£5,400

Glossary and Contacts

Glossary

BME

Black and minority ethnic

DBIS

Department for Business, Innovation and Skills

EBITT

Employment-based initial teacher training

FEC

Further education college

GTC

General Teaching Council

GTTR

Graduate Teacher Training Registry

SCITT

School-centred initial teacher training

Contacts

ITT funding extranet:

<https://ittprovider.tda.gov.uk>

ITT funding team:

ittfunding@tda.gov.uk