



National College for  
Teaching & Leadership

# **Golden Hello eligibility criteria and guidance for Local Authorities**

**Operations manual financial year 2014-15**

**March 2014**

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**The National College for Teaching and Leadership (NCTL) must receive the claim form within 12 months of the teacher completing their NQT induction. Claims received after 12 months will not be eligible for reimbursement.**

## Section 1 – Introduction

The golden hello is a financial incentive for teachers of priority subjects in a maintained secondary school (including middle-deemed secondary), a maintained or non-maintained special school. It is only available to teachers who trained through a postgraduate initial teacher training (ITT) course leading to qualified teacher status (QTS). In order to be eligible for payment of the golden hello incentive, teachers must meet the training, teaching and application criteria.

This document outlines the eligibility criteria that must be met in order to claim the incentive and explains how NCTL will reimburse local authorities (LAs) for the golden hello scheme in the financial year 2014-15. The eligibility criteria guidance is used to assess all NCTL golden hello applications and should be read by teachers applying for a golden hello, and administrators responsible for assessing claims. This document relates to eligible postgraduate initial teacher training (ITT) courses starting between 1 August 2000 and 31 July 2011.

ITT providers should provide eligible teachers with a golden hello application form upon completion of their ITT. Providers should ensure that only eligible teachers receive an application form.

The NCTL offers LAs ring-fenced funding for the reimbursement of golden hello expenditure incurred during the financial year.

The funding will reimburse costs relating to:

- the gross incentive amounts in accordance with the subject specific rates for that teachers qualifying year, and
- any connected employers Earnings Related National Insurance Contributions (guidance on ERNIC can be sourced from HMRC <http://www.hmrc.gov.uk/rates/nic.htm>).

Where LAs have a contracted payroll provider the request for funds may be completed by them on the LAs behalf providing that the Authorities Section 151 Manager has completed the declaration at part 6 of this manual.

**The Department announced the closure of the golden hello scheme for all trainees starting their initial teacher training (ITT) in the academic year 2011/12 and beyond.**

**Trainees who started their postgraduate ITT course prior to 1 August 2011 will continue to be able to make their application for the golden hello scheme under the current terms and conditions.**

## Section 2 - Eligibility Criteria

In order to be eligible to apply for a golden hello incentive, a teacher must comply with all of the following criteria:

1. Training eligibility criteria: relating to the type of ITT undertaken
2. Teaching eligibility criteria: relating to the type of teaching post occupied
3. Application eligibility criteria: relating to the timing of the application

If any part of these eligibility criteria is not satisfied, the teacher is not eligible to receive a golden hello. Where teachers do not satisfy an element of the teaching eligibility in their original application, they may reapply for a golden hello at a future date. This is provided that they fully satisfy the eligibility criteria, including the application eligibility, at the time of a subsequent application.

### Training (ITT) eligibility criteria

- a) The golden hello is only available to teachers who successfully completed a postgraduate ITT course, leading to the award of QTS in England. Teachers who undertook equivalent postgraduate courses in Wales, Scotland, Northern Ireland or the European Union (EU) may also be eligible for the golden hello as long as they satisfy the criteria set out in the 'payment rates' section.
- b) Teachers who gained QTS through an undergraduate or employment-based ITT route do not qualify for a golden hello. Employment-based ITT routes include the Graduate and Registered Teacher Programmes, the Overseas Trained Teacher Programme, and the Teach First Programme.
- c) The teacher must have taken an ITT course that covered teaching either, or both of, the 11–14 and 14–16 age ranges in an eligible subject.

## Teaching eligibility criteria

- a) Eligible teachers must be a qualified schoolteacher and hold QTS
- b) Eligible teachers must have successfully completed their induction. Visit <https://www.gov.uk/government/publications/induction-for-newly-qualified-teachers-nqts> for further details on induction.
- c) Eligible teachers must be employed as a qualified schoolteacher in England in:
  - a maintained secondary school (including middle-deemed secondary)
  - a maintained or non-maintained special school (see [www.nasschools.org.uk](http://www.nasschools.org.uk) to identify status)
- d) Teachers in independent schools and sixth form colleges are not eligible for the golden hello.
- e) After a teacher has completed their NQT induction, they must have either a permanent employment contract or a fixed-term contract of at least one term's duration. Where the teacher has a permanent contract, they will not be eligible for the golden hello if notice to terminate the contract is given before the golden hello payment is received.
- f) The teaching post held by the teacher must contract them to teach at least 50 per cent of their teaching time in the subject they specialised in during ITT. The teacher must continue to be employed in an eligible role until receipt of the golden hello and must remain in post for at least the period from application to payment. Applicants who leave before payment of the golden hello will forfeit their eligibility.
- g) Supply teachers are eligible for golden hellos on the same terms as permanent teachers, provided that their contract with a school or LA is for at least one term. Supply teachers employed by private agencies are not eligible.
- h) City technology colleges (CTCs) receive funding for golden hellos as part of the standards fund grant, which is included in their unit of funding. Therefore, teachers at CTCs are not eligible for the national golden hello scheme. CTCs are not required to spend their grant on golden hellos but are expected to meet the cost of golden hellos following the same principles as the national golden hello scheme. Teachers should check with the relevant CTC on its policy for paying golden hellos.

## Application eligibility criteria

- a) Teachers must ensure their applications are made to the LA within 12 months of completing their NQT induction, or equivalent, if induction is undertaken in Northern Ireland, Scotland or Wales. NCTL will not reimburse the LA for a golden hello claim after the 12 month induction completion period has passed.
  
- b) This application time is extendable to 24 months in case of pregnancy or full-time caring responsibilities, and for any period during which a person is certified by a doctor as medically unfit to work as a teacher.
  
- c) Applicants must not have previously received a NCTL golden hello in England or the equivalent in Wales.

## Section 3 – Payment Rates

The **rate payable for eligible teachers is dependent upon the academic year the teacher started their ITT course and the secondary subject in which the trainee specialises**. These rates are before tax, National Insurance and student loan repayment if applicable.

Teachers who undertook equivalent postgraduate ITT courses in Wales, Scotland, Northern Ireland or the EU may also be eligible for the golden hello as long as they satisfy the eligibility criteria set out in this document.

Golden hellos are a non-consolidated bonus and are subject to income tax and National Insurance. They are regarded by HM Revenue and Customs as taxable income and teachers repaying student loans might have their repayments increased accordingly. Teachers who are claiming state benefit (working tax credits etc.) are advised to discuss with their local Jobcentre Plus office the impact that the golden hello may have on such benefits.

ITT courses that offer joint subject areas can be considered, but at least 50 percent of the course must be in one of the subjects listed above.

For the purpose of golden hellos, all academic years begin on 1 August and end on 31 July. To be eligible, teachers must comply with the other eligibility criteria set out in this document.

The table below summarises the golden hello amounts that eligible teachers may apply for **based on the academic year of the ITT course and the subject in which they trained and subsequently teach**.

## Payment rates relating to the academic year the teacher started their ITT course

Secondary subject specialism (trained in and taught)	ITT AY2010/11	ITT AY2009/10	ITT AY2008/09
Mathematics	£5,000	£5,000	£5,000
Science	£5,000	£5,000	£5,000
Applied Science	£5,000	£5,000	£5,000
Applied ICT	£2,500	£2,500	£2,500
Design and Technology	£2,500	£2,500	£2,500
Engineering	£2,500	£2,500	£2,500
ICT	£2,500	£2,500	£2,500
Manufacturing	£2,500	£2,500	£2,500
Modern Languages	£2,500	£2,500	£2,500
Music	£2,500	£2,500	£2,500
Religious Education	£2,500	£2,500	£2,500
All other subjects	£0	£0	£0

<b>Secondary subject specialism (trained in and taught)</b>	<b>ITT AY2006/07 and AY2007/08</b>	<b>ITT AY2005/06</b>	<b>ITT AY2000/01 to AY2004/05</b>
Mathematics	£5,000	£5,000	£4,000
Science	£5,000	£5,000	£4,000
Applied science	£5,000	£5,000	£4,000
Applied ICT	£2,500	£4,000	£4,000
Design and technology	£2,500	£4,000	£4,000
Engineering	£2,500	£4,000	£4,000
English	£2,500	£4,000	£4,000
ICT	£2,500	£4,000	£4,000
Manufacturing	£2,500	£4,000	£4,000
Modern languages	£2,500	£4,000	£4,000
Drama, dance and performing arts	£2,500	£4,000	£4,000
Music	£2,500	£0	£0
Religious Education	£2,500	£0	£0
Other subjects not listed above	£0	£0	£0

## Reciprocal agreements with Wales

There is a reciprocal agreement between England and Wales for the golden hello, known as the teaching grant in Wales. The golden hello/teaching grant will be payable to eligible teachers either in Wales or in England, but not in both. The eligibility criterion is that of the receiving country i.e. the country in which you are teaching when you become eligible for payment.

The teaching grants available in Wales for eligible trainees on postgraduate ITT courses for **AY2010/11** are as follows:

- £5,000 Teaching Grant
  - Maths
  - Chemistry
  - Physics
- £2,500 Teaching Grant
  - Information and Communication Technology
  - Design and Technology
  - Welsh

Please note that general/combined science, biology, modern languages, music and religious education do not qualify for the teaching grant. Payments will not be made by the Welsh Assembly Government for any subjects that are not listed above.

Eligible teachers in Wales will need to send their application form with a photocopy of their induction certificate to:

Teaching Incentives Team, Learning Improvement and Professional  
Development Division (Teaching Incentives)  
Department for Children, Education, Lifelong Learning and Skills  
Welsh Assembly Government  
Cathays Park  
CARDIFF  
CF10 3NQ

Teachers who trained on a postgraduate ITT course in Wales may be eligible for a golden hello from the TDA after their first year in a school in England if they satisfy all the eligibility criteria as set out in this document.

Eligible teachers working in England will need to apply to the LA responsible for their payroll.

For teachers who started their ITT course prior to academic year 2010/11, trained in England and satisfy the eligibility criteria as set out in this document will be able to apply to the Welsh Assembly if they take up an eligible post in a Welsh school. The golden hello amount will be dependant on the eligibility criteria set out previously. Eligible teachers in Wales will need to send their application form to:

Practitioners Division 1  
Department for Education  
Lifelong Learning and Skills  
Welsh Assembly Government  
Cathays Park  
CARDIFF  
CF10 3NQ.

Do not submit your claim form until you have actually started work in your eligible post. If you have any queries or would like advice from the Welsh Assembly please call 02920 826749 or email [teachingenquiries@wales.gsi.gov.uk](mailto:teachingenquiries@wales.gsi.gov.uk)

## **Applicants who trained in Scotland and Northern Ireland**

Teachers who trained in Scotland or Northern Ireland on a postgraduate ITT course starting in AY2010/11 may be eligible for a golden hello. These teachers are subject to the same eligibility criteria as those trained in England, outlined in this guidance document.

Eligible teachers will need to apply to the LA responsible for their payroll. The LA must be satisfied that the applicant meets the eligibility criteria set out in this document. Usually the teacher will need to provide the LA with information on their teaching qualification and induction (or the equivalent), their QTS certificate, and written confirmation of their current contract.

## **EU applicants**

Under European Community law, people who have teaching qualifications obtained elsewhere in the European Economic Area that are recognised as equivalent to QTS are entitled to receive a NCTL golden hello on the same basis as English-trained teachers. This is provided that they obtained their qualifications to teach the eligible subject inline with the criteria.

Teachers, who believe they are eligible under these conditions, need to apply to their LA. However, as the teacher will not have undertaken their training in England they will not have an application form. Instead they will need to provide their LA with all the information required to make an assessment. Usually the teacher will need to provide copies of their teaching qualification, their QTS certificate and written confirmation of their current contract. EU applicants must apply for the golden hello within 12 months of receiving QTS.

## Section 4 – Process of Claiming

The process for a teacher to claim and receive their golden hello is:

- The teacher completes their ITT course and is provided with an application form from their ITT provider. Teachers who require a copy of this should contact their ITT provider. NCTL are not able to provide teachers a copy of the application form.
- The ITT provider completes their ITT provider section of the form prior to giving this to the teacher – this section confirms the ITT eligibility criterion.
- The teacher achieves qualified teacher status (QTS).
- The teacher completes their newly qualified teacher (NQT) induction.
- The teacher obtains a teaching post in an eligible school, with either a permanent or a fixed-term contract of at least one term's duration.
- Once the teacher has completed their NQT induction year and obtained a teaching post, their employing school signs off their teaching eligibility before sending it to the LA for assessment and payment.
- The LA submits the pro-form to the NCTL **within 12 months of the teacher completing their induction** via the following email address and in line with the guidance outlined within this document: [TA.LAFUNDING@education.gsi.gov.uk](mailto:TA.LAFUNDING@education.gsi.gov.uk)

**The National College for Teaching and Leadership (NCTL) must receive the claim form within 12 months of the teacher completing their NQT induction. Claims received after 12 months will not be eligible for reimbursement.**

## Section 5 – Payments and Financial Governance

### Outline

The reporting and payment arrangements for the financial year 2014-15 are below and include the NCTL's expectations of governance, internal control and audit.

This is supported by the terms and conditions of the funding section at part 6. LAs are required to accept these by signing and returning them to the address provided. Payments will not be made until this condition has been satisfied.

The Part 6, Terms and Conditions of Grant Funding, should be returned with the first claim submitted.

### Triannual returns and payments

In May, October and February, LAs are required to complete and return a 2014-15 Golden Hello reimbursement claim form, available in the golden hello section of the DfE website.

The completed form should detail the golden hello expenditure incurred during that period. Deadlines for submission are detailed below:

- **Period 1 – Friday 16 May 2014**
- **Period 2 – Friday 17 October 2014**
- **Period 3 – Friday 13 February 2015**

### Financial governance

The triannual claims serve to verify that the expenditure incurred by LAs has been for eligible activities only, as outlined in NCTL documentation.

As such, they must be signed by the Chief Finance Officer (in accordance with his/her responsibilities under section 151 of the Local Government Act 1972).

### Balances brought forward

Previously any payments relating to the financial years 2010-13 (due to use of determined allocated funding granted in 2010-11 financial year) would be immediately offset against reimbursements due in the financial year 2013-14 until no historical amounts are owed by either organisation.

Due to the nature of the claims based approach and the exercise conducted on balances for 2013-14, no balances are expected to be carried forward into 2014-15 or future years.

The NCTL invoiced all outstanding balances to LAs and as such all claims can be considered in full.

## Submitting claims

All triannual claims must be transferred securely in order to comply with the Data Protection Act 1998.

The Data Protection Act does not consider the information to be collected in these returns as 'personal information'. This is because it does not link one or more identifiable living persons with information about them whose release would put them at significant risk of harm or distress.

The NCTL is part of the Government Secure Internet (GSI) domain and our email systems are robust.

We consider the risk manageable and limited in transferring the claim information by email, using the approved form available on the DfE website. As such the NCTL does not require claim information to be encrypted by the sender.

Submissions should consist of:

- an original claim sheet in its Excel form
- a PDF copy of the same sheet signed by the LA Section 151 Manager
- a signed copy of the Terms of Grant Funding (first claim in year only)

## When to claim

Claims by LAs should be sent to the NCTL three times each year, in May, October and February.

The NCTL will not make a payment to any claim in the financial year which is:

- claimed at the incorrect subject rate for that teacher
- made in advance of the teacher being paid by the employer
- claimed when the teacher is not currently employed by the LA
- not supported by a current part 6 financial declaration from the LA

## How to claim

To make a claim the LA should:

- read the guidance on the DfE website for the golden hello initiative
- complete the template claim form on the website
- ensure that a part 6 declaration is completed for the financial year concerned (first claim in year only)
- attach the claim form, a signed PDF copy of that form and part 6 (where required) to an email and send to [TA.lafunding@education.gsi.gov.uk](mailto:TA.lafunding@education.gsi.gov.uk)

The LA should keep the associated claim forms completed by the teacher to meet any potential audit requests from the NCTL or HMRC.

As this is classed as financial paperwork LAs should retain this paperwork as outlined in the HMRC advice note to businesses. This is available at <http://www.hmrc.gov.uk/factsheet/record-keeping.pdf>

## **Section 6 – Terms and Conditions of Funding: 2014-15**

### **Use of the funds**

The funds must be used to cover the declared direct or indirect payment of golden hello incentives to eligible teachers and any associated Employer's National Insurance contributions.

### **Management of the funds**

The LA must have appropriate and effective financial systems in place for the management, accounting and auditing of the NCTL funding.

Reimbursements will be made by the NCTL in accordance with the arrangements detailed in this document. The NCTL reserves the right to change these arrangements.

It is the LAs responsibility to ensure that the NCTL holds both correct bank and contact details for the LA.

### **Contact and reporting requirements**

The NCTL must have a named contact for all matters relating to the funding, and be informed immediately of changes to the named contact.

The LA shall respond promptly to reasonable requests for data and information by the NCTL. The LA will be responsible for the quality of this data.

The LA will provide the NCTL with claims which will detail the expenditure that it has incurred and the expenditure it expects to incur in the remainder of the financial year where possible. The NCTL will provide the LA with a formal pro-forma to complete for this purpose. The LA will ensure that its completed forms comply with the requirements set out in this manual and the form itself.

All reported expenditure will be verified by the LA's Section 151 Officer.

The NCTL reserves the right to audit all claims and/or require the LA to submit independently audited end-of-year returns.

### **Repayment and withholding of payments**

Funding is dependent on the NCTL dispersing funds for this purpose.

The NCTL reserves the right to withhold all, or part, of the funding if the terms and conditions of funding are not met.

The NCTL will reimburse the LA in arrears for expenditure the LA has incurred during the financial year. The NCTL will not make payments in advance of recognised liability.

The NCTL Chief Executive may suspend the payment of funds, either in whole or in part and for any appropriate period if, in the opinion, it is appropriate and reasonable to do so to safeguard public funds.

## Local authority declaration for golden hello funding 2014-15

I declare that I am appropriately authorised to accept the NCTL funding for the purposes given and to sign these terms and conditions on behalf of the local authority. I confirm that the local authority will comply with the NCTL terms and conditions of funding and associated funding arrangements.

LA name:	
Signed:	
Print name:	
Job title:	
Date:	

Please sign and email a scanned copy to [TA.lafunding@education.gsi.gov.uk](mailto:TA.lafunding@education.gsi.gov.uk)

# Annex A – Contact and Useful Information

## Contact information for golden hello at NCTL

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

## Useful Links

Guidance on ERNIC rates:

<http://www.hmrc.gov.uk/rates/nic.htm>

Previous year's eligibility for Golden Hello:

<https://www.gov.uk/government/publications/golden-hello-reimbursement-manual-for-academies-2013-to-2014>

Notes on financial record keeping:

<http://www.hmrc.gov.uk/factsheet/record-keeping.pdf>

## **Annex B – Changes in claims systems and processes for 2014-15**

## **Annex C – Changes in claims systems and processes for 2013-14**

Changes for Financial Year (FY) 2013-14:

- The NCTL will refund LAs on a triannual basis in accordance with eligible expenditure that has been incurred by LAs during the financial year. The dates for the returns have been adjusted though, please see section 2.
- LAs are requested to report details of their expenditure up to 15 June, 15 October and 15 February. The NCTL will reimburse these costs accordingly.
- Academies in LA boundaries will submit claims independently of the LA, directly to the NCTL. The LA is no longer required to substantiate claims made by any academy. Academies who have payroll or finance operations contracted through the LA may still ask the LA to deliver this function. It is a decision the LA must take as payroll provider as to whether they continue to submit in those cases on behalf of that academy.
- The NCTL has registered new email addresses for submissions and queries. Please note the new email addresses at Section 2. The previous contact addresses will no longer work.
- The NCTL no longer asks LA claims to be encrypted due to difficulties experienced between firewalls of various systems.

## Annex D – Glossary

ERNIC	Employers Related National Insurance
GH	Golden Hello
HMRC	Her Majesty’s Revenue and Customs
NCTL	National College for Teaching and Leadership
NI	National Insurance
TA	Teaching Agency
TDA	Training and Development Agency



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