



National College for  
Teaching & Leadership

# **School Direct (salaried) funding manual**

**2016 to 2017 academic year**

**June 2016**

Version 1.1

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## Change log

Version	Published Date	Page	Changes made
1.0	Oct 2015		-
1.1	Jun 2016	4	Table of figures added
		5	Change log moved from Annex E
		6	Footnote added to introduction
		10	QTLS membership body updated
		16	Footnote added to marketing sections
		18	Footnotes added to payments section
		20,21	Further information provided regarding withdrawals, deferrals and reconciliation
		22	Assurance and Audit GFA Annex G thresholds updated
		28	Annex E changed to include Funding cycle

# 1. Introduction

1.1 This manual is a guide to the delivery of funding for School Direct (salaried), an employment based initial teacher training (ITT) programme. It is intended for both schools and ITT providers<sup>1</sup>. It contains information relevant to the 2016 to 2017 academic year only and relates to all School Direct (salaried) places leading to the award of qualified teacher status (QTS).

1.2 This funding manual should be read in conjunction with our [School Direct webpages](#), and the [ITT funding webpage](#) for the 2016 to 2017 academic year. The [Training Bursary Manual](#) for the 2016 to 2017 academic year provides guidance on the funding arrangements for all courses, including School Direct (Tuition fee) programmes that will attract training bursaries in the 2016 to 2017 academic year.

1.3 We may need to make changes to this guidance. If so, we will issue a new version and let schools and ITT providers know.

1.4 Any changes made will be logged in the change log in revised publications.

## Overview

1.5 NCTL pays grant funding for each qualifying trainee on School Direct (salaried) courses. Payments are determined by trainee data submitted by the partner ITT provider and are made in 11 instalments.

1.6 School Direct partnerships are required to meet the full costs of training to qualified teacher status (QTS) and the trainee's salary as they are employed whilst undertaking their training. NCTL provides grant funding to School Direct lead schools to contribute to these costs. The funding for each trainee varies depending on (a) the subject of the trainee's ITT course and (b) the location of the school that employs the trainee. Courses for some subjects will attract no funding.

1.7 Trainees on School Direct (salaried) courses are not eligible for a training bursary and cannot access student finance. The ITT provider must not charge the School Direct (salaried) trainee fees for the award of QTS. Schools and providers should ensure the trainee is aware if there is any expectation that they will be required to pay for any additional academic qualifications (e.g. a Post Graduate Certificate in Education [PGCE]).

1.8 When the trainee's employment starts, the employing school should decide, in collaboration with its partner ITT provider, the teaching duties that the trainee is expected

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

to undertake. The [ITT Criteria](#) specify that trainees on employment-based courses should not be required to perform more than 90 per cent of the teaching duties normally required of a full-time teacher. This limit applies to all School Direct (salaried) courses.

## 2. Criteria and Requirements

### Lead school and partner school eligibility for School Direct (salaried) places

2.1 The lead school is the agreed point of contact for the partnership and holds the partnership's School Direct training places. The lead school is responsible for the funding arrangements for the partnership and is accountable for grant funding received from NCTL and its distribution.

2.2 The lead schools must be either:

- an academy;
- a free school;
- a local authority (LA) maintained school;
- a private school designated as a teaching school;
- a multi-academy trust (if a multi-academy trust is acting as a lead school we would not expect a member of that multi-academy trust to act as a lead school in their own right);
- a pupil referral unit (PRU);
- a sixth-form college; or
- a maintained special school.

2.3 A private school can only act as a lead school if it is also a designated teaching school. Where this is the case, the trainees recruited should benefit from a partnership that includes maintained schools, academies or free schools.

2.4 The partner school is any school working with a School Direct lead school to plan or deliver initial teacher training. A partner school involved in ITT may employ the trainee if it is state funded and may receive funding from the lead school. State-funded partner schools may be the principle training school for any School Direct trainee. Partner schools which are private schools may provide modular training or act as a second placement school but cannot be the employing school.

2.5 Further information on School Direct partners is available in [Annex A](#).

2.6 The lead school cannot be a school subject to special measures under section 44(1) of the Education Act 2005. A lead school that is placed in special measures after the approval of courses by NCTL will need to either:



- find an alternative school to assume the role of lead school if it has recruited trainees; or
- close its courses.

2.7 In the case of the former, the original lead school may remain in the partnership. A lead school which is graded “requires improvement” or “notice to improve” after its courses have approval to recruit from NCTL does not have to relinquish the status of lead school.

2.8 Lead schools must ensure that partner schools in special measures do not recruit or employ School Direct (salaried) trainees.

2.9 Partner schools that go into special measures after a salaried trainee’s employment has begun may retain the trainee provided that:

- the lead school and the ITT provider judge that any risks to the quality of provision are manageable;
- another school within the partnership is able to provide any additional support as necessary; and
- the partnership agreement is amended to reflect the increased support, monitoring and revisions to the individual training plan (ITP) required.

2.10 The lead school must ensure that the partner school in question does not employ any additional salaried trainees while they remain in special measures.

2.11 A lead school will not be disadvantaged if it works in partnership with schools graded “requires improvement” or “inadequate”. These schools are able to offer trainee placements and contribute to the planning and delivery of School Direct courses within a school partnership.

## **Trainee eligibility criteria**

2.12 The lead school must ensure that all funded trainees meet, and continue to meet, the following eligibility criteria. The trainee must:

- a) be taking a qualifying postgraduate ITT course;
- b) be eligible to work in England as an unqualified teacher;
- c) possess at least [Three years’ work experience](#);
- d) not have received an offer for a place on their course if relevant recruitment controls have been applied;

e) not already hold QTS, or be eligible to receive QTS;

2.13 All trainees, regardless of route or funding, must meet the criteria for entry to an ITT programme as set out in the [ITT criteria](#) before they can be considered for the programme. This includes the requirement for all entrants to have passed the professional skills tests prior to entry.

## Eligibility to work

2.14 The lead school must ensure that an applicant is eligible to take up employment as an unqualified teacher in England **before** they are offered a place on a School Direct (salaried) course.

## Three years' work experience

2.15 NCTL will allow schools to accept applications from high quality graduates with less than three years' work experience in hard-to-fill subjects, especially mathematics, physics, chemistry, languages and computing. It will be for schools to decide whether they wish to accept applications from candidates with less than three years' work experience.

## Possession of, or eligibility for, QTS

2.16 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 qualify for funding; those that are unsuccessful in their application to NCTL may be considered eligible.

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

2.18 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.<sup>2</sup> They are therefore not eligible for funding.

2.19 A trainee can still take up a School Direct (salaried) place if they have previously failed an ITT route to QTS; however neither they, their ITT provider nor their lead school will receive NCTL funding for this. Such trainees must be recorded as “Not Fundable” in data submitted to NCTL by the relevant partner ITT provider.

2.20 More information about the award of QTS can be found on the [QTS webpages](#).

## **Changing ITT provider, School Direct partnerships or School Direct route**

2.21 Ordinarily, NCTL will not permit a School Direct lead school to change its identified partner ITT provider once it has registered a course. After a partnership agreement is drawn up and places are advertised to applicants, the lead school should make all reasonable efforts to deliver the course as described. NCTL may however consider a request from a lead school to change a partner ITT provider in exceptional circumstances.

2.22 A lead school must not transfer a trainee from one School Direct partnership to another, or from one School Direct route (salaried or tuition fee) to the other without the prior agreement of NCTL.

2.23 If you require further information about changing any aspect of courses that have been agreed with NCTL, please email [itt.allocations@education.gsi.gov.uk](mailto:itt.allocations@education.gsi.gov.uk). All changes must be confirmed by NCTL before a place is offered to any applicant.

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<sup>2</sup> They must continue to maintain their registration with the ETF for this recognition to be valid.

### 3. Funding rates

3.1 NCTL will pay grant funding to lead schools for each trainee, depending on the subject of their course and location of the school they are employed in.

3.2 The training and salary grant rates that will be paid to the lead school for each trainee can be found below. NCTL will only provide funding for trainees on courses in the identified subjects.

#### Physics and secondary mathematics trainees

Figure 1: Funding for physics and secondary mathematics trainees employed on higher salaries

Funding per trainee (by location)	Amount
National (excluding the London Area)	£25,000
Inner London Area	£29,900
Outer London Area	£28,600
Fringe Area	£26,200

3.3 Higher grant funding is available for physics and secondary mathematics trainees employed by schools on salaries above a specific minimum value. If a trainee is employed on a salary below the relevant minimum value, we will provide funding equivalent to that available for trainees on chemistry, computing and languages courses.

3.4 Lead schools will be required to identify the physics and secondary mathematics trainees who qualify for higher grant funding through the schools [data management system](#).

3.5 The minimum salary values are:

- £25,000 in the Inner London Area;
- £24,000 in the Outer London Area;
- £22,000 in Fringe Area;
- £21,000 in all other areas in England.

These areas are defined in [Annex B](#).

## Chemistry, computing and languages<sup>3</sup> trainees

Figure 2: Funding for chemistry, computing and languages trainees

Funding per trainee (by location)	Amount
National (excluding the London Area)	£19,000
Inner London Area	£23,900
Outer London Area	£22,600
Fringe Area	£20,200

## Trainees in other priority subjects

Figure 3: Funding for trainees in other priority subjects

Funding per trainee (by location)	Amount
National (excluding the London Area)	£14,000
Inner London Area	£17,600
Outer London Area	£16,600
Fringe Area	£14,900

3.6 “Other priority subjects” in this context means:

- biology;
- design and technology;
- English;
- geography;
- history;
- music; and

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<sup>3</sup> Languages include modern foreign languages, community languages and ancient languages (Latin and Ancient Greek). Classics courses where the majority of the course is an ancient language are also eligible for this funding. Other classics courses are eligible for a history grant.

- religious education.

This list is exhaustive.

## Primary general trainees

**Figure 4: Funding for non-specialist / specialism primary trainees**

Funding per trainee (by location)	Amount
National (excluding the London Area)	£9,000
Inner London Area	£11,400
Outer London Area	£10,800
Fringe Area	£9,600

## Primary mathematics specialist and primary mathematics specialism trainees

**Figure 5: Funding for primary mathematics trainees**

Funding per trainee (by location)	Amount
National (excluding the London Area)	£14,000
Inner London Area	£17,600
Outer London Area	£16,600
Fringe Area	£14,900

3.7 This funding is only available for trainees with at least a B in mathematics A Level (or equivalent) and who are registered on primary mathematics specialist or specialism courses.

## 4. Grant Funding Agreements

4.1 All lead schools with approval to recruit to funded School Direct (salaried) courses must enter into a Grant Funding Agreement (GFA) with the Department for Education. NCTL will only release grant funding when a GFA has been signed by the appropriate officer and submitted to NCTL.

4.2 NCTL will make its first payment of grant funding in September 2016. To receive this, all lead schools must have a signed GFA in place by **15 August 2016**. If a GFA is submitted after this date, NCTL will start making grant funding payments in the month after receipt of a valid GFA.

4.3 All lead schools must complete **all** of the highlighted sections in the School Direct (salaried) funding grant offer letter and email this documentation to [GFA.nctl@education.gsi.gov.uk](mailto:GFA.nctl@education.gsi.gov.uk). Together this material will incorporate the lead school's GFA.

4.4 NCTL will write to lead schools in June with further information and guidance on the GFA for the 2016 to 2017 academic year.

### Conditions of grant

4.5 NCTL funds must be used to support the named trainee only. Funding cannot be shared across NCTL-funded and non-funded places.

4.6 Trainees on School Direct (salaried) courses must not be required to pay fees to cover the cost of the QTS award. Schools and providers should ensure the trainee is aware if there is any expectation that they will be required to pay for any additional academic qualifications (e.g. a PGCE).

### Trainees ineligible for grant funding

4.7 Lead schools may, if they so choose, recruit trainees to School Direct (salaried) places who do not meet the trainee eligibility criteria listed in [Section 2](#) and who are therefore ineligible for NCTL funding. This includes trainees who:

- are on courses in subjects that do not attract NCTL funding; and
- are offered a place after recruitment controls are applied.

These trainees must be eligible to work in England as an unqualified teacher and must meet requirements identified in the [ITT criteria](#).

4.8 Such trainees will need to be registered with the Higher Education Statistics Agency (HESA) and on the ITT provider Data Management system (DMS) by the ITT provider but recorded as “Not Fundable by NCTL”.

4.9 Lead schools are not restricted in the number of trainees ineligible for NCTL funding that they recruit but they must be aware of the financial implications for doing so. NCTL cannot be held responsible for any costs associated with recruiting trainees ineligible for its funding.

## **Use of grant funding for marketing**

4.10 Lead schools are permitted to spend up to 1% of their 2015/16<sup>4</sup> academic year School Direct (salaried) grant funding on marketing. Grant Funding up to this limit can be used to publicise School Direct (salaried) courses that the school partnership will seek to deliver in the 2016 to 2017 academic year. Schools partnered with an accredited ITT provider can use their School Direct (tuition fee) funding for marketing activities to support their ITT recruitment strategy. For a complete list of the marketing activity that is permissible, please refer to [the Cabinet Office controls guidance](#) on advertising, marketing and communication and consultancy.

4.11 As part of the Grant Funding Agreement, school partnerships should provide evidence to auditors that any marketing expenditure has been undertaken in connection with their School Direct (salaried) programme. This funding should be used to deliver measureable outcomes relating to the Grant Funding Agreement aims and objectives. The grant funding used for marketing purposes is intended to endorse School Direct (salaried) and School Direct (tuition fee) programmes only.

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<sup>4</sup> The proportion (if any) of 2016/17 School Direct (salaried) grant that can be utilised for marketing expenditure to publicise 2017/18 School Direct will be notified to lead schools later in 2016.



## 5. Payment of School Direct (salaried) funding

5.1 The training and salary grant will be paid on behalf of NCTL by the Education Funding Agency (EFA) to School Direct lead schools (or local authorities for maintained schools) in 11 monthly installments from September to July as set out in [Annex E: Funding cycle](#). The payment will be received within the first five working days of each month. Payment is subject to Grant Funding documentation being received by NCTL and trainee numbers being established from available data.

5.2 The [ITT funding extranet](#) is a web based portal which lead schools will be able access to view their current funded trainee numbers and a breakdown of the funding they will receive. Funding information for the 2016 to 2017 academic year will be accessible on the ITT funding extranet via a secure login. NCTL will write to lead schools to provide login instructions once funding data has been uploaded to the extranet.

5.3 The first payment of the 2016 to 2017 academic year School Direct (salaried) grant funding will be made to lead schools at the beginning of September 2016 where a Grant Funding Agreement is in place and trainee numbers are established from available data. In cases where funding commences in later months, the first instalment will be adjusted to include the missing payments back to September. The lead school will receive the grant in full by the final instalment made in July 2017.

5.4 NCTL will write to lead schools in June 2016 to provide further information and GFA documentation and again in August 2016 to confirm the amounts we will pay for the first three months of the academic year. These payments will be calculated using trainee data available to NCTL at that time and will be based on the location of the lead school.

5.5 Following receipt of verified trainee data from the ITT provider in the October ITT Census, NCTL will adjust the monthly payment amounts that will be paid to lead schools from December 2016 onwards. We will issue any arrears that may be due or recover funding as appropriate within this adjustment. If the relevant data is supplied, this adjustment may also reflect any changes required to grant funding amounts based on the location of the trainee's employing school.

5.6 It is imperative that ITT providers have all the relevant information for trainees to complete the October ITT census. We strongly encourage all lead schools to engage with their partner ITT provider in the supply of census data to avoid any delay in payment.

5.7 If a lead school is an Academy, a Multi Academy Trust or a Free School, the training and salary grant will be paid directly to the lead school's main account by the EFA.

5.8 If a lead school is a local authority maintained school (including voluntary-aided, voluntary-controlled, foundation schools and sixth-form colleges that receive their funding from the local authority), the training and salary grant will be paid to the relevant local

authority by the EFA. Lead schools in this category will need to ensure suitable agreements are in place with their local authority to ensure funding is transferred appropriately.

5.9 For the period of their training all applicants must be employed as unqualified teachers<sup>5</sup> at a school<sup>6</sup>, and (except applicants employed in academies or independent schools) must be paid in accordance with at least the minimum of the unqualified teachers' pay scale for the period of their training<sup>7</sup>.

5.10 Academies and free schools must pay trainees at an advertised rate and fund any shortfall in salary and further costs.

5.11 Lead schools should identify funding arrangements and mechanisms to recover unused funds in written agreements with their partner schools and ITT providers.

5.12 NCTL will not provide any additional funding for the administration of School Direct (salaried) courses.

## **Primary mathematics specialist and primary mathematics specialism courses**

5.13 A higher salary grant is offered for trainees on a primary mathematics specialist or primary mathematics specialism course. The higher grant is payable for trainees on these School Direct (salaried) courses who have at least grade B mathematics A level or equivalent subject knowledge. This higher rate of funding is not available for trainees on a primary mathematics specialism course who do not have at least grade B mathematics A level or equivalent subject knowledge or for trainees on any general (non specialist / non specialism) primary course.

5.14 It is the responsibility of the recruiting organisation, to determine and decide equivalency. NCTL will not determine equivalency for individual cases.

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<sup>5</sup> As defined by the latest School Teachers' Pay and Conditions Document.

<sup>6</sup> Or 'other institution' as defined by the Education (School Teachers' Qualifications) (England) Regulations 2003 (SI 2003/1662) as amended.

<sup>7</sup> Although it is not a requirement for an academy to pay a SD(s) trainee a specific salary rate the criterion states that SD(s) trainees should be employed for the period of their training. This means that SD(s) trainees should be employed for the entirety of their ITT course, regardless of where training takes place. This includes periods of training spent in a second school, contrasting experiences and other training which does not take place at the employing school.

## Maths and Physics Chairs

5.15 The Maths and Physics Chairs programme provides the opportunity for postdoctoral researchers to train and teach mathematics and physics in state-funded schools in England.

5.16 In their first year participants on the programme train as teachers in their host school on a School Direct (salaried) course. For the 2016 to 2017 academic year, ITT places are allocated for the Maths and Physics Chairs programme to lead schools via NCTL's delivery partner.

5.17 These places are treated as standard School Direct (salaried) places, with the same requirements for data reporting and the funding levels as identified in this document. Additional costs associated with the programme, such as salary contributions are funded separately.

## Flexible School Direct (salaried) pilot programme

5.18 Lead schools delivering part-time or abridged courses through the flexible School Direct (salaried) pilot project will receive the same School Direct (salaried) grant funding for each trainee as a full-time equivalent trainee. This will be paid over the course of the same monthly instalment schedule as any other School Direct (salaried) trainee. It is therefore the responsibility of the lead school to ensure the grant funding for each trainee is managed appropriately.

## Data requirements and reporting

5.19 Schools and ITT providers are required to share all data on School Direct with NCTL, including data on applications, recruitment and employment outcomes. School Direct (salaried) grant funding is calculated on the basis of data submitted by ITT providers through HESA and the ITT Data Management System (DMS). It is therefore imperative that data submitted is accurate, complete and submitted on time. Failure to do so will impact on the funding of the School Direct Partnership.

### Data requirements from schools

5.20 Once a candidate has been recruited, lead schools are required to give accurate placement and employing school data to their partner ITT provider.

5.21 Lead schools are required to identify those physics and secondary mathematics trainees who are employed on qualifying salaries for higher grant funding (see Section 2). Instructions on how to do so can be found on the "School Direct (salaried) Programme grant funding uplift" page on the [Schools DMS](#).

## **Data requirements from ITT providers**

5.22 Failure to comply with requests for data in an accurate or timely manner may lead to the withdrawal of accreditation for the ITT provider. Full details of the process are included in the ITT DMS data guidance for HEIs and non-HEIs available through the DMS. Guidance will be updated throughout the academic year.

## 6. Withdrawals and deferrals

### Withdrawals

6.1 Lead schools will receive funding for any trainee who starts and withdraws from a funded School Direct (salaried) course up until the end of the month in which the trainee withdraws. NCTL will either cease funding in year from the following month if the ITT provider has been able to update the trainee data on the ITT DMS, or failing this, as part of a funding reconciliation exercise following the end of the academic year. ITT providers are required to record all trainee withdrawals in the exit information tab on the ITT DMS.

6.2 If a trainee withdraws and the ITT provider updates the ITT DMS with the withdrawal data promptly, NCTL will fund the lead school to the end of the month in which the trainee withdraws. If the ITT provider is unable to update the DMS trainee data with withdrawal data in year, funding will continue and any surplus funding will be recovered by the NCTL from the Lead School after the end of the academic year as part of a reconciliation exercise. The value of funding to be recovered will be calculated on the same basis as the payments that have been made during the academic year (usually over 11 months September - July). For example if a trainee is employed from 1 September 2016 until 15 March 2017, the partnership will retain 7 months' of funding and NCTL will recover 4 months' (April 17 – July 17).

6.3 The total grant that is due to the lead school for the individual trainee will be used to calculate the value of funding to be recovered. For example, if the grant was paid at an inner London / outer London / fringe / national area rate based on the funding area of the lead school, the total sum due based on the funding area of the employing school, which may be different, is used as the basis of the recovery calculation. Where funding ceases in year any further adjustment that is required for different funding areas will be included in the reconciliation exercise.

### Deferrals

6.4 Schools, in agreement with the ITT provider, are responsible for making the decision to allow a trainee to defer. Lead schools must communicate this decision to their ITT provider, who is in turn responsible for reporting this to NCTL through the ITT provider data management system.

6.5 Trainees can only defer once they have started their ITT course and the deferral period is a maximum of one year, in exceptional circumstances the deferral period may be extended to more than one year with prior approval from NCTL. NCTL will only pay the ITT provider up to the maximum training and salary grant rate relevant to the AY in which the trainee starts, regardless of the AY in which they return to the course. ITT providers are required to record all trainee deferrals as dormant periods in the course

details tab on the DMS. The school must retain these funds until the trainee returns to the course. If the trainee does not return to the course, the NCTL will recover these unused funds in full. If the trainee returns to the course, however subsequently withdraws, the NCTL will recover funding on the basis of the total time that the trainee was on his/her course.

## 7. Reconciliation, assurance and audit

### Reconciliation

7.1 A reconciliation exercise will be carried out at the end of the academic year for School Direct (salaried) funding. NCTL will recover any surplus funds identified as a result of this exercise. In most cases, recovery will be carried out by offsetting funding that will be paid to the lead schools in subsequent years. If this is not possible, NCTL will invoice the lead school for the outstanding amount.

7.2 The NCTL will recover grant funding as a result of:

- trainees that leave before obtaining QTS including trainees that accept a place and subsequently withdraw;
- the location of any partner school that employs the trainee in the ITT year being in a lower funding area than the lead School;
- trainees recruited and offered a place after a [recruitment control](#) is in place<sup>8</sup>;
- errors identified in trainee data submitted by schools and ITT providers, upon which the grant funding is calculated and an overpayment results;
- any miscalculation of grant by the Secretary of State which results in an overpayment to the lead School; and / or
- any grant payment made to an incorrect recipient.

7.3 Grant funding may also be recovered as a result of:

- early completion of training; and / or
- non-compliance with the grant funding agreement including but not limited to failure to submit Annex G in accordance with the requirements of the grant funding letter or any subsequent communication from NCTL.

Where a recovery of grant is required, NCTL may recover grant in the same or

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<sup>8</sup> The liability for any trainees will be borne by the lead school/provider in the following circumstances:

- a) where any additional trainees recruited after NCTL has instructed to stop recruiting in a given subject or a reserve recruitment control threshold is met.
- b) where any trainees recruited outside the UCAS teacher training system or not within UCAS guidelines.
- c) where any trainees recruited to courses for which NCTL has not given permission to recruit.

subsequent academic years.

## **Assurance and audit**

7.4 Lead schools are required to submit an annual certification of expenditure to NCTL by 31 December 2017. For lead schools in receipt of grant funding in excess of £40,000 this is found at Annex G(i) of the GFA. For those in receipt of funding less than £40,000, this is found at Annex G(ii) of the GFA.

7.5 As part of the grant assurance process, any marketing expenditure<sup>4</sup> should be presented within a separate line on the payment schedule of Annex G.

7.6 If a school is both a lead school for School Direct (salaried) places and the accredited entity for a School-Centred ITT (SCITT) Provider, it must complete both the NCTL Audit Grant Return and Annex G to the Grant Funding Agreement.

7.7 Further information about this process will be supplied by NCTL in autumn 2017.

## Annex A: Types of organisation involved in School Direct

Organisation	Definition/Role
<b>Lead school</b>	<p>The lead school is the agreed point of contact for the partnership and holds the partnership's School Direct training places. They will be responsible for communications across the partnership to and from the NCTL and between each partner school. The lead school is responsible for the partnership activity. The lead school must be a maintained (primary or secondary), a special school, Sixth form college, a Pupil Referral Unit, an Academy or Free School. Private schools cannot be lead schools unless they are designated as a Teaching School. In School Direct (salaried), the lead school is responsible for the training and salary grant funding and its distribution and for placing of trainees across the partnership. The lead school must agree the location of trainees with the ITT provider.</p>
<b>Partner school</b>	<p>The partner school is any school within the partnership of schools involved in initial teacher training. State funded partner schools may be the principle training school for any School Direct trainee. Partner schools which are private schools may provide modular training or act as a second placement school.</p>
<b>ITT provider</b>	<p>The ITT provider is formally recognised and accredited by the Department for Education in this role. The ITT provider is a full member of the School Direct partnership. As an accredited provider of ITT, it has the experience of delivering teacher training and is accountable for the marketing, selection, assessment and standards monitoring for the trainees. The ITT provider will formally recommend QTS for trainees for the partnership.</p>



## Annex B: Locations used to calculate the value of grant funding

Initial payments of School Direct training and salary grant are based upon the location of the lead school, but actual payment will be calculated on the location of the employing schools and adjusted after the submission to the Data Management System of the trainee record by the ITT provider.

The geographical locations for variation are those set out within the [School teachers' pay and conditions](#):

### Inner London Area

“Inner London Area” means the area comprising the London boroughs of Barking and Dagenham, Brent, Camden, City of London, Ealing, Greenwich, Hackney, Hammersmith and Fulham, Haringey, Islington, Kensington and Chelsea, Lambeth, Lewisham, Merton, Newham, Southwark, Tower Hamlets, Wandsworth and Westminster.

### Outer London Area

“Outer London Area” means the area comprising the London boroughs of Barnet, Bexley, Bromley, Croydon, Enfield, Harrow, Havering, Hillingdon, Hounslow, Kingston-upon-Thames, Redbridge, Richmond-upon-Thames, Sutton and Waltham Forest.

### Fringe Area

“Fringe Area” means:

- a) in Berkshire – the districts of Bracknell Forest, Slough, and Windsor and Maidenhead;
- b) in Buckinghamshire – the districts of South Buckinghamshire and Chiltern;
- c) in Essex – the districts of Basildon, Brentwood, Epping Forest, Harlow and Thurrock;
- d) in Hertfordshire – the districts of Broxbourne, Dacorum, East Hertfordshire, Hertsmere, St Albans, Three Rivers, Watford and Welwyn Hatfield;
- e) in Kent – the districts of Dartford and Sevenoaks;
- f) in Surrey – the whole county; and
- g) in West Sussex – the district of Crawley.

## Annex C: Further information and contacts

### Additional supporting information

Purpose	Location
School Direct information for schools; getting involved and guidance for lead schools	<a href="https://www.gov.uk/government/collections/school-direct-information-for-schools">https://www.gov.uk/government/collections/school-direct-information-for-schools</a>
ITT Extranet	<a href="https://ittprovider.education.gov.uk/login">https://ittprovider.education.gov.uk/login</a>
Schools DMS	<a href="https://dataprovion.education.gov.uk/schdms/page.htm?to-page=schDmsLogin">https://dataprovion.education.gov.uk/schdms/page.htm?to-page=schDmsLogin</a>
School Direct Funding: pages which support and inform types of funding for Initial Teacher Training	<a href="https://www.gov.uk/guidance/funding-initial-teacher-training-itt-academic-year-2016-to-17">https://www.gov.uk/guidance/funding-initial-teacher-training-itt-academic-year-2016-to-17</a>
Degree Equivalency: information on compatibility of qualifications across the World with UK recognised degree standards	<a href="https://www.gov.uk/government/publications/overseas-degree-equivalency-table-and-methodology">https://www.gov.uk/government/publications/overseas-degree-equivalency-table-and-methodology</a>
UCAS teacher training: search and apply for training programmes beginning in 2016	<a href="https://www.ucas.com/ucas/teacher-training/apply-and-track">https://www.ucas.com/ucas/teacher-training/apply-and-track</a>
2016/17 Training Bursary Manual	<a href="https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/501515/Training_Bursary_Guide_AY_2016_17_Final.pdf">https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/501515/Training_Bursary_Guide_AY_2016_17_Final.pdf</a>
Initial Teacher Training criteria	<a href="https://www.gov.uk/government/publications/initial-teacher-training-criteria">https://www.gov.uk/government/publications/initial-teacher-training-criteria</a>
Initial Teacher Training criteria supporting advice	<a href="#">Initial teacher training (ITT) criteria: supporting advice - Publications - GOV.UK</a>

## Contacts

Funding and payment queries should routinely be e-mailed to:

[FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk)

Questions surrounding available places should be e-mailed to:

[ITT.Allocations@education.gsi.gov.uk](mailto:ITT.Allocations@education.gsi.gov.uk)

Queries regarding the Grant Funding letters/agreements should be e-mailed to:

[GFA.nctl@education.gsi.gov.uk](mailto:GFA.nctl@education.gsi.gov.uk)

Queries regarding the October census, or any other data matter, should be e-mailed to the Data team at:

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

Queries regarding ITT funding Extranet access:

[FA.Team@education.gsi.gov.uk](mailto:FA.Team@education.gsi.gov.uk)

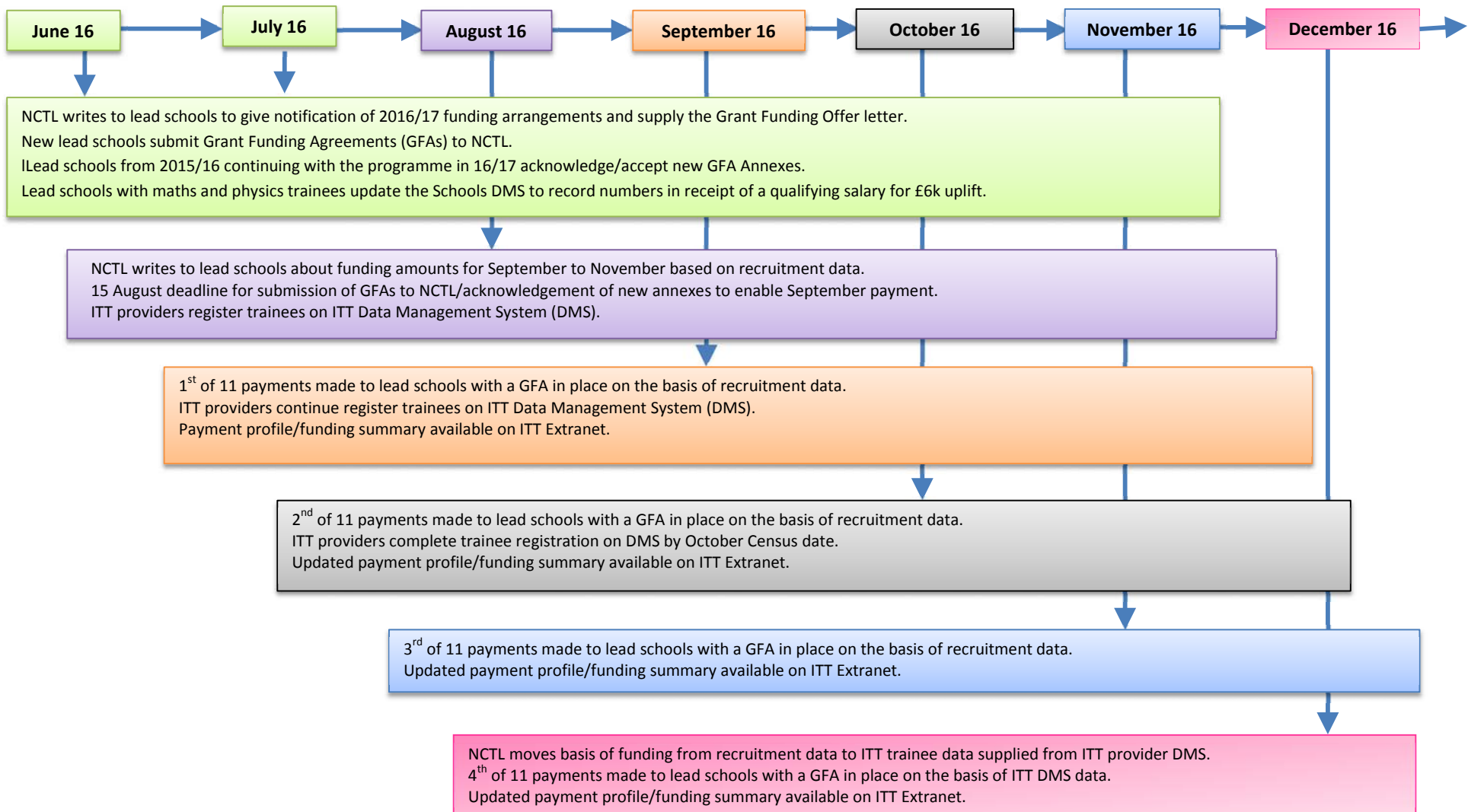
All other School Direct queries not answered on the website should be e-mailed to:

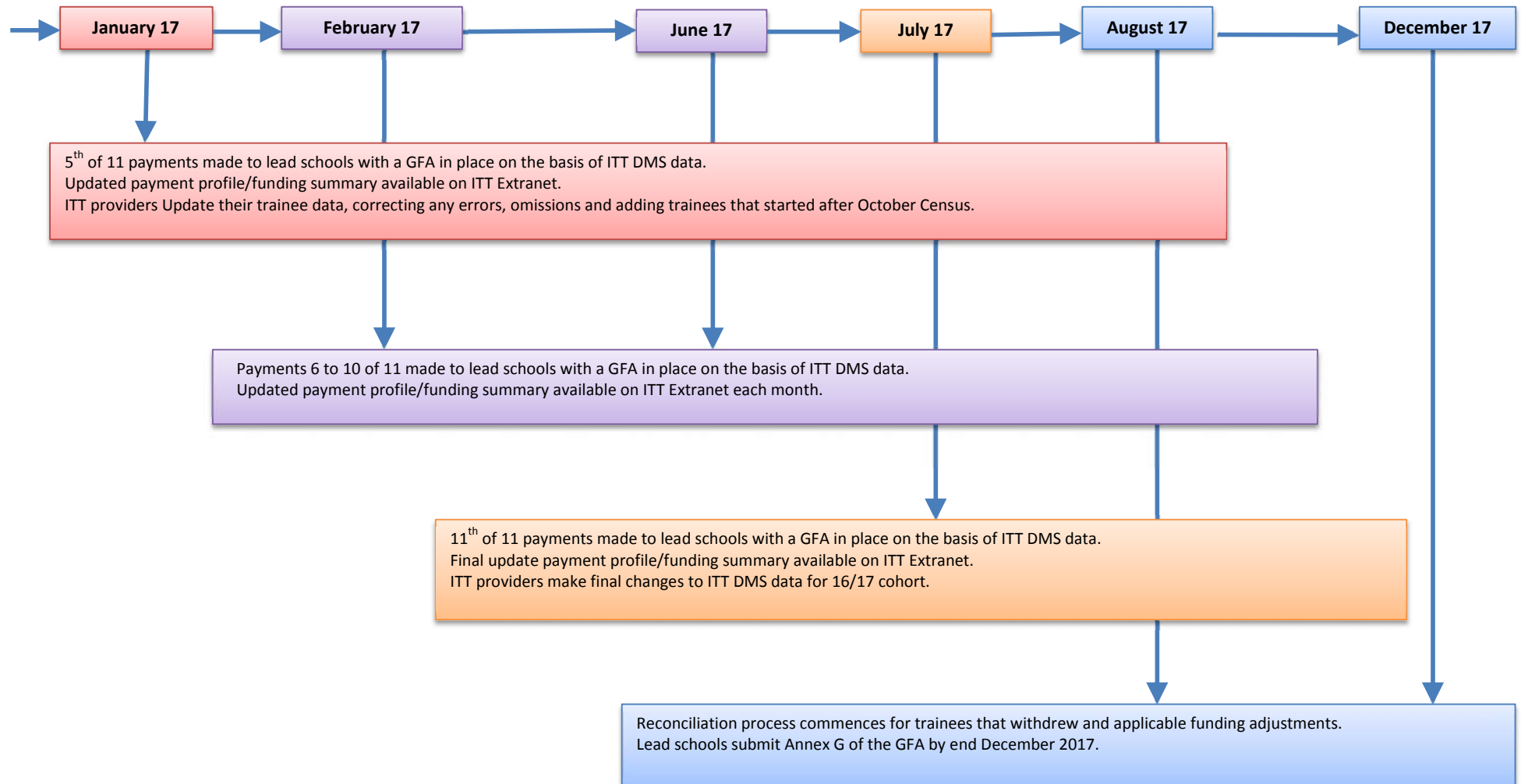
[school.direct@education.gsi.gov.uk](mailto:school.direct@education.gsi.gov.uk)

## Annex D: Glossary

Term	Description
AY	Academic Year
DfE	Department for Education
EU	European Union
HEI	Higher Education Institution
HEI DMS	National College for Teaching and Leadership Data Management System to be accessed by HEI ITT providers
HESA	Higher Education Statistics Agency
ITT	Initial Teacher Training
NCTL	National College for Teaching and Leadership
NCTL DMS	National College for Teaching and Leadership Data Management System to be accessed by Non-HEI ITT providers
PGCE	Post Graduate Certificate in Education
QTS	Qualified Teacher Status
Schools DMS	National College for Teaching and Leadership Data Management System to be accessed by schools
SCITT	School Centred Initial Teacher Training Provider
UCAS	Universities and Colleges Admissions Service (UK)

## Annex E: Funding cycle







National College for  
Teaching & Leadership

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write to Information Policy Team, The National Archives, Kew, London, TW9 4DU

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