



Department  
for Education

# **Further education initial teacher education**

**Mathematics and English programme  
bursary guide:  
academic year 2018/19**

**April 2018**

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# Section 1 – Introduction and overview

## Introduction

1. This guide covers the operational delivery of further education (FE) initial teacher education (ITE) bursaries. Its primary audience is training providers, but it can be used as a source of reference for trainees. This is a live document and subsequent revisions may be issued. The information, training bursary rates, qualifying subjects and associated degree classifications contained within this document are only relevant for trainees starting training during academic year 2018/19.
2. Although there are similarities with the school teacher bursary scheme, this is a separate arrangement.
3. The funding available is limited and will be allocated on a “first come, first served” basis. Early application is therefore advisable for trainees who meet the necessary qualifying requirements. Applications from training providers **must** be received within **six weeks** of trainees starting their course.
4. Applications will only be approved for the subjects of mathematics and English.
5. Training providers should seek assurance from trainees in receipt of a bursary that they understand they are expected to seek a teaching post in FE in England upon successful completion of their course.

## Overview

6. The training bursary is a financial incentive to attract new high-quality graduates to become teachers in the FE sector. Bursary levels will vary according to the specialism in which the trainee wishes to train. Trainees must have at least an upper 2<sup>nd</sup> class or equivalent degree to access a bursary for English and at least a lower 2<sup>nd</sup> class degree for mathematics.
7. The eligibility for bursary awards are detailed in [Section 2](#) of this guide.
8. Training providers will receive monthly payments to pass on to trainees who are eligible for the bursary. The amount of these monthly payments will reflect the total needed to pass on to eligible trainees, in accordance with the schedule set out in [Section 6](#) of this guidance.
9. Bursary funding is limited and once all of the funding has been allocated no more will be available. Training providers should make an application for a bursary for a qualifying trainee on a “first come, first served” basis within six

weeks of the course start date.

10. The total amount of bursary funding will be paid based on the trainee records that training providers submit, which will detail the level of bursary awarded. Training providers will only receive a payment once the Department for Education (hereafter referred to as the department) has confirmation that an eligible trainee has started their training. The amount will be sufficient to cover instalments as outlined in [Section 6](#). Payments will be adjusted in-year to reflect the actual trainee records to take into account any trainee withdrawals from their ITE programme. The bursary application form can be downloaded from [GOV.UK](#). Failure to follow the process will delay payment.
11. The bursary is available to all eligible trainees on eligible postgraduate routes that provide specialist training in English or mathematics. Trainees should hold at least a UK degree or equivalent, with at least a lower 2<sup>nd</sup> class degree or equivalent to be eligible for the mathematics bursary and at least an upper 2<sup>nd</sup> class degree to be eligible for the English bursary. Eligibility status is determined by the training provider and must be established prior to making any decisions on bursary entitlement. More information on eligible trainees and routes is available in [Section 2](#) of this guide.
12. Where the trainee has a degree from outside the UK, training providers may find the information about 'overseas equivalence in [Annex B](#) helpful in reaching a decision about overseas degree equivalence to UK degree classification.
13. Training providers must distinguish between eligibility for the bursary and eligibility for a postgraduate ITE route at their institution. **Being ineligible for a bursary should not make a trainee ineligible for an ITE place.** There is no requirement for training providers to decline applications solely because the trainee is ineligible for a bursary. Training providers continue to control the selection and recruitment of ITE trainees and this process of selection and recruitment remains independent of bursary eligibility.
14. Trainees who are not able to convince the training provider that they have the necessary underpinning knowledge to teach mathematics across the full range may be considered to attend a subject knowledge enhancement (SKE) course to help bring them up to the required standard.
15. Further details of SKE courses are set out in [Section 5](#) and in the SKE guide.

## Section 2 – Core bursary award eligibility and duration

### Eligibility

1. Bursaries are only for those trainees taking a specialist teaching qualification for either mathematics or English. Designed to equip trainees with the knowledge, pedagogy and confidence to teach English, mathematics and numeracy from basic level through to GCSE and level 3. Trainees on generic programmes may also be entitled to bursaries if they follow a specialist pathway through the optional units. The training provider will need to be confident that the combination of course content, teaching practice in the subject specialism, and existing qualifications, will equip the trainee to teach English or mathematics from a basic level through to GCSE and level 3. It is the training provider's responsibility to decide which trainees will benefit from additional specialist training and teaching practice and to what extent.
2. The bursary level and award is dependent on the subject area in which the trainee wishes to teach. The subject of the trainee's academic qualification is also an important consideration in determining eligibility for the English and mathematics bursary. It will be for training providers to make judgements about this, using the following guidelines.

### Mathematics

3. To teach mathematics, trainees should ideally have a mathematics degree; or a joint degree with mathematics; or a degree like physics or engineering, where the mathematics element is significant. Other degrees can be considered, subject to the training provider's judgement that the applicant has the necessary underpinning knowledge, skills and capacity to teach mathematics to trainees from basic to GCSE and up to level 3.

### English

4. To teach English, trainees should have an English degree, or another degree with a significant English or linguistics component. Other degrees can be considered subject to the training provider's judgement that the applicant has the necessary underpinning knowledge, skills and capacity to teach English to trainees from basic to GCSE level and up to level 3.

## Duration

5. The bursary award is fixed for the duration of the trainee's ITE programme and will not vary according to the length or mode of the programme.
6. Bursaries are not only financial incentives to encourage high-quality graduates into ITE, but are intended to encourage successful completion of the programme. Bursary payment arrangements are provided in [Section 6](#) of this guide.

## Eligible ITE subjects and bursary rates

7. Mathematics ITE will attract a bursary of £25,000 if the trainee has a lower 2nd class degree or above (or equivalent). English ITE will attract a bursary of £15,000 if the trainee has an upper 2nd class degree or above (or equivalent).
8. Doctorates and master's degrees will attract the same bursary award as those with a qualifying undergraduate degree, see [Annex A](#) for further information.
9. These bursaries are relevant to the academic year 2018/19 only and do not provide assurances about any future bursary rates. We advise against training providers giving any assurance to potential trainees on future bursary rates until these are released by the department.

## Section 3 – Eligibility criteria for receiving the bursary

1. For a trainee to be eligible to receive a bursary **the training provider must ensure** that, from the first day of training, the trainee meets the criteria set out below:
  1. Be an 'eligible' trainee for the provision of Student Finance England (SFE) support.
  2. Must be training through an eligible specialist programme – English or mathematics.
  3. Hold a UK first degree with at least a lower 2<sup>nd</sup> class honours or equivalent for mathematics, or at least upper 2<sup>nd</sup> class honours or equivalent for English.
  4. Not already hold QTS/QTLS or be eligible to receive QTS/QTLS.
  5. Not be undertaking paid teaching work when receiving the bursary, subject to the exception set out in criterion 5 below.
  6. Be taking a qualifying specialist ITE course at level 5 or above.
  7. Not already hold a full level 5 teaching qualification.
  8. Not be taking any other ITE course.
  9. Be notified by their training provider in writing that they are eligible.
  10. Comply with the terms and conditions of the bursary scheme.
  11. Where relevant, have undertaken a mathematics SKE course within the agreed timescale. For trainees undertaking a mathematics SKE alongside the ITE course, training providers should first check the eligibility in the SKE guidance.

### **Criterion 1: The trainee must be an 'eligible' trainee for the provision of Student Finance England support**

2. To receive a training bursary, the trainee must meet one or more of the definitions for being an 'eligible' trainee to receive grants and loans towards tuition fees or living costs, as set out in the current Education (Student Support) Regulations 2011, no. 1986, part two (eligibility).
3. The only exceptions to this are for trainees who are ordinarily resident in the Channel Islands or Isle of Man. These trainees are not eligible to access SFE support, but this does not prevent them being eligible for the training bursary, so long as the trainees satisfy all other eligibility criteria.



**Criterion 2: The trainee must be training to teach through an eligible ITE specialist programme**

4. Trainees will be enrolled on a relevant ITE programme that enables them to teach in their chosen subject to GCSE and up to level 3 standard.

**Criterion 3: The trainee must hold a UK first degree or equivalent, with at least 2<sup>nd</sup> class honours depending on the trainees chosen subject**

5. Training providers should use the trainee's highest relevant academic qualification to determine eligibility for a bursary. If equivalents are being considered, training providers should be confident that a trainee's academic qualification has the same level of breadth and depth that would be expected of a UK first degree or equivalent with at least 2<sup>nd</sup> class honours depending on the trainee's chosen subject.

**Criterion 4: The trainee must not already hold QTS/QTLS, or be eligible to receive QTS/QTLS**

6. Individuals who already hold qualified teacher status (QTS) or qualified teacher learning and skills (QTLS) status on the first day of their ITE, or who become eligible for the award of either status during their ITE programme are not eligible for an ITE bursary.

**Criterion 5: The trainee must not be undertaking paid teaching work when receiving the bursary**

7. The bursary is designed to support the trainees whilst undertaking their ITE and, in particular, their unpaid teaching practice. Training providers are advised to make it clear to trainees that, with the exception set out in paragraph 8, they cannot undertake paid teaching work and receive the bursary at the same time.
8. Trainees who are funding their own training (in their own time) to achieve a full level 5 or better teaching qualification and who undertake paid teaching may be eligible to receive a bursary. This includes part-time or sessional paid employment. The training provider must be assured that any paid teaching undertaken by the trainee is carried out somewhere other than the institute the trainee is studying and will not interfere with course attendance. The trainee must meet all other eligibility conditions. **Note that the paid teaching commitment may not be used as the required teaching practice.**

**Criterion 6: The trainee must be taking a qualifying specialist ITE course at level 5 or above**

9. A qualifying course is one of the following Diplomas or an equivalent

higher education qualification:

**a. Level 5 Diploma in Education and Training including a specialist pathway (included on the [Register of Regulated Qualifications \(RRQ\)](#))**

- *Level 5 Diploma in Education and Training (including teaching English: Literacy)*
- *Level 5 Diploma in Education and Training (including teaching English: Literacy and ESOL)*
- *Level 5 Diploma in Education and Training (including teaching Mathematics: Numeracy)*
- *Level 5 Diploma in Education and Training (including teaching Disabled Learners)*

**b. Level 5 integrated specialist Diplomas (included on the RRQ):**

- *Level 5 Diploma in Education and Training (English: Literacy)*
- *Level 5 Diploma in Education and Training (English: Literacy and ESOL)*
- *Level 5 Diploma in Education and Training (Mathematics: Numeracy)*
- *Level 5 Diploma in Education and Training (Disabled Learners)*

**c. Level 5 Diploma in Education and Training (generic award) (included on the RRQ)** on the condition that the training provider is confident that the trainee has prior qualifications and exceptional experience or knowledge that a generic course can build on, to equip them to the same standards as the above. This can be achieved by using and tailoring part of the (undefined) 45 optional credits to enhance the trainee's knowledge/skills in English or mathematics; and ensuring that the teaching practice element is in the subject specialism.

**Note:** For further information on specialist qualifications, see the appropriate [guidance](#) produced by Learning and Skills Improvement Service (LSIS) in May 2013 to support HEIs and Awarding Organisations to develop their respective specialist qualifications:

- LSIS May 2013 Teaching and Training Qualifications for the Further Education and Skills Sector in England (2013) Guidance for higher education institutions.

- LSIS May 2013 Qualification Guidance for awarding organisations.
- Level 5 Diploma in Education and Training (English Literacy)/ (English: Literacy and ESOL)/ (Mathematics: Numeracy).
- Level 5 Diploma in Teaching English: Literacy/English: Literacy and ESOL/Mathematics: Numeracy.

These guidance documents specify the qualification content and teaching practice requirements.

**Criterion 7: The trainee must not be taking any other ITE course, scheme or programme**

10. To be eligible for the training bursary, trainees must not be undertaking any ITE course, training scheme or programme that is considered a teaching qualification for FE or leads to the award of QTS other than those specified in criterion 6 above.

**Criterion 8: The trainee must not already hold a level 5 teaching qualification.**

11. A trainee who already holds a recognised teaching qualification at level 5 or above, for example PGCE, DTLLS or DET is not eligible to receive an ITE bursary.

**Criterion 9: The trainee must be notified by their training provider in writing that they are eligible**

12. The training provider will determine whether a trainee is eligible to receive a bursary and whether they continue to receive it. They must inform the trainee in writing (in good time and before the start of their ITE course) that they are entitled to a bursary, at which point the trainee becomes eligible to receive an award from us.

**Criterion 10: The trainee must comply with the terms and conditions of the new bursary scheme**

13. Trainees must agree in writing, with their training provider, to comply with the terms and conditions of the bursary scheme including the two conditions below. The training provider should retain this on file for audit purposes the:
  - a. confirmation from a trainee informing their training provider of any changes in their bank and address details; and
  - b. confirmation informing their training provider of their intention to withdraw from their course.

14. Training providers must make clear in their terms and conditions the bursary implications of not completing the course. Please see [Section 6](#) on bursary payments for more detail.
15. The terms and conditions must also make clear how the training provider intends to pay the trainee. Please see [Section 6](#) for more details on payment patterns.
16. If a trainee is found to be ineligible for the bursary, the training provider must recover any payments that have been incorrectly paid to the trainee as these will be recovered by the department.

**Criterion 11: The trainee must complete a required mathematics SKE course within the agreed timescale**

17. If, as a condition of starting a mathematics ITE programme, the trainee is required to undertake a mathematics SKE course, they must complete that programme within the agreed timescale in order to continue to be entitled to a bursary.
18. It is the training provider's responsibility to assure themselves that the SKE course has been completed to their satisfaction. This must be done to confirm that the candidate has successfully completed the ITE programme. Where a trainee does not complete the SKE course, the entitlement to the bursary should cease on the basis that they have not acquired the necessary knowledge to enable them to teach.

## Section 4 – Determining eligibility

1. Training providers will need to ensure those responsible for decisions on eligibility for the bursary are familiar with, or have access to, advice on the range of qualifications generally regarded as equivalent to a first degree in the UK. This will include overseas qualifications, professional or vocational qualifications, and qualifications no longer available but held by applicants.
2. Training providers will need to be aware of the range of degrees awarded by UK institutions. It is for the training provider to decide whether an individual's highest relevant academic qualification meets the bursary eligibility criteria, and whether a particular qualification demonstrates the breadth and type of academic engagement that would be expected from undertaking a bachelor's, master's or doctoral degree.
3. Training providers that are not degree awarding bodies, or are unfamiliar with assessing the validity of academic qualifications, may wish to familiarise themselves with the [Framework for Higher Education Qualifications in England, Wales and Northern Ireland \(FHEQ\) by the QAA](#).
4. Further guidance about how to assess the equivalency of UK qualifications is provided at [Annex A](#).

## Section 5 – Subject knowledge enhancement (SKE) courses for mathematics

1. SKE courses are pre-ITE programmes designed to boost specific subject knowledge for those trainees that with added support have the potential to become outstanding mathematic teachers. These arrangements apply to mathematics only for pre-service postgraduate programmes that enables trainees to teach mathematics to GCSE and level 3. Full details are set out in the [SKE guide](#). Training providers must direct any queries about the possible use of SKE to the department through: [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk).

## Section 6 – Bursary payments

1. This section covers bursary payments for FE ITE programmes. Separate arrangements are available to pay bursaries for trainees who need to complete a mathematics subject knowledge enhancement (SKE) scheme. Trainees cannot get an SKE bursary at the same time as an ITE bursary. Full details are in the [SKE guide](#).
2. Training providers will receive monthly payments sufficient to cover the instalments for each eligible trainee they have reported. Bursary awards should be paid in equal monthly instalments over the duration of the course. The standard payment months for full-time courses are **October to July** of the academic year.
3. The bursary awards are not taxable; however, they may be treated as capital for the purposes of assessing income for trainees in receipt of means-tested state benefits. Training providers are strongly advised to direct trainees towards their local benefits office to check whether this may affect their state benefits.

### Bursary awards

4. Table 1 sets out the pattern of payments for trainees on full-time courses.

**Table 1: Bursary payment schedules for trainees studying full-time**

Bursary award	Payment schedule
£15,000 for English	10 equal monthly instalments of £1,200, from October to July with enhanced payments of £1,500 in February and £1,500 in July or the final month in which the trainee completes the course.
£25,000 for mathematics	10 equal monthly instalments of £2,000 from October to July with enhanced payments of £2,500 in February and £2,500 in July or the final month in which the trainee completes the course.

5. Trainees studying on part-time or modular courses who are in receipt of a bursary will receive the bursary award in instalments, and will be subject to weighting depending on attendance and completion of the course as with full-time trainees.
6. The trainee will receive the enhanced payments at the end of the first half of their programme and upon completion. The trainee will have to satisfy two conditions in order to receive these enhanced payments. These are:

- that the trainee is present on the programme at the end of the first half of their programme; and
- that the trainee completes their ITE programme.

7. Table 2 sets out the payment patterns for awards over £15,000 for trainees on part-time and modular courses.

**Table 2: Bursary payment schedules for awards at £15,000 and above to trainees studying on part-time or modular courses**

Bursary award	Payment schedule
£15,000 for English	Flexible payment pattern of instalments, the total of which should not exceed £12,000, with two enhanced payments of £1,500 at the end of the first half of the programme, and upon completion of the programme.
£25,000 for mathematics	Flexible payment pattern of instalment, the total of which should not exceed £20,000 with two enhanced payments of £2,500 the first at the end of the second half of the programme, and upon completion of the programme.

## Trainee withdrawals

8. Eligible trainees who withdraw from their course or specialist modules 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.
9. In the event of withdrawal, the training provider must suspend all bursary payments to the trainee immediately and ensure that their records are updated to reflect the withdrawal. The department will not reimburse training providers who have paid the training bursary in error to trainees who have already withdrawn. The department expects training providers to recover any overpayment of the bursary from trainees. Training providers should not make any pro rata training bursary payments to trainees.
10. Training providers **must** inform the department at [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk) immediately when a trainee withdraws from an ITE programme, or from continuing with the specialism agreed with the training provider at the start of the course.



11. For enhanced payments, a trainee who starts in September 2018 but withdraws after 1 January 2019 will not receive their enhanced payment in February.

## Returning trainees

12. 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, training providers should contact [ITT.Funding@education.gov.uk](mailto:ITT.Funding@education.gov.uk).
13. If a trainee leaves their ITE course, which started after 1 August 2018, and joins a new one, they may carry with them advanced standing or credit. If this is the case then the trainee will only be eligible for a training bursary up to the value agreed at the start of their course.
14. 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.
15. If a trainee does not take any advanced standing or credit from the previous ITE course, and is being charged a new tuition fee, this is viewed as a separate qualification. Trainees who have already received a full bursary award on a previous qualification will not be eligible for another bursary.

## Repayment

16. In selecting candidates, training providers should consider that after completion of their course trainees are expected to enter a teaching post in the FE sector in England. However, bursary payments will only be recovered if they have been paid in error.

## Suspended trainees

17. Trainees who are suspended from their course pending investigation may continue to receive their bursary payments. If a decision is reached to terminate the trainees programme payments will be stopped immediately. Any payments made in error by the training provider should be recovered from the trainee.

## Section 7: Monitoring and assurance

1. Training providers must hold full records of all trainees in receipt of bursaries, including details of the trainees' academic qualifications achieved prior to starting their ITE. Trainees must be in receipt of the degree on which they are assessed **prior to starting the course**. The department reserve the right to request these details at any point during the academic year from training providers, for the purpose of monitoring quality.
2. The department will seek rigorous assurance about the bursaries allocated to eligible trainees from the trainee information record, which will need to be verified by an institution's Responsible Officer as being a true and accurate record. Trainee information must be provided on the application form which can be downloaded from [GOV.UK](https://www.gov.uk). Training providers must use this as the basis for creating a composite record for all trainees. This should be kept up-to-date as new trainees are recruited, and submitted to department at [ITT.Funding@education.gov.uk](mailto:ITT.Funding@education.gov.uk) as a claim for bursary funds. **Note:** this address should only be used for trainee records. Enquiries that trainees have about bursaries should be directed to either the training provider (if already accepted/enrolled on a course) or the FE Advice helpline on 0300 303 1877 (if a general enquiry about ITE and bursaries). The frequently asked questions section at the end of this guidance may also be of assistance.
3. Training providers are reminded that funds for bursaries are limited, so records and any updates need to be submitted promptly to the department so that funds can be released. Records received after the 15<sup>th</sup> of each month may be carried forward to the following month. Funding adjustments will be made to bursary payments for that month in these cases.
4. Training providers are reminded of the need to ensure that all trainee records are accurate and complete. Where there is a lack of accurate or complete data, this will result in training provider payments being delayed until the data is corrected and re-submitted.
5. The department will carry out a reconciliation exercise between the bursary payments and the actual trainee records. In the event of any variances, particularly with regard to unclassified degrees, the department reserves the right to contact training providers to request explanations of the variances and to seek further information.

# Annex A – Assessing UK academic qualifications

## Honours and ordinary bachelor's degrees

1. The [Framework for Higher Education Qualifications in England, Wales and Northern Ireland \(FHEQ\)](#) sets out that someone who holds a bachelor's degree with honours will have:

“developed an understanding of a complex body of knowledge, some of it at the current boundaries of an academic discipline”.

In addition, holders of this award:

“will be able to evaluate evidence, arguments and assumptions, to reach sound judgements and to communicate them effectively”.

2. Honours degree holders will usually have completed an independent dissertation or thesis relating to the subject in which they are specialising and will have undertaken considerably fewer contact hours than an ordinary degree. The length of study for a full-time bachelor's degree with honours usually equates to three years – longer for the part-time equivalent. Honours degrees require 360 credits for completion.
3. Ordinary bachelor's degrees are largely a taught degree programme with less specialisation or independent study involved, and the outcome can sometimes be a licence to train in a particular area, such as accounting. A trainee may sometimes be transferred from an honours programme onto an ordinary degree programme if they have not achieved the required grades throughout the programme to graduate with honours.
4. Open degrees from the Open University, awarded without honours, are ordinary degrees and they are not eligible for bursaries in their own right. Trainees may be able to study a further 60 credit module to convert these degrees to honours, but this may not necessarily uplift the trainee's final classification to at least upper 2<sup>nd</sup>, which is normally necessary for bursary eligibility. Trainees in this position are advised to contact the Open University for advice.

## Medical first degrees

5. First degrees in medicine that are qualifying awards in professional terms are not classified. Although usually entitled 'Bachelor', they are at level 7 (master's level) on the Frameworks for Higher Education Qualifications (FHEQ). However, this will apply only to degrees that are five years in length.

6. Training providers may consider five-year degrees in medicine, dentistry, veterinary science and surgery as equivalent to an upper 2<sup>nd</sup> degree for the award of a bursary. A first or distinction in an integrated master's medical degree can be considered equivalent of a 1<sup>st</sup> class degree for the purpose of awarding a bursary.
7. There are also medical bachelor's degrees, which may be awarded as exit awards to trainees who satisfy the criteria specified but fail to meet the criteria for progression to the fourth or fifth year of the qualifying medical degree. These qualifications are often called Bachelor's of Medical Science (B Med Sci). Training providers can consider these degrees equivalent to a lower 2<sup>nd</sup> degree for the purpose of awarding a bursary.
8. There are a range of medical bachelor's degrees, which may be awarded as exit awards to trainees who do not progress to the fourth or fifth year of the qualifying medical degree. As the titles of these awards are not consistent and a number of award titles may be used for both successful completion and exit by different institutions, we advise training providers to check individual cases with the relevant awarding institution before making a decision about awarding bursaries.

## List of eligible academic qualifications

9. For the purpose of determining the bursary eligibility training providers should consider take the trainee's highest academic qualification.
10. Aegrotats are degrees awarded if a candidate was unable to sit their final exams due to illness. Training providers cannot consider these aegrotat, non-honours or ordinary degrees as suitable equivalency for a bursary award.
11. Trainees who do not hold a first degree or equivalent at 2<sup>nd</sup> class honours or above will not be eligible for a bursary in principle, unless they have an eligible relevant higher academic qualification, such as a doctorate or master's degree.
12. Training providers cannot consider a postgraduate certificate (PGCert) or diploma (PGDip) as suitable equivalency for a bursary award.

## Doctoral and master's qualifications

13. Doctoral and master's level qualifications may include other UK qualifications deemed by the training provider to have the same level of academic breadth and depth.
14. If a training provider uses a higher academic award, i.e. doctoral or master's, to award a bursary to a trainee, they must seek confirmation that the qualification was completed before the start of the ITE course. If the outcome is not yet known, the bursary award must be made based on the highest relevant academic award

on the date training course started. Please contact [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk) for further guidance in these circumstances.

## Master's degrees

15. The [Framework for Higher Education Qualifications in England, Wales and Northern Ireland \(FHEQ\)](#) describes master's degrees as separate from other postgraduate qualifications in their "increased intensity, complexity and density of study". Master's degrees are awarded after the completion of taught courses, programmes of research or a mixture of both, and the FHEQ's descriptor for master's degrees states that they "typically include planned intellectual progression that often includes a synoptic/research or scholarly activity". The level of study associated with a master's degree should typically equate to one calendar year full-time.
16. These do not include the Master of Arts (MA) degrees that are granted, on application, by the Universities of Oxford and Cambridge to graduates of these universities with a Bachelor of Arts (BA) degree. Master's degrees that are offered as part of a trainee's route to QTS will not count for the purposes of assessing eligibility.

## Integrated Master's degrees

17. Integrated master's degrees are undergraduate programmes extended by one year to allow trainees to reach master's level. The academic level of work in the fourth year is at master's rather than at bachelor's level.
18. These programmes are normally found in science and engineering academic disciplines, and the usual degree awarded is MEng or a named integrated master's degree such as MPhys (Master of Physics) or MChem (Master of Chemistry). Completed integrated master's degrees are equivalent to Level 7 (master's degree) on the FHEQ.
19. Trainees who took an integrated master's but do not have a degree classification or pass/merit distinction can be considered for a bursary, but the training provider will be required to demonstrate that the trainee is of high quality. Trainees who did not complete the final year can be awarded a bursary based on their final degree classification on exit and the subject in which they train to teach.

## Doctoral degrees

20. The FHEQ's descriptor of doctoral degrees sets out that they are awarded for the "creation and interpretation, construction and/or exposition of knowledge which

extends the forefront of a discipline, usually through original research". Professional doctoral programmes that may include a research component, but which have a substantial taught element, usually lead to awards that include the name of the discipline in their title (e.g. EdD, DClinPsy or DBA). The titles PhD and DPhil are commonly used for doctoral degrees awarded on the basis of original research. The level of study associated with a doctoral degree should typically equate to three calendar years full-time for a research-based doctoral degree, although it may take up to five years of full-time study for a professional doctoral degree. Honorary doctorates are not eligible academic qualifications and are not accepted by QAA as academic qualifications.

## Annex B – Assessing overseas qualifications

### Overseas degree equivalency table

1. When selecting trainees with overseas degrees training providers should ensure that they comply with the ITE criteria. A ‘Statement of Comparability’ can be obtained from the National Recognition Information Centre for the United Kingdom (UK NARIC) which confirms whether or not the trainee’s degree is comparable to UK British bachelor’s, master’s or doctorate level. The ‘Statement of Comparability’ cannot be used to establish the classification of the trainee’s degree; this has to be done either by using the [overseas degree equivalency table](#) produced by UK NARIC, or by making a professional assessment.
2. UK NARIC has produced an overseas degree equivalency table to support training providers in determining the appropriate level of bursary award. UK NARIC’s study looked at all overseas qualifications comparable to British Bachelor (honours) and British Bachelor degree standard, and their equivalence to 1st class, upper 2nd or lower 2nd honours degrees. A summary of the methodology used to produce the table is available on the [NARIC website](#).
3. UK NARIC produced the first version of the overseas degree equivalency table in 2011, which analysed qualifications from 160 countries. Given recent changes to education systems, particularly in Europe, the department commissioned UK NARIC to update the equivalency information for 41 countries. The updated overseas degree equivalency table was published in May 2015. The equivalency information for the 41 updated countries can be accessed using the ‘Countries A-Z’ tabs. The information for all other countries, which was produced in 2011, can be found on the ‘Country not listed’ sheet.
4. The overseas degree equivalency table is intended as an advisory guide for training providers, and training providers should use their professional judgement in determining eligibility. UK NARIC does not recommend applying the methodology or table in other contexts.

### Qualifications not included in the equivalency table

5. It is important to note that many overseas qualifications sit either above or below British bachelor’s (honours) and British bachelor’s degree standard. They will therefore will not be included in the data in the overseas degree equivalency table as they were outside of the scope of UK NARIC’s study. Training providers may wish to seek a Statement of Comparability from NARIC to verify the actual degree itself before making any judgements about bursary eligibility.

6. Overseas qualifications not equivalent to at least 2<sup>nd</sup> class honours as supported by the overseas degree equivalency table are deemed equivalent to Ordinary or 3<sup>rd</sup> class degrees. If a training provider can make an assessment that the individual's degree is equivalent to at least 2<sup>nd</sup> class honours, based on the evidence available to them, they can apply for a bursary on the trainee's behalf. They may be asked to provide evidence to support their judgement in these circumstances.

## Grading not included in the equivalency table

7. There may be circumstances in which the trainee's first degree can be compared to British bachelor's (honours) and British bachelor's degree standard but there is no actual grading of the degree available. In this case training providers may award a bursary providing they are satisfied that the trainee's degree is of the same depth and breadth as the bursary award would indicate. Training providers are advised to seek a transcript of the trainee's degree or further evidence of the trainee's achievement.
8. Please contact the department at [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk) if the data in the overseas degree equivalency table suggests that a grading should be available for the trainee's degree, but the trainee was not issued with a final grade.

## Countries not included in the equivalency table

9. Where the overseas degree equivalency table does not include the country from where the trainee holds their degree, or the data refers to a 'case-by-case' assessment, training providers should contact the department at [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk). Training providers are reminded that they must hold full and transparent audit trails relating to bursary payments made to trainees with overseas degrees that are not identified in the overseas degree equivalency table.

## Overseas master's and doctoral degrees

10. Trainees who hold overseas master's and doctoral degrees may be assessed for eligibility independently of the overseas degree equivalency table. Training providers should obtain a Statement of Comparability from NARIC if necessary.
11. Where a trainee's degree can be compared to UK master's or doctoral level, these degrees should be treated as equivalent, and the appropriate bursary award should be awarded for that ITE subject as indicated in [Table 1](#).
12. Training providers should use their professional judgement in determining any bursary awards for overseas master's or doctoral degrees that are not equivalent to a UK master's or doctoral degree. They must be prepared to build a strong case for awarding a higher bursary award than their qualification would suggest.



13. In exceptional cases, trainees who hold overseas bachelor's, master's or doctoral degrees that sit below British bachelor's honours degree standard may be awarded a bursary if the training provider is able to provide a strong case for eligibility backed up by a full audit trail of the information considered in reaching this judgement.

## Annex C – Frequently asked questions

### **Q1. How will trainees find out about this scheme, what should training providers do if trainees want further information?**

The department expects and encourages training providers to promote the bursary to eligible trainees on relevant programmes and prospective trainees considering relevant programmes. New trainees who have not made any arrangements with a specific training provider and want more information should contact [FE Advice](#) on 0300 303 1877.

Trainees who already have places agreed with training providers should consult their training provider about any entitlement to a bursary.

All trainees seeking information on any aspect of trainees financial matters **must** contact the SFE via [this page](#).

### **Q2. Why is the English bursary criteria restricted to upper 2nd when schools are giving bursaries to trainees with a lower 2nd?**

Bursaries for FE teacher training have always been matched to those provided for schools wherever possible. We need to manage within the available budget for FE initial teacher training bursaries, which means that we need to strike a balance between the numbers who can be supported across both English and mathematics. In order to maintain this balance we have decided increase the English bursary to £15,000 from £9,000 in line with the increase for schools teacher training but not to extend it to those with a lower 2nd training to teach English. Those trainees, whilst not being eligible for a bursary, will still be able to access funding through SFE in the usual way.

### **Q3. Why is the mathematics overall FE bursary less than the schools bursary and without the additional early career payments?**

We have decided that the FE mathematics bursary will remain at £25,000 for academic year 2018/19, while the department is trialling a new model for school's teacher training that will pay a £20,000 training bursary then make two separate early career payments of £5,000 in years 3 and 5 of employment. We feel it would be more appropriate to await the outcomes of the trial before making any changes to FE bursaries.

**Q4. For graduates to be eligible for a bursary to teach mathematics, does their degree have to be simply in mathematics, or is another related subject acceptable?**

No, however we would ideally like a trainee to have a degree in mathematics, or a joint degree with mathematics, or a degree such as physics or engineering, where the mathematics element is significant. However, other degrees can be considered, **subject to the training provider's judgement** that the applicant has the necessary underpinning knowledge, skills and capacity to teach mathematics to trainees from basic to GCSE and level 3.

**Q5. For graduates to be eligible for a bursary to teach English does their degree have to be English, or will another subject be acceptable?**

No, however we would ideally like a trainee to have a degree in English or a similar degree with a significant English component. However, other degrees will be considered **subject to the training provider's judgement** that the applicant has the necessary underpinning knowledge, skills and capacity to teach English to trainees from basic to GCSE and up to level 3.

**Q6. Will the bursary have an impact on any state benefits that a trainee receives?**

Potentially. Although bursaries are non-taxable they can be counted as capital and as such may have an impact on means-tested state benefits. Trainees are strongly advised to contact the Department for Work and Pensions or their local Jobcentre to find out if the bursary will affect their state benefits.

**Q7. Does the English bursary include those proposing to teach ESOL?**

No, the bursary is to support those intending to teach English from basic to GCSE and up to level 3. However, if a trainee intends to teach English and follows a combined specialist ITE programme in English: literacy and ESOL, this will be in scope of the bursary.

**Q8. I have a part-time paid teaching post; will I be eligible to apply for a bursary?**

You may be eligible. Trainees who are funding their own training (in their own time) to achieve a full level 5 or above teaching qualification and who undertake paid teaching may be able to receive a bursary. This is the case if you are employed in a school or institution other than the one at which you are being trained. You must meet all of the other eligibility conditions. Your training provider must be assured that the paid teaching commitment will not interfere with your attendance at the ITE course and the carrying out of the required teaching practice. **Note the paid teaching commitment may not be used as the required teaching practice.**

**Q9. Will bursaries be available to those who previously worked in the sector, but want to return to teach mathematics or English?**

Yes. If a trainee left the sector and wants to return, and doesn't already hold a Diploma in Education and Training or equivalent, or QTS/QTLS, they may be eligible for a bursary so long as they meet all other criteria.

**Q10. Will the bursary be available to those who wish to study on a part-time basis?**

Yes, but only for those studying pre-service for a specialist Diploma in Education and Training or equivalent. This will **not** apply to those studying in-service, that is those who are already employed as a teacher in the sector and are completing their ITE programme as part of that employment.

**Q11. How do training providers apply for a bursary on behalf of the trainee?**

Full details are provided in [section 6](#) of this document.

**Q12. When should training providers submit an application?**

Applications must be submitted within 6 weeks of the trainee starting their ITE programme. Eligible applications will be processed as quickly as possible and payments will commence in good time on receipt of all relevant information. Failure to complete the application form correctly may delay payment.

**Q13. Will a trainee be entitled to arrears if they decide to switch and study a specialism half way through their course?**

No. Bursary payments will be started from the point that a trainee switches and will continue until the end of the course. Arrears will not be calculated.

**Q14. Is there an appeals process for a trainee refused a bursary?**

Yes. If a trainee is unhappy with the decision and it relates to acceptance on a course, they should approach their training provider and use their appeals procedure. If the complaint is about the policy or availability of bursary funds, they should contact the department at [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk).

**Q15. Who is the bursary paid to – the trainee or the training provider?**

The bursary will be paid to the training provider who will pay the trainee on a monthly basis.

**Q16. Is there any funding to support training providers' administration of the bursaries?**

No. Bursaries are provided to enable training providers to attract good candidates to teach mathematics and English, and enable them to complete the course. As the training provider is recruiting and training the individuals we ask them as part of the

process to passport the bursary payments to them as they already have a relationship with them.

**Q17. Will trainees be able to apply for trainee support loans?**

Yes. Being eligible for trainee support is a pre-cursor for receiving a bursary. The training provider must be approved by, and meet the current requirements of SFE.

**Q18. Will trainees have to repay their bursary if they do not secure a job teaching in their specialism?**

No. The bursaries are provided to attract people into FE mathematics and English teacher education, and to support them during their training. We do not ask for repayment if a teacher cannot secure a job teaching their specialism once they are qualified.

**Q19. Are the bursaries for those intending to take specialist English or mathematics teaching qualifications, or generic teaching qualifications?**

The bursaries are aimed at trainees undertaking training with a specialism in either English or mathematics who intend to teach in these areas. Trainees on generic programmes may be entitled to bursaries if they follow specialist pathways through the optional units and a combination of course content and existing qualifications equips them to teach English or mathematics from basic to GCSE and up to level 3. It will be for training providers to make judgements about this, and the extent to which particular trainees may require additional specialist training. Mathematics courses must cover the full specialisms and offer work experience in an appropriate environment as set out in the Register of Regulated Qualifications.

**Q20. Is a trainee on the 120 credit, level 5 Diploma in Education and Training not eligible for a bursary?**

Not necessarily. The two main courses that attract bursaries are the level 5 DET, including a specialist pathway, (120 credits) and the level 5 integrated specialist diploma (120 credits). Both of these cover the training for teachers in English or mathematics to the standard/level we are expecting. Trainees will be eligible for a bursary if they are studying a generic diploma on the condition the training provider is confident the trainee has prior qualifications and/or exceptional experience or knowledge that a generic course can build on to equip them to the same standards. This could be done by using and tailoring part of the (undefined) 45 optional credits to enhance the trainee's knowledge/skills in English or mathematics or using the teaching practice element for the subject specialism. If that is not the case, the trainee should consider the DET with specialist pathway, or the integrated specialist DET, if they wish to receive a bursary.

**Q21. Will there be a bursary to support teachers who already have a full ITE qualification and wish to undertake the 45 credit stand-alone subject specialist English and mathematics qualification?**

No. The bursary is only available for the full 120-credit generic and integrated specialist ITE qualification. There are various CPD courses available for existing mathematics and English teachers to enable them to teach to the GCSE and Level 3 standards.

**Q22. When can trainees enrol on courses that attract bursaries?**

Training providers publish their own prospectuses showing course enrolment dates and determine enrolment arrangements. Trainees should decide which of these best suits their needs.

**Q23. How long is the bursary paid for?**

The duration of the trainee's programme.

**Q24. Is there deadline to receive bursary applications?**

No, funding is however limited and available for one academic year only. There is likely to be high demand at the start of the academic year and training providers need to make an application within six weeks of the trainee starting their course.

**Q25. Where can I find out more details about mathematics SKE?**

A separate guide has been produced on the SKE scheme. This provides all the information for both training providers and trainees on both the courses and separate bursaries. The [SKE guide](#) is available here.

## Further qualification questions

### Non-honours UK degrees

**Q26. I have an ordinary degree but I trained to be a doctor. Will I be eligible?**

Yes. The bachelor's of medicine, dentistry, veterinary science and surgery may all be eligible for the bursary at upper 2<sup>nd</sup> level providing that the trainee completed the whole degree. Exit qualifications, which are qualifications that are awarded to recognise what an individual has achieved at the point where they leave a programme before completing it in full, can be awarded after three years of a medical degree. Such qualifications can be considered for an application for a bursary. The names of these degrees will vary, trainees will be expected to provide a transcript of their final degree and score, and their training provider may wish to contact the original awarding institution for clarification of any issues arising. If a provider has any questions about an ordinary medical degree which they have not been able to clarify by following this process they should contact [FE.workforceincentives@education.gov.uk](mailto:FE.workforceincentives@education.gov.uk).

**Q27. My applicant does not hold a degree of a UK university, but does have two accountancy qualifications and a one-year Chartered Association of Certified Accountants certificate. Would they be eligible for the bursary?**

If a trainee holds professional/vocational qualifications such as these, the training provider will need to examine, and demonstrate that they have examined the qualification, in more detail and be confident that it covers that same academic breadth and depth of a first undergraduate degree at honours level. It is advisable to keep transparent audit trails relating to any decisions that training providers have made in relation to such qualifications.

You may wish to consult the [QAA website](#) to find out at which level they think it would sit on the Framework of Higher Education Qualifications. It will need to sit at Level 6, and would need to be deemed equivalent to a lower 2<sup>nd</sup> class honours and 360 credits for mathematics and an upper 2<sup>nd</sup> class honours for English to be considered for bursary eligibility.

**Q28. I did an Open University degree worth 300 credits. Can this be considered for bursary eligibility?**

No, The Open University's Open degree can be awarded with or without honours. Those without honours consist of 300 credits and would therefore not be eligible for bursaries in their own right. Those that consist of 360 credits are honours degrees, and will be eligible for the bursary providing that the trainee meets the eligibility requirements.

Trainees with Open degrees of 300 credits may be able to study a further 60 credit module with the Open University to convert the degree to honours. This may not however, uplift the trainee's final classification to at least lower 2<sup>nd</sup> class degree for mathematics and an upper 2<sup>nd</sup> class honours degree for English which is necessary for bursary eligibility. Trainees in this position are advised to contact the Open University for advice.

**Q29. Will trainees who hold postgraduate qualifications, ie doctoral and master's qualifications, qualify?**

Yes, provided the qualification is one that fully meets the requirements and all other eligibility criteria are met.

**Q30. Can trainees with 3<sup>rd</sup> class degrees still get bursaries if they have a master's or PhD?**

Yes, the scheme looks at a trainee's highest relevant academic qualification when assessing eligibility for bursaries.

**Q31. Can trainees with 3<sup>rd</sup> class degrees and extensive professional experience still get a bursary?**

No, as the minimum requirement for a bursary is an upper 2<sup>nd</sup> class honours degree and above to train to teach English and a lower 2<sup>nd</sup> class honours degree for mathematics. They may still however, be eligible for the package of grants, fee loans and maintenance loans available from the SFE.

**Q32. What if a trainee has two first undergraduate degrees and one is a 3<sup>rd</sup> class degree?**

The degree with the highest outcome should be used for assessing bursary eligibility.

## **Eligibility for trainees from overseas**

**Q33. Is a bursary available to trainees from overseas?**

Yes, providing they meet all eligibility criteria.





Department  
for Education

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