



## Guidance

# Initial teacher training bursaries funding manual: 2019 to 2020 academic year

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## What is a training bursary

A training bursary is a financial incentive to attract high quality graduates into the teaching profession. The bursary amount varies according to the subject in which they wish to train to teach.

[Training bursary award and eligibility](#) includes:

- an overview of the financial incentives
- eligibility criteria for trainees

Training bursaries are awarded to trainees based on the classification of their first degree, but are also available to trainees who hold other relevant academic qualifications, such as:

- master's
- doctoral degrees
- medical degrees
- overseas degrees

Further information about training bursaries is provided in:

- [Annex B: assessing UK academic qualifications](#)
- [Annex C: accessing overseas qualifications](#)

## Scholarships

We work with subject associations to provide a limited number of scholarships worth up to:

- £28,000 for trainees on physics, computing, chemistry, geography and languages courses
- £22,000 in secondary mathematics ITT courses

More information about these scholarships is available on the [Get into Teaching](#) website.

## Subject knowledge enhancement (SKE) bursaries

Information about SKE funding can be found in [Funding: initial teacher training \(ITT\), academic year 2019 to 2020](#).

## Training bursary award and eligibility

[Eligible ITT subjects](#) set out the training bursary rates for courses starting in the 2019 to 2020 academic year.

Training bursary awards are fixed for the duration of the trainee's ITT programme and is not affected by the length of training.

We'll publish further information regarding future training bursaries at the appropriate time.

You must not make assumptions about the value or scope of training bursary awards in future years based on the information provided in this document.

## Eligibility

The training bursary level awarded is dependent on the:

- subject a trainee wishes to teach
- grade of their highest academic qualification – not the subject of their academic qualification

### Example

A trainee with a first class degree in English will be eligible for a £26,000

training bursary if they're training to teach physics, and £15,000 if training to teach English.

This does not change your selection or recruitment process, including making judgements about the relevance of the degree to the subject of training.

## Eligible ITT subjects

Qualifications and awards:

- [scholarship](#)
- tier 1: first class or doctoral degree
- tier 2: 2:1 or master's degree
- tier 3: 2:2
- tier 4: other degree award

Trainees cannot receive both the scholarship and training bursary.

Bursaries are available to trainees who hold tier 1 to 3 qualifications. There is no scholarship or bursary available for those with tier 4 qualifications.

Scholarships and training bursaries are available in the below subjects.

Subject	Scholarship	Bursary
Physics	£28,000	£26,000
Secondary mathematics	£22,000	£20,000
Computing	£28,000	£26,000
Languages	£28,000	£26,000
Geography	£28,000	£26,000
Chemistry	£28,000	£26,000

Bursaries are also available in the below subjects.

Subject	Bursary
Classics	£26,000
Biology	£26,000
Design and technology	£12,000

English	£15,000
History	£12,000
RE	£9,000
Music	£9,000
Primary with mathematics	£6,000

Applicants with a degree from outside the UK should:

- refer to [Overseas degree equivalency: table and methodology](#) to see if their degree is likely to attract a bursary
- speak to their chosen training provider

Engineering and food technology trainees receive a bursary under the design and technology heading.

## Primary with mathematics

The Primary with mathematics bursary is available only to trainees who hold:

- a degree classification of 2:2 or above
- at least a grade B in mathematics A level or equivalent

Trainees who do not meet this requirement will not attract a bursary.

It's your responsibility to determine A level equivalency. We will not determine equivalency in individual cases.

## Undergraduate bursary

A training bursary for final year undergraduates of £9,000 is available for trainees on courses in secondary mathematics and physics that lead to qualified teacher status (QTS).

The bursary is:

- available to undergraduate trainees who enrol on a QTS course beginning in the 2019 to 2020 academic year
- is payable in the final year of their course

The same £9,000 training bursary is available to trainees on an opt-in secondary undergraduate mathematics, physics, computing or languages course that leads to QTS.

Trainees who are on an undergraduate course, that leads to the award of QTS and also leads to the award of a Master's degree, receive a £9,000 bursary in both the penultimate and final years of their course. This means the trainee will have received a total of £18,000 by the point of completion.

## Secondary mathematics early-career payments

Secondary mathematics trainees who start an eligible postgraduate ITT programme in academic year 2019 to 2020 will receive two additional early-career payments of £5,000 each (£7,500 if teaching in specified areas of England) in their third and fifth year of teaching, if they have taught in a state-funded school in England since completing their teacher training course. These amounts are after tax, so teachers will receive the full amount as stated.

For more information please refer to the [mathematics early-career payments guidance](#).

## Troops to Teachers undergraduate bursary

A training bursary worth £40,000 is available for undergraduate veterans who have left full time employment from the:

- British Army
- Royal Air Force
- Royal Navy

They must have left no more than 5 years before the start of their course.

The bursary will be provided in equal monthly instalments in each of the final two years of the course, with £20,000 payable in each year. The ITT provider should confirm the actual payment schedule with the trainee.

The bursary is available to undergraduate trainees who enrol on an eligible ITT course that leads to QTS in secondary biology, physics, chemistry, computing, mathematics or languages, beginning in the 2019 to 2020 academic year.

A full breakdown of eligible subjects can be found in [Annex A: list of subjects eligible for a bursary](#). No other ITT courses will attract a training bursary, regardless of a trainee's degree class. Details of which academic qualifications are linked to the relevant training bursary levels are given in [Annex B: assessing UK academic qualifications](#).

# Eligibility for training bursaries

For a trainee to be eligible to receive a bursary, you must make sure that, from the first day of training, the trainee meets and continues to meet the criteria set out below.

To be eligible, a trainee must:

- be eligible to receive student support
- hold a UK first degree or equivalent
- be taking a qualifying postgraduate or undergraduate ITT course in England
- be notified in writing by their ITT provider of their eligibility for the course
- comply with the terms and conditions of the bursary scheme
- not be in possession of, or eligible for QTS
- not be undertaking paid teaching work when in receipt of the bursary
- not be simultaneously undertaking any other ITT course, training scheme or programme that leads to QTS

The points above should be read in conjunction with the corresponding paragraphs below which give further guidance.

## Eligibility for UK student support

To receive a training bursary the trainee must meet one or more of the definitions for being an 'eligible' student to receive grants and loans towards tuition fees or living costs as set out in the [Education \(Student Support\) Regulations 2011](#), part two (eligibility), no. 1986.

This includes meeting the requirement to be 'Home or EU status' for the purpose of assessment of fees. For further information on this requirement you should contact [Student Loans Company](#).

Trainees from the Isle of Man, Jersey and Guernsey may not meet one of the definitions above. However, they may still be eligible for support from their respective home education departments and, where this is the case, they will still be eligible for a training bursary on the basis that they meet all other criteria.

International students can contact the [UK Council for International Student Affairs \(UKCISA\)](#) for advice on student support and other issues around studying in the UK.

## UK first degree

You should use the trainee's highest academic qualification which aligns with the appropriate training bursary tier to determine eligibility for a training bursary. You 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 with at least second class honours.

This criteria does not apply for undergraduate bursaries.

## Qualifying ITT course in England

To be eligible to receive a bursary, the trainee must be recruited to a qualifying postgraduate or undergraduate ITT course in England.

A qualifying course must:

- lead, upon successful completion, to a recommendation to us for the award of QTS
- be delivered by an institution accredited by us as an ITT provider (which may be in partnership with a lead school for School Direct (tuition fee) courses)
- have been granted permission to recruit from us, in accordance with the [Initial Teacher Training allocations methodology: 2019 to 2020](#) - lead schools and ITT providers will only attract funding for trainees in the subjects identified in [Annex A: list of subjects eligible for a bursary](#).

Courses that enable a trainee to be recommended for the award of Qualified Teacher Learning and Skills (QTLS), or solely an academic award such as a Postgraduate Certificate in Education (PGCE) without QTS, are not eligible for training bursary or scholarship funding.

## Determination and notification of eligibility

You must determine whether a trainee is eligible to receive a bursary and inform them in writing if this is the case. More information on bursary eligibility is available in the [admissions](#) section of this manual.

You should make sure that trainees are informed of whether they're eligible for the bursary in good time before the start of their ITT course. An individual is only eligible for a bursary when this is confirmed in writing by their ITT provider. We cannot provide written confirmation to trainees.

## Terms and conditions of the bursary

To receive a bursary, trainees must agree in writing to comply with the terms and conditions of the bursary scheme.

These include:

- promptly informing their ITT provider of any changes in their bank account and address details
- promptly informing their ITT provider of their intention to withdraw from the course
- signing a declaration of understanding to the effect that they expect to seek a teaching post in England on successful completion of their course

You must make clear in the terms and conditions the implications of not completing the course.

The terms and conditions must make clear how the ITT provider intends to pay the trainee. The [bursary and scholarship payments](#) contains more details on payment patterns.

If a trainee is found to be ineligible for the bursary, we'll recover any bursary payments made by you. You must make all reasonable efforts to recover bursary payments from your trainee.

## **Possession of, or eligibility for, QTS**

Individuals who hold QTS on the first day of their ITT course are not eligible for a training bursary. Separate continuing professional development (CPD) may be appropriate for those who already hold QTS.

Under current reciprocal arrangements, qualified teachers from countries in the European Economic Area (EEA) or Switzerland may be able to receive QTS following application to us. Teachers who qualified in Australia, Canada, New Zealand and the USA can also apply to us to be awarded QTS.

You must advise applicants in both of these categories to apply to us where potential equivalency is identified during the recruitment process, for example during application or interview stage. Teachers who are successful in their application and receive QTS will not be eligible for a bursary. You can continue the bursary assessment of those trainees that are unsuccessful in their application to us.

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

Individuals who hold QTLS status and are members of the Society for Education and Training (SET), formerly the Education and Training Foundation (ETF), are



recognised as qualified teachers in maintained schools in England. They must continue to maintain their registration with SET for this recognition to be valid. They will still be able to apply for an ITT place and in turn receive a bursary. However, they must meet all the criteria specified in [eligibility for training bursaries](#).

Individuals who hold Early Years Teacher Status (EYTS) are also still able to apply for an ITT place and in turn receive a bursary. However, they must meet all the criteria specified in [eligibility for training bursaries](#) to be eligible.

## **Paid teaching work**

Trainees receiving bursary payments must not receive a salary or other payment for any type of teaching work which contributes to their training whilst undertaking their ITT course.

Trainees are deemed to be employed as a teacher if they are employed under a contract of employment or services with one or more local authority, governing body or institution to:

- be the headteacher or principal of one or more schools or institutions
- carry out one or more of a range of specified activities at one or more schools or institutions

This definition of a teacher can include people employed by a local authority to teach as a supply teacher in schools maintained by that authority, but does not include people employed by private teacher supply agencies or private tutors.

The definition of a teacher includes “unqualified” teachers who meet one or more of the descriptions set out in paragraphs 2 and 4-9 of schedule 2 in the [Education \(Specified Work and Registration\) \(England\) Regulations 2003 \(no 1663\)](#).

Under this definition, teachers are permitted to carry out ‘specified activity’, including:

- delivering lessons
- assessing the development, progress and attainment of pupils

Please review [these regulations](#) for the full definition of specified activity.

## **Undertaking other ITT courses, training schemes or programmes that leads to QTS**

To be eligible for a training bursary, trainees must not simultaneously undertake any other:

- ITT course
- training scheme
- programme leading to QTS

## Admissions

You must make sure that those responsible for decisions on bursary eligibility 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 may include:

- overseas qualifications
- professional or vocational qualifications
- qualifications no longer available but held by mature applicants

You should be aware of the range of degrees awarded by UK institutions. In all cases, you're responsible for deciding whether an individual's highest relevant academic qualification meets the bursary eligibility criteria. This includes determining whether a particular qualification demonstrates the breadth and type of academic engagement that would be expected from a bachelor's, master's or doctoral degree.

Where ITT providers lack the institutional experience to assess the validity of academic qualifications they should refer to the [Framework for Higher Education in England, Wales and Northern Ireland](#).

Further guidance about how to assess the equivalency of UK qualifications is provided in [Annex B: assessing UK academic qualifications](#).

## Teaching outside of England after the award of QTS

ITT providers should seek assurances from trainees in receipt of a bursary to the effect that they understand that they will be expected to seek a teaching post in England upon successful completion of their course.

We'll collect data on trainees who are not domiciled in England and are accessing bursaries. We reserve the right to request further information from ITT providers with high levels of trainees who are domiciled outside of England.

Further information about assessing the equivalency of overseas qualifications is provided in [Annex C: accessing overseas qualifications](#).

# Scholarships programme

We work with a number of professional bodies to award scholarships for trainees on courses in specific subjects. There is a:

- £28,000 scholarship available for trainees on physics, chemistry, computing, geography and languages courses
- £22,000 for trainees on secondary mathematics courses

A scholarship award replaces a trainee's bursary eligibility. Trainees who apply for but do not gain a scholarship may be eligible for a training bursary award. Trainees cannot receive both the scholarship and training bursary.

We're responsible for administering scholarship payments to you. These payments will be made via the standard training bursary funding process.

The relevant professional body will assess applicants for eligibility for the scholarship and inform the individual if they have been recommended for the scholarship. They should use their discretion when considering degree classification and subject knowledge. Further details can be found on the websites of the relevant organisations.

The applicant must secure an eligible physics, secondary mathematics, chemistry, computing, geography or languages ITT tuition fee based (provider-led or School Direct tuition fee) programme place by 1 September 2019 for the scholarship award to be valid.

An applicant will lose their scholarship entitlement if they are unable to secure a place on an eligible course by this date.

Courses that enable a trainee to be recommended for the award of QTLS, or solely an academic award such as PGCE without QTS, upon successful completion are not eligible for training bursary or scholarship funding.

It's not necessary for applicants to secure an eligible ITT place before applying for a scholarship. They may apply for the scholarship at any time before applying for or starting an ITT place.

Trainees are responsible for informing their ITT provider (and providing evidence) that they have been recommended for a scholarship.

You must make sure that each trainee in receipt of a scholarship is identified appropriately within the ITT Census.

You remain responsible for selecting trainees for courses regardless of their recommendation for a scholarship. Recommendation for a scholarship does not override, or take priority over, the eligibility criteria as set out in [eligibility for training bursaries](#). Trainees must meet all the eligibility criteria to receive the scholarship funding.

Trainees are advised to visit the [Get into Teaching](#) website for more information about scholarship awards.

## Bursary and scholarship payments

You're responsible for the management and administration of bursary payments, including:

- assessment of eligibility
- awarding the bursary to the trainee
- drawing up terms and conditions relating to receipt of the bursary

If you pay the Student Loans Company (SLC) to administer the bursary, you remain responsible and accountable for the management of this funding.

You should make bursary and scholarship payments to trainees throughout the academic year as detailed in [Annex D: value and timing fo training bursary payments](#).

These payments are not taxable. However, as with student maintenance loans, they may be treated as capital income for the purposes of assessing income for trainees in receipt of state benefits. We advise you to direct trainees towards their local benefits office to check whether this may affect their eligibility for state benefits.

Trainees will be entitled to receive the first bursary payment if they are actively engaged on the ITT programme on the first day of the month following their start date.

### Example

A trainee commencing their course in September 2019 will be entitled to their first payment if they are on the programme on 1 October. They'll be entitled to the second payment if they are on the programme on 1 November respectively. This is regardless of the provider's individual payment date.

In the event that a trainee completes their course prior to the end of the academic year, they may receive the full balance of the bursary in the month of completion.

Training bursary funding must not be given as:

- part of maternity or paternity pay arrangements
- during a period of unauthorised absence

In the event that a trainee is absent through sickness, you may only make one further payment following the first day of absence. After this, the absence should

be treated as a period of deferral and payments must stop with immediate effect.

## Withdrawals and deferrals

Eligible trainees who withdraw or defer from a course will be entitled to be paid the training bursary for each month up to, and including, the month in which they formally withdraw.

### Example

If a trainee starts their programme in September 2019 and withdraws or defers in January 2020, they'll be entitled to 4 payments in total as they were active on the course on:

- 1 October 2019
- 1 November 2019
- 1 December 2019
- 1 January 2020

Withdrawal or deferral information should reflect the dates given to Student Finance England for student support purposes.

In the event of withdrawal or deferral, you must:

- suspend all bursary payments to the trainee immediately
- make sure that their records are updated in the [Teacher Training Portal \(TTP\)](#) - detailing the formal withdrawal date

We'll clawback any overpayments made to you after the trainee has withdrawn or deferred, and will not reimburse you any payments made to trainees in error.

We expect you to recover any bursary overpayments from trainees.

## Returning trainees

Returning trainees who defer and then rejoin their original course, or take any advanced standing or credit to a new ITT course, will only be eligible to receive the remaining bursary award, up to the value which was available in the year they started their original course. A bespoke payment schedule may be agreed for the remaining amount between you and the trainee.

Where the length of the course is increased, the bursary instalments can be amended to reflect the longer timeframe. The total bursary amount, however, is

fixed and cannot be increased.

If a trainee leaves one ITT course and joins a new one with no transfer of standing or credit from their previous course, and they are being charged a new tuition fee, this is viewed as a separate route to QTS. They'll be entitled to receive a new bursary, subject to the eligibility criteria and rates set in this guidance.

If the trainee received their full bursary entitlement during a previous ITT programme, this may impact their eligibility to receive bursary funding while completing a new programme in academic year 2019 to 2020. Please contact the Funding Team at [ITT.Funding@education.gov.uk](mailto:ITT.Funding@education.gov.uk) for further advice.

## Monitoring, assurance and data requirements

### Monitoring and assurance

We have a responsibility to make sure that public funds and assets generated from applicable ITT places are properly managed in line with the grant funding agreements held by ITT providers.

You'll be required to demonstrate that you have administered all bursary funding in accordance with your grant funding agreements, including:

- selecting and recruiting the highest quality candidates to programmes of ITT
- designing and delivering high quality programmes of ITT
- rigorously assessing trainees against all of the relevant standards for QTS, and only support the recommendation of those trainees that have been deemed to have met them
- demonstrating propriety and adequate controls in your financial management, and comply with relevant financial reporting or governance requirements
- complying with our data requirements and requests as stipulated in all our guidance
- passing on 100% of the training bursary funding issued to you under this agreement to the trainee in order to support them to achieve the aims set out above

You must hold full records of all trainees in receipt of bursaries, including evidence of trainees' academic qualifications achieved prior to starting their ITT.

Trainees must hold the highest eligible qualification on which their assessment was based, prior to starting the course. We reserve the right to request this evidence at any point during the academic year from you, for the purpose of

quality monitoring and funding assurance. This may include copies of original documentation provided by trainees, including qualification certificates.

We also expect to see evidence of:

- payments you've made to trainees
- evidence of trainee attendance or 120 days training
- skills tests (passes and withdrawals)
- confirmation of any dates you have made reference to

It's advisable that the previous two years' worth of records are kept after the cohort have finished as the majority of returning trainees will be from the previous year.

We'll use the annual and interim census data collections and the Annex G process to seek rigorous assurance about the bursaries you've allocated. Your accounting officer will be required to verify these data sets.

We'll issue more detailed guidance regarding the Annex G process at the end of academic year 2019 to 2020.

We'll review the allocated training bursary funding that you receive and reconcile this amount with the trainee records submitted at each census point. Funding will be adjusted at these points to meet the actual amount required. Where funding received has exceeded the total amount required for actual trainees, we'll recover the excess by means of invoice or by offsetting against future payments.

Remember to make sure that all trainee records on the [Teacher Training Portal \(TTP\)](#) are complete. This includes amending the records of trainees who:

- withdraw or defer from their ITT programme
- start later in academic year 2019 to 2020
- return from earlier academic years

We reserve the right to delay or withhold payments if data is inaccurate or incomplete.

We'll carry out a reconciliation exercise between the bursaries allocated, and the actual trainee records as confirmed by the HESA and SCITT data collection exercises. In the event of any variances, particularly with regard to unclassified degrees, we reserve the right to ask you for explanations of the variances and to seek further information. We won't reimburse you for any bursaries paid to ineligible trainees.

You'll be asked to complete an Annex G in accordance with published guidance, containing income, expenditure and trainee data, which has to be independently audited and countersigned by the Accounting Officer and chair of governors or an appropriate board ([Annex F refers](#)).

We'll use this information to reconcile the funding you have received with your

declared expenditure taking into account the effect of withdrawn and deferred trainees. Prior to the Annex G we'll request an interim return to provide an indicative training bursary expenditure figure so that we know what is likely to be spent on the programme.

We'll write to you regarding the interim indicative return and will issue more detailed guidance regarding the Annex G at the end of academic year 2019 to 2020 so that you're able to comply with the Grant Funding Agreement requirements.

Failure to fully comply with the monitoring and assurance requirements in [ITT allocations and funding](#) may result in non-compliance, which may lead to the withdrawal of your accreditation.

## **Data requirements and reporting**

You must work with your lead school to submit relevant data to us, including:

- the data required to complete the ITT Census return in October 2019
- applications
- recruitment and employment outcomes

Failure to comply with requests for data may result in non-compliance, which may lead to the withdrawal of your accreditation.

### **Data requirements for schools**

Lead schools are required to give accurate data to their partner ITT provider about the schools in which each trainee is undertaking training. This must include the dates of the training periods so that this can be uploaded onto the [Teacher Training Portal \(TTP\)](#).

### **HEI providers**

Trainee data will be collected via the Higher Education Statistics Agency (HESA) ITT In Year Record. You're required to submit trainee-level data. Trainees will have teacher training course codes which will be confirmed in due course.

Once all data has been imported into the [Teacher Training Portal \(TTP\)](#)-, School Direct ITT providers are required to identify the lead school and up to five placement schools for each trainee.

Details of the process are available in the TTP guidance document. Further information on this is sent out before the start of each new academic year.

### **Non-HEI providers**

Non-HEI ITT providers need to submit trainee-level data.



Provider-led or School Direct trainees can be identified by selecting the appropriate route options on the trainee form. For School Direct, ITT providers will be required to indicate the lead school and up to five schools where the trainee will be undertaking their training during their ITT course.

Full details of the process are available in the TTP guidance document. Further information on this is sent out before the start of each new academic year.

Any queries regarding the submission of trainee-level data to us should be directed to the Data Team at: [ITT.datamanagement@education.gov.uk](mailto:ITT.datamanagement@education.gov.uk).

## ITT allocations and funding

The [Initial teacher training allocations methodology: 2019 to 2020](#) is now available.

## Annex A: list of subjects eligible for a bursary

We'll provide bursaries for the following ITT programmes:

- primary with mathematics
- biology
- chemistry
- classics
- computing
- design and technology - including engineering and food technology
- English
- geography
- history
- secondary mathematics
- modern foreign languages
- music
- physics
- RE

Funding will not be provided for any subjects that are not included on this list.

# Annex B: assessing UK academic qualifications

## Honours and ordinary bachelor's degrees

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.”

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.

Ordinary bachelor's degrees are largely a taught degree programme with less specialisation or independent study involved. The outcome can sometimes be a license to train in a particular subject, such as accounting. A trainee may sometimes be transferred from an honours programme onto an ordinary degree programme if they've not achieved the required grades throughout the programme to graduate with honours.

Open degrees from the Open University awarded without honours would fall into this category and would not be 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 the level necessary for bursary eligibility. Trainees in this position are advised to contact the Open University for advice.

## Medical first degrees

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

You may consider five-year degrees in medicine, dentistry, veterinary science and surgery as equivalent to a 2:1 degree for the award of a bursary. A first or distinction in an integrated master's medical degree can be considered equivalent of a first class degree for the purpose of awarding a bursary.

There are also medical bachelor's degrees which may be awarded as exit awards to students 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). You can consider these degrees equivalent to a 2:2 degree for the purpose of awarding a bursary.

A number of award titles may be used in both categories of award. We advise you to check individual cases with the relevant awarding bodies before making a decision about awarding bursaries.

## List of eligible academic qualifications

You can determine what bursary award trainees will get, based on their highest academic qualification.

If a trainee has a:

- doctoral degree or a medical masters degree (distinction) they're eligible for a **first class degree bursary**
- master's degree they're eligible for a **2:1 honours degree bursary**
- other degree award they're eligible for an **other degree award bursary**
- ordinary degrees, aegrotat and no first degree they are not eligible for a bursary

Honorary doctoral degrees are not recognised.

Masters degrees do not include those granted on application by the University of Oxford or Cambridge.

ITT providers cannot consider aegrotats, non-honours or ordinary degrees as suitable equivalency for a bursary award. Aegrotats are degrees awarded if a trainee was unable to sit their final exams due to illness and are not eligible for the bursary in their own right.

Trainees who do not hold a first degree or equivalent at a grade relevant to the training bursary rates for their ITT subject will not be eligible for a bursary in principle, unless they have an eligible relevant higher academic qualification.

You cannot consider a postgraduate certificate (PGCert) or diploma (PGDip) as suitable equivalency for a bursary award.

## Doctoral and master's qualifications

Doctoral and master's level qualifications may include other UK qualifications deemed by you to have the same level of academic breadth and depth.

If you use a higher academic award, such as a doctoral or master's, to award a higher bursary award to a trainee you must seek confirmation that the qualification was completed before the start of the ITT course.

If the outcome is not yet known, the bursary award must be made based on the highest relevant academic award on the date the training course started. If the trainee successfully gains the higher award a retrospective uplift can be applied. Please contact [ITT.funding@education.gov.uk](mailto:ITT.funding@education.gov.uk) for more further guidance in these circumstances.

## Master's degrees

The 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, programme 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.

These do not include the Master of Arts (MA) which are granted, on application, by Oxford, and the University of Cambridge, to graduates of these universities with a Bachelor of Arts (BA). Master's degrees which are offered as part of a trainee's route to QTS, will not count for the purposes of assessing eligibility.

## Integrated master's degrees

Integrated master's degrees are undergraduate programmes extended by one year to enable students to reach master's level. Providing they have reached a suitable standard of achievement after 3 years of bachelor's-level study, students can study for a fourth year for a master's degree where the academic level of work in the fourth year is at master's rather than at bachelor level.

These programmes are normally found in science and engineering academic disciplines, and the usual degree awarded is MEng (Master of Engineering) 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 and trainees who have achieved a distinction are eligible to receive the top tier bursary.

Trainees who took an integrated master's but didn't have a degree classification or pass/merit distinction, can be considered for the higher bursary, but you will be required to demonstrate that the trainee is of high quality. Trainees that 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**

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 lead usually to awards which include the name of the discipline in their title. Common examples include:

- Doctor of Education (Ed.D)
- Doctorate in Clinical Psychology (DClinPsy)
- Doctor of Business Admin (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 the Quality Assurance Agency (QAA) as academic qualifications.

# **Annex C: assessing overseas qualifications**

## **Overseas degree equivalency table**

When selecting trainees with overseas degrees, you should make sure that they comply with the ITT 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, Master's or Doctorate level.

However, 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.

UK NARIC has produced an overseas degree equivalency table to help you determine 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 first class, 2:1 or 2:2 honours degrees. A summary of the methodology used to produce the table is available on the [overseas degree equivalency table](#).

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, we 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.

The overseas degree equivalency table is intended as an advisory guide. You should use your professional judgement in determining eligibility. UK NARIC does not recommend applying the methodology or table in other contexts.

You must hold full records of all trainees in receipt of bursaries, including any qualifications or training they referenced in their application which was achieved before starting their ITT.

We reserve the right to request these details at any point during the academic year from you, for the purpose of monitoring quality.

This may include:

- copies of original documentation provided by trainees, including qualification certificates
- correspondence related to the decision making process

## **Qualifications not included in the equivalency table**

It is important to note that many overseas qualifications sit either above or below

British bachelor (honours) and British bachelor degree standard. Therefore they 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. ITT providers may wish to seek a Statement of Comparability from UK NARIC to verify the actual degree itself before making any judgements about bursary eligibility.

If a trainee has an overseas qualification you should use the overseas degree equivalency table to determine which UK degree classification is its equivalent. If an overseas qualification is not equivalent to at least a second class honours degree, it will be considered equivalent to an ordinary or third class degree. Unless you consider, in your own assessment, that the degree should be equivalent to at least a second class honours degree and you are able to justify your assessment.

## **Grading not included in the equivalency table**

Where the trainee's first degree can be compared to British Bachelor (Honours) and British bachelor degree standard but there is no actual grading of the degree available, ITT 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. ITT providers are advised to seek a transcript of the trainee's degree or further evidence of the trainee's achievement.

## **Countries not included in the equivalency table**

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, you must try and use your own professional judgement in the first instance to determine the equivalency of the qualification.

You're reminded that you 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.

Trainees who hold overseas master's and doctoral degrees may be assessed for eligibility independently of the overseas degree equivalency table. ITT providers should obtain a Statement of Comparability from NARIC if necessary.

Where a trainee's degree can be compared to UK master's or doctorate level, these degrees should be treated as equivalent, and the appropriate bursary award should be awarded for the [eligible ITT subjects](#).

You should use your professional judgement in determining any bursary awards for overseas master's or doctoral degrees which are not equivalent to a UK master's or doctoral degree. You must be prepared to build a strong case for

awarding a higher bursary than their qualification would suggest.

In exceptional cases, trainees who hold overseas bachelor's, master's or doctoral degrees that all sit below British bachelor honours degree standard, may be awarded a bursary if the ITT provider is able to provide a strong business case backed up by a full audit trail for bursary eligibility.

## Annex D: value and timing of training bursary payments

Full and part-time trainees must be present on the course on the first day of the month following their start date to be eligible to receive their first payment, and on the first of each subsequent month throughout the ITT programme to receive subsequent instalments.

The payment date itself is at your discretion.

### Example

A trainee commencing their course in September 2019 will be entitled to their first payment if they are on the programme on 1 October. They will be entitled to the second payment if they are on the programme on 1 November respectively.

This is regardless of individual payment dates.

After a trainee successfully completes the programme, they can be paid the balance of their bursary in the month of completion. Please refer to [bursary and scholarship payments](#) for full details, including the impact of withdrawals and deferrals.

These principles also apply for trainees who start their postgraduate or undergraduate courses later in the academic year. The payments, however, must not start before the trainee commences their course.

You must maintain a transparent audit trail of all payments made to trainees, and any decisions around payment structures, as we maintain the right to request this information at any time for assurance purposes.

### Payments for full-time courses

Bursary awards should be paid a minimum of ten equal monthly instalments over the duration of the course, as shown below.



<b>Bursary award</b>	<b>Value of monthly installements (for 10 month payment structure)</b>
£4,000	£400
£6,000	£600
£9,000	£900
£12,000	£1,200
£15,000	£1,500
£20,000	£2,000
£22,000	£2,200
£26,000	£2,600
£28,000	£2,800

## **Payments for part-time or modular courses**

Trainees on part-time or modular courses may agree a flexible monthly payment plan, which covers the duration of the part-time programme in order to avoid financial hardship for the trainee. However, you must make sure that the bursary payments reflect the proportion of the course that the trainee has completed at any point.

As part-time courses will span more than one academic year, you may award the bursary beyond the academic year 2019 to 2020. You are reminded that any bursary payments made after 31 July of the academic year will be included as expenditure for the following academic year, for example 2020 to 2021.

## **Scholarships**

The payment of scholarships should mirror the patterns for bursary awards of equivalent value on full-time and part-time courses, as appropriate.

## **Annex E: training bursary funding cycle**

The key dates in the bursary funding cycle are highlighted below.

## **June to July 2019**

SCITTs in their first year of delivery should submit grant funding agreements (GFAs) to us.

## **August 2019**

UCAS acceptance data is incorporated into the training bursary model. This allows us to make payments to you from September 2019. We'll write to you about funding amounts for September to November 2019 based on this.

The TTP is available for you to see bursary summaries and payment profiles.

## **September to October 2019**

The first 3 payments will be made if you have a GFA in place. This will be based on your UCAS acceptance data.

## **November 2019**

Your TTP data is incorporated into the training bursary model to confirm payments from December 2019.

This is based on:

- your trainee registration returns in the HEI and SCITT TTP, along the provider-led and School Direct (tuition fee) routes
- returns submitted on or before the census closure date

We'll write to you about funding amounts from December 2019 based on their your TTP data.

## **December 2019**

The fourth payment will be made if you have a GFA in place, based on your TTP data.

The TTP is available for you to see bursary summaries and payment profiles.

## **January 2020**

The fifth payment will be made if you have a GFA in place, based on your TTP data.

The TTP is available for you to see bursary summaries and payment profiles.

## **February to July 2020**

Your TTP data will be updated in the training bursary model in February 2019, to include any changes you submitted since the census was published..

The sixth payment will be made if you have a GFA in place, based on your TTP data. Any subsequent changes to your TTP data will be considered on a case-by-case basis.

The TTP is available for you to see bursary summaries and payment profiles.

## **Annex F: assurance and audit process**

The key events in the bursary funding cycle are highlighted below.

### **June to July 2019**

We'll send indicative Annex G documents sent to you providers in June 2020.

These should be returned by 31 July 2020.

### **September to December 2019**

We'll send final Annex G documents to you at the end of the academic year. We'll pre-populate it with the amount of funding you received. The completed document will help you to provide us with the necessary assurance for both the amount received and the purpose for which it was used. Further guidance on this process will be sent to you at the same time.

These should be returned by 31 December 2020.

# January to March 2019

Recoveries and reimbursements to be completed through:

- the payment profile
- other method, such as invoice

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