



# fundraising manual

Training bursary

for academic year  
**2009/10**



*developing people, improving young lives*

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Section

# Award and entitlement

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

## Overview

- 1.1** The bursary is a financial aid awarded to eligible trainees on eligible postgraduate TDA funded initial teacher training (ITT) courses (including additional experience), eligible subject knowledge enhancement (SKE) courses, and designated undergraduate courses, in order to assist with their living costs during training. For current rates and subjects please see the rates section at the back of this document.

## Postgraduate training bursary

- 1.2** The training bursary award for trainees on postgraduate ITT courses will depend on the ITT phase and subject specialism of their course. The award is not dependent on the length of the course.

## Subject knowledge enhancement

- 1.3** SKE bursaries are for trainees on designated SKE courses designed to help potential trainees gain the depth of knowledge needed to train to teach in their chosen subject before progressing into ITT. The SKE bursary is measured in units. SKE providers will receive funding based on the total number of units they have been allocated by the Training and Development Agency for Schools (TDA).

## Additional experience

- 1.4** Additional experience bursaries are a supplement to the standard postgraduate training bursary. The TDA has allocated additional experience places alongside postgraduate secondary ITT courses, and the bursary is to cover extra costs that trainees may incur when studying for the additional experience that will be incorporated into their standard ITT course.

## Undergraduate financial support

- 1.5** The undergraduate financial support is for trainees who are undertaking a designated two-year full-time undergraduate ITT course leading to qualified teacher status (QTS) in maths, physics or chemistry.

## Entitlement

- 1.6** The current rates for training bursaries will apply to eligible trainees who started their course after 31 July. However, trainees who started before 31 July and are returning to their course after a period of deferment or suspension may be entitled to receive the previous bursary award that was applicable to the year in which they started their ITT, for that subject. For guidance on bursary rates for previous academic years, please contact the ITT Funding Team at [ittfunding@tda.gov.uk](mailto:ittfunding@tda.gov.uk) or go to the TDA's website [www.tda.gov.uk/ittfunding](http://www.tda.gov.uk/ittfunding)

# Allocation of funding

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

## Allocation of funding

- 2.1** The training bursary funding allocation for providers includes the postgraduate ITT training bursary, additional experience, SKE and undergraduate financial support, and will cover all funding for these courses. The TDA will ensure in its calculations that there are sufficient funds to cover all bursary payments made by the provider.

## Allocation of postgraduate ITT training bursary

- 2.2** From 1 August 2009, the TDA will use data on providers' historical spending patterns to allocate their postgraduate ITT training bursary funding. This is to ensure that providers receive training bursary funding based on a realistic and informed projection of how the TDA expects providers to utilise their funding, and to also minimise adjustments.
- 2.3** Postgraduate ITT training bursary funding will be allocated to providers by calculating an average of their historical training bursary expenditure for the last two academic years. This average spend will then be used to calculate the training bursary funding to be paid to the provider. For instance, a provider who historically spends an average of 70 per cent of their total training bursary allocation will receive that percentage of their total training bursary allocation.

## Allocation of other bursaries

- 2.4** The funding for additional experience, SKE and undergraduate financial support bursaries will be allocated based on headcount allocations and not on historical spending data.

## Funding for extra trainees

- 2.5** The TDA will calculate the total allocation of training bursary funding based on the methodology above. It will then increase this by three per cent to ensure that there is sufficient funding for any extra trainees. The TDA recognises that trainees who interrupted or deferred their studies may come back to complete their course, and providers may experience greater recruitment than in previous years.
- 2.6** The TDA guarantees to increase a provider's training bursary funding if their original allocation is found to be too low. Providers should contact the TDA at **ittfunding@tda.gov.uk** to discuss arrangements where they are experiencing pressures on their training bursary budget.

# Payment to providers

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

## Payments to providers

- 3.1** Training bursary funding is paid to providers electronically by BACS payment and will be included in the monthly ITT payment that providers receive at the start of each month.
- 3.2** Providers will receive their training bursary funding over a 12-month period from August to July in monthly instalments. The size of the instalments may vary but the TDA aims to pay ITT providers 60 to 70 per cent of their training bursary funding during the eight-month period from August to March, and the balance of their funding over the remaining four-month period.
- 3.3** This pattern of payments is to allow flexibility for the number of different bursaries now held under this single system. Where providers' own payment patterns differ to those of the TDA they are encouraged to contact the ITT Funding Team at [ittfunding@tda.gov.uk](mailto:ittfunding@tda.gov.uk) to discuss.
- 3.5** The administration funding and corresponding VAT contribution may change in line with adjustments to training bursary funding. Please see section 7 for the current training bursary administration rates.
- 3.6** Providers who have training bursary funding for SKE, additional experience and undergraduate financial support courses are expected to follow the same procedures and guidelines for administering their bursaries as they would for the postgraduate ITT training bursary.

## Administration and VAT

- 3.4** In addition to the training bursary funding that providers receive, the TDA will also allocate a separate amount of administration funding to each provider to assist with the costs they will incur in administering training bursary payments. Providers who have registered their VAT details with the TDA will also receive a VAT payment on this amount. In exceptional circumstances the administration fee may cover a contribution towards the costs of the Student Loans Company's higher education bursary scheme. This funding is not ring-fenced.

# Payment to trainees

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

## Payments to trainees

- 4.1** Providers should only make payments to trainees who meet, and continue to meet, the eligibility criteria as set out in section 6.
- 4.2** Providers have flexibility with the timing of the bursary payments to trainees but are expected to pay the training bursary to trainees by the fifth working day of each month. Payments of all bursaries should normally be monthly and equal in size. Beyond this, providers should ensure that the profile of payments is in line with the guidance below and meets the needs of the trainee.
- 4.3** For courses that last for less than one month, and additional experience courses, providers should pay trainees their bursary award at an appropriate point during the course. For SKE courses, providers should ensure that the total funding is paid according to the unit length of the course.
- 4.4** Providers must inform their trainees well in advance of commencing their course of how and when they are to be paid their training bursaries.

## Payments to flexible trainees

- 4.5** Providers may use flexibility in administering the bursary award to trainees on flexible routes and should ensure that it does not have a negative financial impact on the trainee. Providers may wish to administer the training bursary to trainees in two or more lump instalments for the duration of their course or in equal monthly instalments as would be the procedure for a trainee on a full-time course. If the bursary is to be paid in lump instalments, then no more than 50 per cent of the bursary award should be paid to the trainee in each half of the course.

# Payment to trainees

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

## Modes of study and payment methods

Course	Priority secondary subjects	Non-priority secondary subjects	Primary
<b>One-year full-time postgraduate course</b>	£9,000 in equal monthly instalments for the duration of the trainee's course	£6,000 in equal monthly instalments for the duration of the trainee's course	£4,000 in equal monthly instalments for the duration of the trainee's course
<b>Part-time postgraduate course</b>	£9,000 in equal monthly instalments for the duration of the trainee's course	£6,000 in equal monthly instalments for the duration of the trainee's course	£4,000 in equal monthly instalments for the duration of the trainee's course
<b>Flexible postgraduate course</b>	£9,000 administered in equal instalments	£6,000 administered in equal instalments	£4,000 administered in equal instalments
<b>Two-year full-time undergraduate course</b>	£7,000 in equal monthly instalments for the duration of the course	N/A	N/A
<b>Subject knowledge enhancement course</b>	Total amount will depend on the number of units. Payments should be made in equal monthly instalments where appropriate. Payment for short courses should be made at an appropriate point in the course.		
<b>Additional experience bursary</b>	Payments should be made at an appropriate point during the additional experience.		

## Changing modes of study

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

## Withdrawals

- 4.7** Eligible trainees who withdraw from their course are entitled to be paid the training bursary for each month up to and including the month in which they withdrew. Trainees will only be entitled to receive the bursary payment for that month if they were still on course at the date the payment was made.
- 4.8** In the event of withdrawal, the provider must suspend all bursary payments to the trainee immediately and ensure that their records are updated to reflect the trainee as having withdrawn from the course. The TDA will not reimburse providers who have paid the training bursary in error to trainees who have already withdrawn from their course, and expect providers to recover any overpayment of the bursary from trainees if they have been paid in error. Providers should not make any pro rata payments of training bursaries to trainees.

## Returning trainees

- 4.9** Trainees who leave and then rejoin their course will normally only be eligible to receive up to the value of the bursary award applicable for the academic year in which they started. In extenuating circumstances, where the resulting total period of the course greatly exceeds the length, eg, the length of the course has now changed, and the trainee needs to complete a longer period of the course than expected when they first joined, providers should contact the TDA for further guidance.
- 4.10** If a trainee leaves one ITT course and joins a new ITT course, even with a different provider, and takes with them advanced credits or standing from their previous ITT course, then this is viewed as a single route to qualified teacher status (QTS). Therefore the trainee will only be eligible for a training bursary up to the value stated in section 7 of this document.
- 4.11** Providers are asked to exercise their judgement when taking onto their courses students who have previously embarked on a route to QTS against new applicants with no experience of ITT. Providers must be satisfied that these trainees will be able to gain QTS if accepted onto the course.

# Audit and adjustment

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

## External audit of ring-fenced funding

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

## Expenditure and reporting

- 5.3** Providers should report only cash expenditure of all training bursary trainee funding in their audited accounts, which is inclusive of SKE, additional experience and undergraduate financial support. This does not include the administration fee paid to providers to assist in administering the postgraduate bursary, or VAT payments.
- 5.4** Providers should not include anything paid after 31 July of that academic year. The TDA will not include accruals in this total expenditure, so any underspend as a result of withdrawals, deferments and suspension of payment must be accounted for. Providers must not retain funds in anticipation of trainees returning to their studies.

## Adjustment and recovery

- 5.5** The TDA will recover in full any unused part of a provider's training bursary funding in line with the audited accounts received from providers. This will be done by offsetting the recovery against other payments from the TDA. Training bursary adjustments will take place in the same year that the audited accounts are processed by the TDA.

# Eligibility criteria

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

## Postgraduate bursary eligibility criteria

- 6.1** To be eligible for the training bursary an ITT trainee must, from the first day of training, meet and continue to meet the eligibility criteria set out below. If at any point a trainee becomes ineligible, providers should suspend payment of the bursary immediately. This should include trainees who have started the course then found by the General Teaching Council for England (GTCE) to be unsuitable upon provisionally registering with them.
- 6.2** The eligibility criteria to receive the training bursary are that an ITT trainee must:
- meet the requirements for entry onto a postgraduate ITT course
  - not already be qualified to be a schoolteacher
  - not already be employed in a school or institution as a teacher
  - not be undertaking any other ITT course or training programme
  - be an 'eligible student' for the provision of student support
  - have been notified by their ITT provider that they are eligible
  - be taking a qualifying ITT course, and
  - comply with the terms and conditions of the new bursary scheme.

### Eligibility criterion 1

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

- 6.3** In order to satisfy eligibility criteria, the trainee must meet all entry requirements as laid out by the Secretary of State.

These can be found at

**[www.tda.gov.uk/qts](http://www.tda.gov.uk/qts)** Trainees must be put forward for provisional registration with the GTCE prior to commencing their ITT course. But if their registration is found to be unsuccessful they will not be registered and they will become ineligible for the bursary.

### Eligibility criterion 2

#### The ITT trainee must not already be qualified to be a schoolteacher

- 6.4** ITT trainees who are already qualified to be a schoolteacher on the first day of their ITT course are not eligible for the training bursary. ITT trainees who qualify to be a schoolteacher during the period of their ITT course become ineligible from the date on which they qualify. ITT trainees will be deemed to be qualified as a schoolteacher, and therefore ineligible for the training bursary, if:
- they have been or are awarded QTS by the GTCE
  - they have not been awarded QTS by the GTCE, but meet one or more of the descriptions of 'qualified teacher' set out in paragraphs 2 to 13 of part 1 of schedule 2 of the Education (School Teachers' Qualifications) (England) Regulations 2003, no 1662, or
  - they do not meet one or more of the descriptions of 'qualified teacher' set out in paragraphs 2 to 13 of part 1 of schedule 2 of the Education (School Teachers' Qualifications) (England) Regulations 2003, but could do so without the requirement to undertake a further ITT course of assessment against the specified standards for the award of QTS.

For further guidance on qualified teacher criteria, please contact the GTCE at

**<https://www.gtce.org.uk>**

# Eligibility criteria

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

## Eligibility criterion 3

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

**6.5** ITT trainees who are already employed as a teacher in a school or institution on their first day of their ITT course are not eligible for a bursary. ITT trainees who become employed as a teacher in a school or institution after the start of their ITT course become ineligible to receive the bursary from the date they start this employment.

**6.6** ITT trainees are deemed to be employed as a schoolteacher if they are employed under a contract of employment or services with one or more local authorities or governing bodies of schools or institutions to:

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

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

**6.7** The definition of a schoolteacher includes qualified teachers who do not have full registration with the GTCE as well as qualified schoolteachers who are fully registered. Qualified teachers who do not have full registration may include qualified teachers who have failed to complete an induction period satisfactorily.

**6.8** The definition of a schoolteacher includes 'unqualified' teachers who meet one or more of the descriptions set out in paragraphs 2 and 4 to 9 of schedule 2 of the Education (Specified Work and Registration) (England) Regulations 2003, which are amended from time to time, and are permitted to carry out one or more specified teaching activities which include delivering lessons to pupils, and assessing the development, progress and attainment of pupils. Please review these regulations for full definitions of specified teaching activities.

**6.9** The specified teaching activities described above may count as teaching practice that leads towards the assessment of QTS. Providers should ensure that they communicate to their trainees that, if they undertake paid work in schools that constitutes teaching practice leading towards the assessment of QTS, they will become ineligible for the bursary.

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

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

## Eligibility criterion 4

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

**6.12** ITT trainees must not be undertaking any other ITT course, training scheme or programme.

## Eligibility criterion 5

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

**6.13** To be personally eligible to receive a training bursary, the ITT trainee must meet one or more of the definitions for being an 'eligible student' to receive grants and loans towards tuition fees and living costs as set out in the eligible student schedule of the current Education (Student Support) Regulations, found at [www.opsi.gov.uk](http://www.opsi.gov.uk)

## Eligibility criterion 6

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

**6.14** It is a matter for the provider of the ITT course to determine whether an ITT trainee is personally eligible to receive a bursary and whether they continue to be so.

**6.15** An ITT trainee must have been informed by their ITT provider that they are eligible in order for them to be eligible. They do not become personally eligible until the date the ITT provider has made that determination and informed them of their decision.

## Eligibility criterion 7

**The ITT trainee must be taking a qualifying ITT course**

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

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

**6.17** The TDA is the principal source of funding for most ITT courses provided by TDA-accredited institutions, and these ITT courses will be qualifying ITT courses for the purposes of determining eligibility for bursaries. However, TDA-accredited institutions can provide supplementary ITT courses for which an individual and/or another organisation or body is the principal source of funding. These ITT courses will not be 'qualifying ITT courses' for the purpose of determining eligibility for the training bursary. The only exceptions to this are for trainees in the Channel Islands or Isle of Man. These trainees may have their course funded by their own local government, not the TDA, but this will not prevent them being eligible for the training bursary so long as the trainees satisfy all other eligibility criteria.

# Eligibility criteria

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

## Eligibility criterion 8

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

**6.18** To qualify, or continue to qualify, ITT trainees must comply with some specific requirements. The first of these is to promptly give the provider of their ITT course any information the provider requires to determine (and, if that information or other circumstances change, to redetermine):

- whether or not the ITT trainee is an eligible ITT trainee
- the amount of the bursary payable to them – taking account of any bursary payment they may have received if they are returning to complete their studies
- the number, size and timings of bursary payment instalments, and
- the method by which the bursary payment instalments will be paid, and to make the payments.

It is also a condition of this scheme that an ITT trainee must:

- tell their ITT provider promptly about any material changes to that information, and
- repay promptly any overpayment of bursary to their ITT provider.

## Ineligibility and the bursary

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

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

## Subject knowledge enhancement

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

## Additional experience

**6.22** The additional supplement may only be paid to those selected postgraduate trainees undertaking additional experience as part of the secondary postgraduate ITT course.

**6.23** To receive the additional supplementary bursary, trainees must first be eligible to receive the standard postgraduate training bursary.

## Undergraduate additional financial support

**6.24** The eligibility criteria for the undergraduate additional financial support package remain the same as the eligibility for the postgraduate training bursary, except that the trainee must be on an undergraduate ITT route leading to QTS instead of a postgraduate route.

**6.25** The undergraduate financial incentive is only available to trainees on routes as agreed by the TDA. These routes will only be in the subjects set out in section 7 of this manual.

# Training bursary rates

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

## Standard postgraduate training bursary award rates and phase of study

Bursary award rate	ITT phase of study	ITT subject specialism
<b>£9,000</b>	Secondary priority subjects	Applied ICT Applied science Design and technology Engineering ICT Manufacturing Mathematics Modern languages Music Religious education Science
<b>£6,000</b>	Secondary non-priority subjects	Applied art and design Applied business Art and design Business studies Citizenship Classics Dance Drama English Geography Health and social care History Leisure and tourism Media studies Physical education Psychology Social sciences Diploma – Business, administration and finance Diploma – Creative and media Diploma – Society, health and personal development
<b>£4,000</b>	Primary at postgraduate level	All subject specialisms

### Additional experience subjects (14–19 diploma)

Bursary award rate	Diploma specialism
<b>£ 300</b>	Diploma – Business, administration and finance Diploma – Construction and the built environment Diploma – Engineering Diploma – Environmental and land-based studies Diploma – Hair and beauty studies Diploma – Hospitality Diploma – Humanities Diploma – Information technology Diploma – Languages Diploma – Manufacturing and product design Diploma – Public services Diploma – Retail business Diploma – Science Diploma – Sport and active leisure Diploma – Travel and tourism

### Undergraduate additional financial support

Bursary award rate	ITT phase of study	ITT subject specialism
<b>£7,000</b>	Secondary priority	Chemistry Mathematics Physics

### Training bursary administration funding

Administration funding will be calculated on the initial basis of two per cent of the total bursary funding allocated. For mainstream ITT providers a minimum of £5,000 administration funding will be guaranteed.

# Training bursary rates

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

## Subject knowledge enhancement subject groups for AY2009/10

Group	Subjects	Bursary unit
<b>A</b>	Chemistry Mathematics Physics	£ 400
<b>B</b>	Design and technology ICT Modern languages Music Other sciences Religious education	£ 400

## Subject knowledge enhancement bursary award rates

Number of units	Bursary award rate
<b>1</b>	£ 400
<b>2</b>	£ 800
<b>4</b>	£ 1,600
<b>6</b>	£ 2,400
<b>8</b>	£ 3,200
<b>10</b>	£ 4,000
<b>12</b>	£ 4,800
<b>14</b>	£ 5,600
<b>16</b>	£ 6,400
<b>18</b>	£ 7,200

### Glossary

#### BME

Black and minority ethnic

#### DCSF

Department for Children, Schools and Families

#### DIUS

Department for Innovation, Universities and Skills

#### EBITT

Employment-based initial teacher training

#### FEC

Further education college

#### GTCE

General Teaching Council for England

#### GTTR

Graduate Teacher Training Registry

#### HEFCE

Higher Education Funding Council for England

#### HEI

Higher education institution

#### ITT

Initial teacher training

#### OPSI

Office of Public Sector Information

#### PG

Postgraduate

#### QTS

Qualified teacher status

#### RRCG

Recruitment and retention challenge grant

#### SCITT

School-centred initial teacher training provider

#### SKE

Subject knowledge enhancement

#### UCAS

Universities and Colleges Admissions Service

#### UG

Undergraduate

### Contacts

General Teaching Council for England

ITT Funding Team

ITT Provider and Market Management Team

ITT provider extranet

Office of Public Sector Information

Requirements and guidance for ITT

TDA website funding pages

[www.gtce.org.uk](http://www.gtce.org.uk)

[ittfunding@tda.gov.uk](mailto:ittfunding@tda.gov.uk)

[allocations@tda.gov.uk](mailto:allocations@tda.gov.uk)

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

[www.opsi.gov.uk](http://www.opsi.gov.uk)

[www.tda.gov.uk/qts](http://www.tda.gov.uk/qts)

[www.tda.gov.uk/ittfunding](http://www.tda.gov.uk/ittfunding)

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