



National College for
Teaching & Leadership

Golden Hello eligibility criteria and guidance for academies (including free schools)

Operations Manual

May 2015

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Section 1 – Introduction

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

This document outlines the eligibility criteria that must be met in order to claim the incentive and explains how NCTL will reimburse academies for the golden hello scheme in the financial year 2015-16. The eligibility criteria guidance is used to assess all NCTL golden hello applications and should be read by teachers applying for a golden hello, and administrators responsible for assessing claims. This document relates to eligible postgraduate initial teacher training (ITT) courses starting between 1 August 2000 and 31 July 2011.

ITT providers were required to provide eligible teachers with a golden hello application form upon completion of their ITT.

The NCTL offers academies funding for the reimbursement of Golden Hello expenditure incurred.

The funding will reimburse costs relating to:

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

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

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

Section 2 - Eligibility Criteria

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

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

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

Training (ITT) eligibility criteria

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

Teaching eligibility criteria

- a) Eligible teachers must be a qualified schoolteacher and hold QTS
- b) Eligible teachers must have successfully completed their induction year.
Visit <https://www.gov.uk/government/publications/induction-for-newly-qualified-teachers-nqts> for further details on induction.
- c) Eligible teachers must be employed as a qualified schoolteacher in England in:
 - A maintained secondary school (including middle-deemed secondary)
 - A maintained or non-maintained special school (see www.nasschools.org.uk to identify status), or
 - A secondary phase academy / free school

- d) Teachers in private schools and sixth form colleges are not eligible for the golden hello.
- e) After a teacher has completed their NQT induction, they must have either a permanent employment contract or a fixed-term contract of at least one term's duration. Where the teacher has a permanent contract, they will not be eligible for the golden hello if notice to terminate the contract is given before the golden hello payment is received.
- f) The teaching post held by the teacher must contract them to teach at least 50 per cent of their teaching time in the subject they specialised in during ITT. The teacher must continue to be employed in an eligible role until receipt of the golden hello and must remain in post for at least the period from application to payment. Applicants who leave before payment of the golden hello will forfeit their eligibility.
- g) Supply teachers are eligible for golden hellos on the same terms as permanent teachers, provided that their contract with a school or LA is for at least one term. Supply teachers employed by private agencies are not eligible.
- h) City technology colleges (CTCs) receive funding for golden hellos as part of their unit of funding from the Education Funding Agency. Therefore, CTCs cannot claim a reimbursement from NCTL for any Golden Hello payments made to teachers. CTCs are under no legal obligation to spend their grant on golden hellos but are expected to meet the cost of golden hellos following the same principles as the national golden hello scheme. Teachers should check with the relevant CTC on its policy for paying golden hellos.

Application eligibility criteria

- a) Teachers must ensure their applications are made to the academy within 12 months of completing their NQT induction, or equivalent. NCTL will not reimburse golden hello payments for teachers that applied for the golden hello after 12 months of completion of the induction period has passed.
- b) This application time is extendable to 24 months in case of pregnancy or full-time caring responsibilities, and for any period during which a person is certified by a doctor as medically unfit to work as a teacher. Academies should make a request for an extension on behalf of the teacher by email to NCTL.
- c) Applicants must not have previously received a NCTL golden hello in England or the equivalent in Wales.

Section 3 – Payment Rates

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

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

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

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

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

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

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

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

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

Reciprocal agreements with Wales

There is a reciprocal agreement between England and Wales for the golden hello, known as the teaching grant in Wales. The golden hello/teaching grant will be payable to eligible teachers either in Wales or in England, but not in both. The eligibility criterion is that of the receiving country i.e. the country in which you are teaching when you become eligible for payment. **Please note that 2010/11 was the last academic year that teaching grants/Golden Hello's formed part of the ITT Incentive support for trainees.**

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

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

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

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

Initial Teacher Training Branch
Higher Education Division
Department for Education and Skills
Welsh Government
Cathays Park
CARDIFF
CF10 3NQ

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

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

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

Initial Teacher Training Branch
Higher Education Division
Department for Education and Skills
Welsh Government
Cathays Park
CARDIFF
CF10 3NQ

Do not submit your claim form until you have actually started work in your eligible post. If you have any queries or would like advice from the Welsh Government please call 02920 825838 or email teachingenquiries@wales.gsi.gov.uk

Applicants who trained in Scotland and Northern Ireland

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

The teacher will need to provide the Academy with information on their teaching qualification and induction (or the equivalent), their QTS certificate, and written confirmation of their current contract.

EU applicants

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

The teacher will need to provide copies of their teaching qualification, their QTS certificate and written confirmation of their current contract to the Academy. EU applicants must apply for the golden hello within 12 months of receiving QTS.

If the Academy has any concerns about the eligibility of a teacher under the National Scheme they should contact NCTL for further advice before making the payment, however responsibility for ensuring that a trainee meets the scheme criteria rests with the Academy.

Section 4 – Process of Claiming

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

- The teacher completes their ITT course and is provided with an application form from their ITT provider. Teachers who require a copy of this should contact their ITT provider. NCTL are not able to provide teachers a copy of the application form.
- The ITT provider completes their ITT provider section of the form prior to giving this to the teacher – this section confirms the ITT eligibility criterion.

The teacher achieves qualified teacher status (QTS).

- The teacher completes their newly qualified teacher (NQT) induction.
- The teacher obtains a teaching post in an eligible school, with either a permanent or a fixed-term contract of at least one term's duration.
- The teacher applies to the school for their golden hello once they have completed their induction. Their employing school completes the teaching eligibility section of the form - this confirms the teaching eligibility criterion.
- The academy assesses the teacher's application and pays the golden hello, if eligible, according to the criteria in this guidance.
- The academy retains the application form and ledger evidencing payment to the teacher, and completes the pro-forma in agreement with the terms and conditions and confirms payment eligibility.
- The academy submits the fully completed pro-forma to the NCTL as soon as practical via the following email address and in line with the guidance outlined within this document: TA.Legacy-Claims@education.gsi.gov.uk the email must be encrypted with a password emailed separately.
- Where academies have a contracted payroll provider, the request for funds may be completed by them on the academy's behalf, providing that the academy accounting officer has completed the declaration on the claim form following payment and submits the form.
- Academies are wholly responsible for checking that claims are eligible for payment and retaining documentation surrounding payments to teachers and claims made to NCTL. The NCTL will perform a check of a percentage of claims made for governance and assurance purposes.
- Any claim discovered to be deficient will be recovered in full and the academy may forfeit the right to submit claims in the standard fashion.

Section 5 – Payments and Financial Governance

Outline

The reporting and payment arrangements for the financial year 2015-16 are below and include the NCTL's expectations of governance, internal control and audit.

This section is supported by the terms and conditions of the funding scheme and the declaration, which is printed on every claim form. Academies are required to accept these in making any claim to the NCTL. Payments will not be made if this condition has not been satisfied.

Returns and payments

Throughout the year academies are required to complete and return a 2015-16 golden hello claim via submission of the pro-forma as soon as practical.

The pro-forma will constitute an invoice to NCTL and we will retain this for a minimum of 6 years.

The completed form should detail the Golden Hello expenditure incurred during that period. There are no deadlines for submission as such but the NCTL requests submissions as soon as practical after the payment has been made to the Teacher.

Claims received between 15 March 2016 and 31 March 2016 will be retained by NCTL and reimbursed in April 2016. If the Academy requires reimbursement within Financial Year 2015-16, the payment will need to be made to the teacher and the submitted before 15 March 2016.

Financial governance

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

As such, they must be signed by the academy accounting officer to ensure propriety and financial governance. Where claim forms are not submitted in this manner they will not be accepted for payment.

Signatures can be electronic (typed in) and are legally binding when emailed to the NCTL by the academy.

Any over funding or reimbursements made in error in FY 2015-16 or earlier years will be recovered forthwith

Submitting claims

All claims must be sent electronically to the NCTL via an encrypted email with a password in a separate email. The NCTL does not offer academies a choice of methods to submit claims. All claims must be by email and electronic transfer. Postal or paper submissions will not be accepted. Should you chose to email your claim without encryption, you do so entirely at your own risk.

The claim form consists of a declaration on the nature of the claim, an area to complete on the teacher being claimed for and the Terms and Conditions of Grant Funding being agreed to.

The pro-forma requires the following information:

Date of claim	The date you applying for reimbursement of the claim
Claim reference	A unique reference number for the claim, each line (each teacher claiming) requires an individual unique reference number.
Academy name	The name of the academy making the claim
Academy postcode	The postcode of the academy
Teacher name	The teacher's name in full
TRN number	The teacher reference number
Academic year	The year the teacher commenced their ITT course
Subject specialised	The subject the ITT course was undertaken
Date NQT induction completed	The date the teacher completed their NQT induction
Subject teaching	The teaching post held by the teacher for at least 50% of their teaching time
GH amount	The value of the golden hello incentive – in accordance with the rates detailed within this guidance
ERNIC amount	Sum equal to employers national insurance on the golden hello claim paid to the teacher
Bank name	The name of the bank that holds the academy account
Bank sort code	The 6 digit sort code
Bank account number	The 7 or 8 digit account number
Bank account name	The name on your account
Signed declaration	All claims must have the academy accounting officer's name and position on the form, and should be dated as point of signing.

Section 6 – Planning and Process

The NCTL accepts that an academy may not be in a position to fully forecast any payments due to uncertain recruitment; it does anticipate however that payment can be invoiced as soon as practical where the teacher remains in employment of the academy.

The NCTL will only make a payment to the academy to reimburse funds which has already been paid to or posted to be paid to the teacher concerned.

Academies should forward all claim forms to TA.Legacy-Claims@education.gsi.gov.uk when an incentive payment has been made.

Previous email accounts used for claims have been suspended and may not be accessed by NCTL staff. We cannot guarantee that claims sent to any other e-mail address will be considered.

The NCTL does not accept postal or paper based claims. Any item posted to us will not be considered.

Section 7 – Terms and Conditions of Funding:

Use of the funds

The funds are to cover the declared direct or indirect payment of golden hello incentives to eligible teachers and any associated Employee Related National Insurance contributions.

Management of the funds

The academy must have appropriate and effective financial systems in place for the management, accounting and auditing of claims and subsequent NCTL funding. Reimbursements will be made by the NCTL in accordance with the arrangements detailed in this document. The NCTL reserves the right to change these arrangements.

It is the academy's responsibility to ensure that the NCTL holds both correct bank and contact details for them; funds sent by NCTL to a declared bank which are incorrect may be unrecoverable and NCTL will not guarantee a replacement transaction.

Contract and reporting requirements

The academy must provide the NCTL with a named contact for all matters relating to the funding, and inform the NCTL immediately of changes to the named contact.

The academy:

- Shall respond promptly to reasonable requests for data and information by the NCTL. The academy will be responsible for the quality of this data.
- Provide the NCTL with authorised claims which will detail the expenditure that it has incurred in the financial year. The NCTL will provide the academy with supporting information on the scheme, on request.
- Verify expenditure from the accounting officer of the academy.
- The NCTL reserves the right to audit all claims and/or require the academy to submit independently audited end-of-year returns.
- The academy will comply with the Data Protection Act 1998 and arrange appropriately secure methods of sharing personal information with the NCTL where required.

Repayment and withholding of payments

Funding is dependent on the NCTL continuing to operate the scheme.

The NCTL will reimburse the academy in arrears for expenditure they incurred during the financial year. The NCTL will not make payments in advance.

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

Annex A – Contact and Useful Information

Contact information for Golden Hello at NCTL

Funding Delivery Team: FA.Team@education.gsi.gov.uk

Claims mail box: TA.Legacy-Claims@education.gsi.gov.uk

Useful Links

Guidance on ERNIC rates:

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

Previous year's eligibility for Golden Hello:

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

Notes on financial record keeping:

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

Annex B – Glossary

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



National College for
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