1968. No. 205 **[C]**

EDUCATION

Training Scholarships

REGULATIONS, DATED 29TH AUGUST 1968, MADE BY THE MINISTRY OF EDUCATION UNDER THE EDUCATION ACTS (NORTHERN IRELAND) 1947 TO 1968, WITH THE APPROVAL OF THE MINISTRY OF FINANCE.

The Ministry of Education (hereinafter referred to as "the Ministry") in pursuance of the powers vested in it by Sections 59 and 77 of the Education Act (Northern Ireland) 1947(a), and of all other powers enabling it in that behalf, and with the approval of the Ministry of Finance hereby makes the following Regulations:

1.—(1) These Regulations may be cited as the Training of Teachers (Scholarships) Regulations (Northern Ireland) 1968.

(2) These Regulations shall have effect from 1st September 1968.

(3) The Training of Teachers (Scholarships) Regulations (Northern Ireland) 1965(b) are hereby revoked with effect from 31st August 1968.

2. To be eligible for the award of a scholarship a student must be ordinarily resident in Northern Ireland.

3. Subject to the provisions of these Regulations—

(1) The Ministry shall award a scholarship to or in respect of each student admitted to a college of education in accordance with the provisions of the Regulations relating to the admission of students to colleges of education in Northern Ireland.

(2) The Ministry may award a scholarship to or in respect of any student admitted to any other institution approved by the Ministry for teacher training purposes.

4.—(1) Each scholarship shall, subject to satisfactory attendance, conduct and progress be tenable to the end of the period normally required for the completion of the course of study in respect of which the award was made.

(2) The Ministry shall extend the normal period of a scholarship to facilitate a scholar in changing his course or his college or institution where such a change is considered appropriate.

(3) The Ministry may extend the normal period—

(*a*) to enable a scholar to follow an associated course of study either during or at the end of the principal course; or

(*b*) to enable a scholar on account of illness or for other satisfactory reason to repeat any portion of a course.

(4) The Ministry may suspend or terminate a scholarship or withhold or reduce any payment normally due in respect of the scholarship if, after consulta-

(a) 1947. c. 3. (b) S.R. & O. (N.I.) 1965, No. 170.

tion with the authorities of the college or institution, it is of the opinion that the attendance, conduct or progress of the scholar is not satisfactory.

5.—(1) The value of a scholarship other than a scholarship to which paragraph (2) applies shall be determined annually in accordance with the provisions of the First or Second Schedule as appropriate.

(2) Where a scholarship is awarded—

(*a*) to or in respect of a student admitted to a college or institution outside Northern Ireland, or

(*b*) to or in respect of a student in whose case the application of the First or Second Schedule would, in the opinion of the Ministry, otherwise be impracticable or inappropriate;

the value of the scholarship shall be such as the Ministry, under arrangements approved by the Ministry of Finance, may determine.

6.—(1) Each application for a scholarship shall be in such form, contain such information and be accompanied by such documents as may be required by the Ministry.

(2) For the purpose of the annual determination of the value of a scholarship or of any reassessment deemed necessary by the Ministry, the scholar or his parent shall furnish such further information accompanied by such further documents as the Ministry may at any time require.

(3) The Ministry may take such steps as it considers necessary to satisfy itself of the accuracy of information furnished under the provisions of paragraphs (1) and (2).

7.—(1) A scholar who obtains any scholarship, exhibition or bursary under any other scheme, endowment or foundation, or who acquires any source of income or engages in any form of employment, shall immediately inform the Ministry.

(2) The scholar or his parent shall immediately inform the Ministry of any change otherwise in financial circumstances or place of residence.

8. A scholarship shall be paid in such manner as the Ministry may determine.

9. The Ministry may require the applicant or his parent to give an undertaking that the applicant will attend regularly at the college or institution and complete the course for which the award is tenable and that if for any reason attendance should cease before the normal date of termination of the award a refund will be made of such sum as may be determined by the Ministry to have been paid in respect of the period after attendance ceased, and any such undertaking may also provide for the refund of any advance made prior to notification of a change in financial circumstances under Regulation 7.

10. Where a scholar fails at any time to observe any of the conditions under which a scholarship has been awarded the Ministry may suspend or terminate the scholarship.

11. A scholar who held an award under the Training of Teachers (Scholarships) Regulations (Northern Ireland) 1965 shall continue to hold the award as if it had been made under these Regulations and the value of any such

continuing scholarship shall be determined either under the provisions of these Regulations or under the provisions of the former Regulations whichever is the more advantageous to the scholar.

Sealed with the Official Seal of the Ministry of Education for Northern Ireland this 29th day of August 1968.

(L.S.) *J. M. Benn,*
Secretary.

The Ministry of Finance for Northern Ireland hereby approves of the foregoing Regulations.

Sealed with the Official Seal of the Ministry of Finance for Northern Ireland this 29th day of August 1968.

(L.S.) *James V. Morrison,*
Assistant Secretary.

FIRST SCHEDULE

Ordinary Scholars

1. The provisions of this Schedule shall apply in accordance with Paragraph (1) of Regulation 5 in determining the value of scholarships other than scholarships assessable under the Second Schedule.

2.—(1) The value of a scholarship for each academic year shall be the maximum allowable amount calculated under Paragraph 3 reduced by any personal income of the scholar in excess of £100 (which term shall include other awards, bursaries or prizes held by the scholar from whatever source) and by a contribution assessed under Paragraph 4 on the income of the scholar's parents.

(2) Where the benefit from an award so reduced is less than £50 a minimum grant of £50 shall be payable.

(3) Personal income for the purpose of this Paragraph shall be net income, that is to say income received after the deduction of income tax and National Insurance contributions and Graduated Pension contributions, if any; and the following shall be ignored:—

(*a*) Vacation earnings.

(*b*) Disability pensions not liable to income tax and any service bounty received as a Reservist with the Armed Forces.

(*c*) Covenanted payments made to a scholar by a parent in respect of whom a contribution is assessed.

(*d*) Grants for specific educational purposes such as foreign travel, not provided for by the scholarship award:
Provided that the amount ignored shall not exceed expenditure actually incurred.

(*e*) Competitive prizes paid as a single payment which do not stipulate further study.

(*f*) Family allowances and any benefit under the Supplementary Benefits &c. Act (Northern Ireland) 1966.

3.—(1) The maximum allowable amount shall be the total of the approved fees charged by the college or institution, together with a standard grant towards term-time and vacation maintenance, travel and the cost of books and stationery and, where appropriate, an additional grant towards other items of expenditure as provided in sub-paragraph (3).

(2) (*a*) The standard grant towards term-time and vacation maintenance, travel and the cost of books and stationery shall consist of a basic element selected as appropriate from sub-paragraph (*b*) and an additional element calculated in accordance with sub-paragraph (*c*).

(*b*) The basic element shall be in accordance with the following:—

(i) Scholars living at home	£290
(ii) Scholars living in college hall or lodgings	£360
(iii) A married woman living in her husband's home where the husband is not a full-time student	£275

(*c*) The additional element shall be calculated as follows:—

(i) where the scholar attends the college or institution for any period over 30 weeks in a year, then a payment shall be made in respect of the excess period of £1 per day if the scholar lives away from home or of 11s. 6d. per day if he does not;

(ii) if, on the recommendation of the authorities of the college or institution, the scholar undertakes as part of his course a period of residential study away from his college or institution during term time and thereby incurs additional expenditure a sum not exceeding 22s. 6d. per day shall be included;

(iii) if, on the recommendation of the authorities of the college or institution, the scholar undertakes a course of vacation study under their guidance a payment of £1 per day shall be included in respect of such study if the scholar has to live away from home or of 11s. 6d. per day if he has not;

(iv) if the scholar is reading modern languages in an associated university degree course and, on the recommendation of the university authorities, undertakes a course of vacation study in the country (being a country outside the British Isles) whose language is a main language he is studying, and if he lives with a family approved by the university authorities, a payment of £1 per day shall be included;

(v) where the scholar necessarily incurs expenditure in excess of £12 on travel within the United Kingdom for the purpose of attending his college or institution or within or outside the United Kingdom for the purpose of attending a course qualifying for payment under (ii), (iii) or (iv) of this sub-paragraph, an amount shall be included to cover the excess expenditure.

(3) Additional grant may be added as follows at the discretion of the Ministry to the calculation of the maximum allowable amount:—

(*a*) Extra travelling:—

Expenditure necessarily incurred by a scholar on travel outside the United Kingdom for the purpose of his course.

(*b*) Vacation hardship:—

Extra grant towards maintenance during vacations in cases of financial hardship of not more than £5 10s. 0d. per week where no contribution is payable under Paragraph 4:

Provided that extra grant under this sub-paragraph may normally be allowed only for a maximum of 17 weeks and may be admitted only in respect of weeks of vacation for which no other payment is allowed under any other sub-paragraph.

(*c*) Dependants' grant:—

Where in the opinion of the Ministry hardship would occur payments in respect of the maintenance of the spouse and children of a scholar to whom the provisions of this Schedule apply, although the conditions specified in Paragraph 2 of the Second Schedule are not fulfilled:

Provided that payments made under this sub-paragraph shall not exceed the payments specified in Paragraph 4(1) of the Second Schedule, as reduced, where appropriate, in accordance with Paragraph 4(2) of that Schedule.

4.—(1) The parental contribution shall be ascertained for any year by reducing the gross income of the parents, computed in accordance with paragraph 6 by the amount of the deductions provided for in paragraph 5 and by applying the balance of income as follows:—if the balance of income is not less than £900 the parental contribution shall be £20 with the addition of £1 for every complete £10 by which the balance exceeds £900.

(2) Where two or more children of the parent hold scholarships awarded under these Regulations or equivalent scholarships (an equivalent scholarship for the purposes of these Regulations being either a University or Further Education Scholarship awarded by any education committee or any other scholarship judged by the Ministry to be equivalent) the contribution in respect of each shall be determined by finding the contribution for one of them and dividing it equally between them, unless a lower contribution would result if separate assessments were made for each.

5. To determine the balance of income the following deductions shall be made from gross income:—

(*a*) In respect of each child dependent on the parents other than the scholar and any other member of the family holding a scholarship awarded under these Regulations or an equivalent scholarship:

(i) an allowance of £200 less the amount of any gross income available to the child in his own right;

(ii) expenditure incurred on school fees and other educational expenses up to a maximum of £100; and

(iii) expenditure on university and other further education (including professional training) not covered by other awards, up to a maximum of £350.

(*b*) In respect of each adult dependent on the parents an allowance equal to the value of the assistance given by the parent but not exceeding £200 less the amount of any other income of the dependant after deducting income tax and National Insurance contributions and family allowances, if any.

(*c*) Mortgage interest on owner-occupied property and all other interest payments that are allowed for income tax purposes.

(*d*) Compulsory and voluntary contributions to superannuation funds (excluding National Insurance contributions and Graduated Pension contributions) and life insurance premiums up to a maximum of 10 per cent. of gross income.

(*e*) Where both parents are gainfully employed, an allowance towards the cost in wages of domestic assistance not exceeding the emoluments of the parent who earns the less, or £200, whichever is the less; or where a parent who is not a widow or widower is incapacitated, an allowance towards the cost in wages of domestic assistance, not exceeding £200; or where a parent who is a widow or widower is either gainfully employed or incapacitated, the cost in wages of domestic assistance, not exceeding £100.

(*f*) Gross payments made under covenant (other than payments covenanted by a parent in favour of the scholar) subject to a maximum deduction of £200 in respect of each beneficiary.

6. Gross income for the purpose of Paragraph 5 shall be the income of both parents from all sources, computed as for income tax purposes, except that in computing gross income no deduction shall be made which is of a kind for which separate provision is made in this Schedule:

Provided that where trustees of property held in trust for an infant award holder or for any other infant dependent on the parent pay, by virtue either of Section 32 Sub-Sections 1 and 2 of the Trustee Act (Northern Ireland) 1958(c)

(c) 1958. c. 23.

or of the trust instrument, any income from that property to his parent or otherwise apply it for or towards his maintenance, education, or benefit, the amount of income so paid or applied shall be deemed to be included in the gross income of the parent for the purpose of that paragraph. This proviso shall apply in respect of a person of full age as it applies in respect of an infant, and accordingly the references in the proviso to an infant shall be construed as including references to a person of full age.

Provided also that any dividends or interest paid or credited to the parent by a building society which has entered into arrangements with the Commissioners of Inland Revenue under section 445(1) of the Income Tax Act 1952 shall be deemed to have been received by him after deduction of income tax at the reduced rate determined under those arrangements for the year of assessment in which the dividends or interest are paid or credited; and the amount deemed to have been so deducted shall be treated as part of his gross income.

7.—(1) Gross income for the purpose of Paragraph 6 shall be that of the preceding financial year but, where there has been a sudden and substantial drop in income, current income may be taken into account.

(2) Where the drop in income is less than 20 per cent., assessment on current income shall be made only in exceptional circumstances.

(3) In any cases where current income has been taken into account the contribution shall continue to be determined on current income in each succeeding year.

(4) The deductions allowable from gross income under sub-paragraphs (*a*) and (*b*) of Paragraph 5 shall relate to the academic year in respect of which the award is being assessed.

(5) The deductions allowable from gross income under sub-paragraphs (*c*) to (*f*) of Paragraph 5 shall relate to the preceding financial year unless current income is being taken into account in determining gross income.

(6) Personal income of the scholar for the purpose of Paragraph 2 shall be income accruing during the academic year in respect of which the award is being assessed.

SECOND SCHEDULE

Mature Scholars

1. The provisions of this Schedule shall apply in accordance with Paragraph (1) of Regulation 5 in determining the value of scholarships awarded to mature scholars.

2. For the purpose of this Schedule a mature scholar is:

(*a*) a scholar who has regularly and substantially supported himself out of personal earnings for at least three years before 31st August of the year in which the course begins; or

(*b*) a scholar aged 25 years or over on 31st August of the year in which the course begins; or

(*c*) a woman scholar who was married and is aged 21 or over on 31st August of the year in which the course begins; or

(*d*) a scholar who has for three years before 31st August of the year in which the course begins been in receipt of a Postgraduate Studentship awarded by the Ministry or of a comparable postgraduate award.

3.—(1) The value of a scholarship awarded to a mature scholar for each academic year shall be the maximum allowable amount calculated in accordance with Paragraph 3 of the First Schedule, together with dependants' grant and two homes grant, if any, calculated in accordance with Paragraphs 4 and 5 of this Schedule, the aggregate being reduced by any personal income of the scholar in excess of £100 as determined under Paragraph 2 of the First Schedule:

Provided that—

(i) in the case of a mature scholar payments made by him in pursuance of obligations necessarily incurred by him before the award was offered shall also be disregarded;

(ii) in the case of an award holder who is a woman to whom any payment is due under Paragraph 4(1) and whose marriage has terminated, whether before or during the course, then

(*a*) the amount of personal income to be disregarded shall be £200; or

(*b*) an additional payment of £100 shall be made to her under paragraph 4(1); or

(*c*) in the case of an award holder to whom paragraph 6 applies, an additional payment shall be made to her under that regulation—

whichever is the most favourable to the award holder;

(iii) in the case of a scholar who is a widow the Ministry may also disregard £300 of her income in respect of the first child and £100 in respect of each subsequent child, if this should prove more advantageous to the scholar than claiming dependants' grants.

(2) The standard grant towards term-time and vacation maintenance shall, in the case of a mature scholar who maintains an established home for his dependants, be at the rate otherwise normally applicable to scholars living in lodgings.

(3) Where the benefit from an award as calculated under sub-paragraphs (1) and (2) is less than £50 a minimum grant of £50 shall be payable.

4.—(1) The maximum rates of dependants' grant which may be included in the calculation shall be:—

(*a*) For a spouse or other adult dependant or, in cases of particular hardship, the first dependent child	£210
(*b*) Save as in (*a*) above, for the first dependent child	£90
(*c*) For the second dependent child	£50
(*d*) For the third and subsequent dependent children . . .	£45

(2) The maximum annual rate shall be reduced, pound for pound, by any current income (less income tax, National Insurance contributions and family allowances) of the dependant in respect of whom grant is admitted:

Provided that where the dependant is a wife the first £100 of her income shall be disregarded.

5. A two-homes grant of £75 may be allowed in the calculation where a mature scholar eligible for dependants' grant maintains an established home for his dependants at a place other than that at which he resides during his course.

6. Where a mature scholar has attained the age of 26 years before 31st August of the year in which the course begins and has in each of any three of the six years immediately preceding that year earned a gross income of at least 25 per cent. above the sum of £360 and the maximum payments for which he is eligible under Paragraph 3 of this Schedule exclusive of the basic element of grant as defined by 3(2)(*b*) of the First Schedule then the value thus calculated shall be increased, subject to a maximum of £120, for each year of age by which he exceeds 25 at the same 31st August, by £24.

7. Personal income of a mature scholar for the purpose of Paragraph 3 shall be income accruing during the academic year in respect of which the award is being assessed.

EXPLANATORY NOTE

(This note is not part of the Regulations but is intended to indicate their general purport.)

These Regulations set out the arrangements for the award of scholarships to students admitted to recognised colleges of education, to Education Departments at universities or to other institutions for the training of teachers and provide for increases in the value of such scholarships with effect from 1st September 1968.