



Department  
for Education

# **Incentive programmes for the recruitment and retention of teachers in FE**

## **Literature review**

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**CooperGibson Research**

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## Glossary

**AOC:** Association of Colleges

**BIS:** Department for Business, Innovation and Skills

**CPD:** Continuing Professional Development

**CPI:** College Pay Initiative

**DfE:** Department for Education

**DTTLS:** Diploma to Teach in the Lifelong Learning Sector

**ETF:** Education and Training Foundation

**FE:** Further Education

**GFE:** General Further Education

**HE:** Higher Education

**HEI:** Higher Education Institution

**HEFCE:** Higher Education Funding Council for England

**IFL:** Institute for Learning

**ISC:** Independent Special College

**ITT/ITE:** Initial Teacher Training/Initial Teacher Education

**LSC:** Learning and Skills Council

**LSIS:** Learning and Skills Improvement Service

**NCTL:** National College for Teaching and Leadership

**NQT:** Newly Qualified Teacher

**PRP:** Performance Related Pay

**PSP:** Professional Standards Payments

**QTLS:** Qualified Teacher Learning and Skills

**SEN:** Special Educational Needs

**SET:** Science, Engineering and Technology

**SFC:** Sixth Form College

**SKE:** Subject Knowledge Enhancement

**SLC:** Student Loans Company

**SSSP:** Support Staff Standards Payments

**STEM:** Science, Technology, Engineering and Mathematics

**TES:** Times Educational Supplement

**TPI:** Teaching Pay Initiative

## Executive summary

Recruitment and retention of high-quality teachers is a critical issue across the further education (FE) sector. CooperGibson Research was commissioned to undertake a literature review to help identify which financial and other strategies or incentives – existing or new – would provide the best value for money, and most effectively drive recruitment or retention of good FE teachers. The literature review was supported by a small element of new research to explore the use of recruitment and retention incentives and wider strategies in the FE sector.

The key aims of the research were to;

- Explore what evidence and examples exist about how financial and other incentives have been used in England to encourage new teachers to enter or remain in FE, higher education (HE), and schools and to explore how these are used in other industries and professions.
- Establish their effectiveness for teacher recruitment and retention.
- Explore what evidence exists about recruitment and retention incentives internationally and more generally, the lessons that can be learned and any elements which could be applicable to FE.

## Methodology

The research primarily involved a desk-based review of publicly available literature utilising systematic searches of academic and online libraries, grey literature and websites including government research reports and key organisations.

To supplement the desk research, ten semi-structured telephone interviews were conducted with FE initial teacher education providers, FE awarding and representative organisations and FE colleges.

## Scope of the report

This research has explored the effectiveness of incentives (financial and non-financial) on recruitment and retention in FE and is based on publicly available information. It focused on national incentive programmes, although feedback during telephone discussions also picked up on strategies being implemented locally or regionally.

Additional unpublished evaluation activity may have been undertaken by funding/provider organisations, but this has not come to light during this review or the telephone discussions. Where gaps in evidence were identified, these have been highlighted. It should be noted that feedback from stakeholders was based on a small number of interviews so cannot be deemed as representative of the sector as a whole.

## Key findings

### Evidence from FE incentive programmes

The availability of literature on the impact of incentives on FE recruitment and retention is patchy. Fifteen schemes dating back to 2000 were identified that specifically tackled recruitment and retention in the FE sector – seven are still active<sup>1</sup> and, at the time of this literature review, nine had been evaluated to some extent. The key findings drawn from these evaluations were:

- **Incentive programmes have primarily focussed on the recruitment of teachers into FE ITT, and on pre-employment schemes rather than in-service initiatives.** This indicates that there is a strong opportunity to research and identify good practice in offering in-service initiatives that are directly targeted at retaining recruits in the FE sector. Future programmes may also benefit from longitudinal evaluation that tracks recipients three-to-five years post-completion.
- **Evaluation findings suggest that financial incentives to encourage take up of ITT training have been somewhat successful and are most effective when offered in tandem.** For example, initiatives such as the FE ITT Bursary, Maths Recruitment Incentive and Premium Graduate Scheme were offered simultaneously by providers and perceived to complement one another. This suggests that offering a suite of initiatives may help to increase awareness of the support available to potential candidates, and visibility of the sector as a career option.
- **More robust evaluation activity would ensure good practice in FE recruitment and retention is identified and taken forward for future schemes.** Nine of the fifteen schemes were identified as having been evaluated to some extent. Four currently active schemes were launched in 2017 and thus may be subject to future evaluation<sup>2</sup>. Evaluation activity should be integral to all future programmes, with a framework of success measures confirmed before rollout to ensure appropriate and robust data are collected at critical points throughout delivery (e.g. baseline, mid-delivery, on completion and post-completion tracking) and from all stakeholders (funders, providers, recipients and those that did not complete/progress into teaching).
- **Initiatives have targeted providers/colleges, and potential teaching candidates. However, it was not possible to determine the most cost-effective strategy for recruitment and retention in FE.** Programmes have provided financial incentives direct to individual candidates (e.g. to cover the costs of training), or to providers/colleges. Where funding was provided to the latter, it

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<sup>1</sup> FE Initial Teacher Training Bursary, Maths Subject Knowledge Enhancement Programme, SET for Teaching Success Programme, Retrain and Retain, Further Forces, Pathways to FE Teaching and The STEM Exchange

<sup>2</sup> SET for Teaching Success Programme, Retrain and Retain, Further Forces, Pathways to FE Teaching

appears to have been used to cover the costs of a variety of activities associated with recruitment. However, limitations in data currently available mean that it is not possible to determine which strategies are most effective/offer the best value for money. Future evaluations should therefore include measures that allow for a clear assessment of cost-effectiveness.

## **Evidence from interviews**

Feedback from the ten telephone discussions supplemented the findings of the literature review and offered an indication of current perceptions among stakeholders.

- There was a consensus amongst interviewees that the teaching profession more broadly suffered from a negative image. All held the view that there was a lack of awareness of FE teaching as a potential career and this presented a significant barrier to recruitment. The lack of awareness of FE teaching was seen to be further exacerbated by the higher profile of school-based teaching.
- Linked to the above point, five of the ten interviewees felt that there may be a lack of awareness of bursaries and other incentives amongst potential trainees, due to a lack of advertising.
- All interviewees raised the perceived disparity between FE sector pay and some areas of industry. Five suggested that targeting high achieving graduates specifically was not always effective, as graduates were perceived to be able to achieve significantly higher rates of pay from working in industry.
- Most interviewees believed that a mix of financial incentives, for individuals and providers, would be effective. A flexible funding policy which would allow providers to be more creative in developing recruitment and retention solutions was suggested. Funding for supporting ongoing teacher education and enhanced CPD, mentoring, and a reduction in timetable to support teacher retention in the sector were discussed.

## **Evidence from broader recruitment and retention strategies from education**

- The use of bursaries to encourage trainees into ITT in schools is a well-established incentive. Recent research in the sector points towards the value of increasing incentives for trainees with particular attributes (e.g. qualifications, skills) to attract them into the profession.
- For FE, this model has recently been reflected in ETF's Maths Graduate Recruitment Incentive programme and may be worth further consideration as part of future approaches – particularly for boosting application numbers across priority/shortage subject areas.



- Evidence from the school sector and HE indicates that retention is influenced by a range of non-financial incentives, such as the provision of ongoing support and mentoring (i.e. beyond NQT), opportunities for collaboration, and the opportunity to participate in CPD, as much as it is by levels of remuneration and other financial benefits.

## **Evidence from public sector organisations**

- Research has shown that the impact of financial incentives can be short-term, in that they can help to increase recruitment levels but not longer-term retention rates. This is supported by the evidence emerging from the HE and school sectors.
- Again, as with schools and HE, packages that combine both financial and non-financial incentives appear to be effective in addressing recruitment and retention, with a specific note from wider public sector professions that being able to be flexible and tailor incentives/rewards to individuals was a useful approach. The ability for institutions to offer bespoke incentive packages may be worth considering further in the context of FE, particularly in subject areas where individuals are being recruited from industry.
- It appears that the effectiveness of different incentive types may vary among individuals according to career stage, settings, contexts and experience. The concept of a providing a model whereby providers can be both flexible in approach to incentivisation, and in how they combine types of incentive (financial and non-financial), may therefore warrant further consideration in an FE context.

## **International evidence on teacher recruitment and retention initiatives**

- Drawing from evidence across four countries (Northern USA and Canada, Australia and Germany), a range of financial incentives were identified, such as bonuses for hard-to-fill subjects, loan forgiveness, tuition/loan reimbursement, holiday travel expenses, rural relocation allowances, bursary schemes, and assistance with relocation and housing support. Other approaches include simplifying the teacher qualification process, providing wider support packages (e.g. CPD) and ensuring a 'civil service status' for teachers.
- The majority of incentive packages identified tended to be delivered across both the school and FE sectors; few are tailored specifically to recruitment and retention in FE, suggesting a potential need to promote FE more widely as a sector in its own right with an identity distinct from schools.
- Overall, the literature suggested that financial compensation alone is not a sufficient motivator to encourage teachers to enter or remain in the profession; a combination of both financial incentives and those focused on developing skills and supporting teachers in their role are most effective in recruiting and retaining teachers.

## Conclusions

### Incentives to support recruitment

This review has identified a range of financial incentives in use across education and the broader public sector to encourage the recruitment of individuals into the workplace. There was a consensus across all the evidence that financial incentives are just one of a wide range of strategies employed to maximise recruitment. However, payments to individuals, such as bursaries, can enable those who would otherwise not have been able, to go into teacher training. Across the literature and the telephone discussions, the ability to tailor incentives to meet local need (e.g. gaps in subject areas) was appreciated by providers/colleges.

### Incentives to support retention

There is less evidence related to the use of financial incentives and their impact on retention in-service. Nonetheless, a common theme emerged that non-financial incentives – and particularly the provision of mentoring and support – appear to play a key role in the successful transition from training to teaching, and for continued retention in the sector. Awareness of incentives available to FE teachers already in-service appeared to be limited, suggesting that any activities to support retention need to be promoted widely to ensure positive take-up.

### Delivery and management of incentives

The following common themes occurred across the literature and telephone discussions regarding the delivery and management of incentives:

- **Awareness:** including the need for clear communications about financial incentives to ensure there is no confusion as to eligibility and how they are applied.
- **Simplicity:** simple, clear eligibility criteria without too many restrictions.
- **Targeting:** both in terms of local need and shortage subject areas to maximise impact.
- **Flexibility:** to reflect local demand in teaching provision.
- **Commitment:** funding programmes in two-to-three year cycles to support planning.
- **Timing:** incentives need to be marketed early in the academic year, to ensure that potential candidates are not already enrolled onto other schemes.

## Gaps in evidence

Gaps in the available evidence identified during this literature review commonly refer to the following:

- Evaluations, where they have taken place, have tended to focus on the qualitative perceptions of providers and recipients rather than measuring processes in terms of effectiveness, or identifying good practice.
- Evidence of the longer-term impact of incentive packages (e.g. in terms of encouraging progression from training into teaching itself, or retention in-service) is not available, as recipients do not appear to have been tracked. It is therefore not possible to assess the comparative effectiveness of incentives designed for pre-employment, and those offered in-service.
- Evidence of value for money (including levels of deadweight) is scant and formal measures have not been included within evaluation reports to-date.

These gaps should be addressed wherever possible during future evaluation activity, which should be integral to any future programme design.

## Recommendations

Based on the strongest findings, i.e. where evidence can be drawn from across the literature and telephone interviews, the following recommendations are suggested for future consideration by DfE and partners during the development and delivery of any future incentive programmes (further details are provided in section 7):

- Potential approaches to local supply could be considered. Feedback has suggested that delivering funding at institutional level could be advantageous to recruitment in the sector.
- Evidence suggests that a mix of targeted individual incentives and funding for providers should be utilised. Evidence suggests that a mix of targeted individual incentives and funding for providers should be utilised. Consultations with providers could establish how they can best utilise funding flexibly and innovatively to meet individual needs, but within clear guidelines. The ability to offer bespoke incentive packages may be worth considering further in the context of FE, particularly in subject areas where individuals are being recruited from industry.
- National schemes to support FE teacher retention are limited. Although financial incentives seem to increase applications to teacher training, a holistic approach including both financial and non-financial support is most likely to help to ensure that recruits then progress into the profession from ITE, and stay in it over the longer-term. There is therefore a need to explore how a longer-term in-service strategy could be developed and funded specifically to promote FE teaching and encourage retention.

- To support the success of any future incentive programmes, it is essential that the FE sector, and the opportunities within it, are promoted more widely to the general public as well as at recruitment fairs and across industry sectors.
- Given the patchy nature of published evidence, it is paramount that evaluation activity is an integral part of any future incentive programmes. This activity should include key measures of success and be incorporated into any pilot incentive to ensure that lessons can be learned for national rollout.
- This research included only a small number of qualitative discussions with stakeholders. More in-depth qualitative research may therefore help to identify good and/or innovative practice at a local level, and particularly any differences in need for incentives across subjects and by geographical area.

# 1. Introduction

Recruitment and retention of high-quality teachers is a critical issue across the further education (FE) sector. CooperGibson Research was commissioned to undertake a literature review in order to help identify which financial or other incentives – existing or new – for individuals, providers, or employers, would provide the best value for money, and most effectively drive recruitment or retention of good FE teachers. In addition to financial incentives, the review also encompassed evidence of other strategies used to recruit or retain teachers in FE. The literature review was supported by a small element of new research to explore the use of recruitment and retention incentives and wider strategies in the FE sector.

The key aims of the research were to:

- Explore what evidence and examples exist about how financial and other incentives have been used to encourage new teachers to enter or remain in FE, higher education (HE), and schools and to explore how these are used in other industries and professions.
- Establish the effectiveness of incentives of any type for teacher recruitment and retention.
- Explore what evidence exists about recruitment and retention incentives internationally, the challenges, lessons that can be learned and any elements which could be applicable to FE.
- Identify any lessons from more general recruitment and retention strategies that might be applicable to an FE setting.

## 1.1 Methodology

The review was primarily desk-based.

### 1.1.1 Literature review

Desk research involved systematic searches of academic and online libraries, grey literature and websites including government research reports and key organisations, to identify literature relating to the use of financial and broader packages of incentives in the recruitment and retention of the FE teaching workforce (and examples from the broader public sector).

A search term matrix was developed to enable combinations of keywords and terms that covered (but were not limited to) the following key themes:

- **FE segment:** 'FE college'; 'sixth form'; 'special designated college'; 'post-16'.
- **Workforce:** 'recruitment'; 'retention'; 'shortage'.
- **Incentives:** 'incentive'; 'financial package'; 'quality teaching'.

A brief initial scoping exercise was conducted to inform the development of this matrix, indicating the range, quality, scale and scope of literature/evidence available.

The matrix was used for searches of reports and grey literature published by key organisations operating in the sector, such as: the Department for Education (DfE), Education and Training Foundation (ETF), Further Education Trust for Leadership (FETL), Centre for the Use of Research and Evidence in Education (CUREE), Transforming Lives, Association of Colleges (AoC) and Association for Research in Post-Compulsory Education (ARPCE). Academic databases searched included JSTOR, Wiley Online Library, Taylor and Francis Journals, Directory of Open Access Journals (DOAJ), Web of Science, Google Scholar.

This search culminated in the collation of over 130 documents. These were reviewed for relevance and summaries of key messages relating to the objectives of the research were developed, feeding into a meta-analysis of the findings. A small number of documents were discarded on closer review where they did not relate directly to recruitment or retention or were outside the scope of this review.

### 1.1.2 Scope of the research

Literature was sifted to focus on recruitment and retention and the use of financial incentives in FE in England from 2007 onwards. The date range was selected so that the literature drawn upon was the most relevant and up-to-date. However, if incentive schemes were identified through the search process that began before 2007 but were deemed to be useful, these were included in the review. The review also considered broader recruitment and retention research where examples of initiatives or practice (from HE, schools and broader industry areas) may be transferable to FE.

In addition, the review included a brief search and synopsis of literature identified from government departments and research organisations in four geographical locations. These were selected during the initial scoping exercise where a brief search explored the prevalence of relevant research and any interesting examples that could be followed up as case studies. In discussion with the DfE, the review explored research and publications relating to Australia, Northern USA and Canada, and Germany. This literature was used to develop three short case studies of international experience of recruitment and retention incentives for inclusion in the final report.

This research has explored the effectiveness of incentives (financial and non-financial) on recruitment and retention in FE and is based on publicly available information. It

focused on national incentive programmes, although feedback during telephone discussions also picked up on strategies being implemented locally or regionally.

Additional unpublished evaluation activity may have been undertaken by funding/provider organisations, but this has not come to light during this review or the telephone discussions. Where gaps in evidence were identified, these have been highlighted.

### **1.1.3 Telephone interviews**

To supplement the desk research, ten semi-structured telephone interviews were conducted with FE initial teacher education providers, FE awarding and representative organisations and FE colleges. These explored the nature of current incentives used to recruit and retain teachers, their effectiveness and impact and availability of any evidence around impact, what learning from other sectors could be used to support recruitment and retention of FE teachers and key challenges in recruitment and retention.

Purposive sampling was used to select the interviewees for involvement in the telephone interviews. Due to a lack of evidence and evaluation of incentives, it was deemed beneficial to speak to those that were directly involved in offering financial schemes in FE. The aim of interviewing FE colleges and ITE providers was to explore what was being put in place at an individual provider level to address recruitment and retention issues.

Due to the small sample size, findings from the interviews have been generalised to avoid identification of interviewees. It should be noted that feedback from stakeholders cannot be deemed as representative of the sector as a whole.

## 2. Evidence from UK incentive programmes

Identifying information such as guidance documents or funding criteria for current financial incentives or programmes for recruitment or retention was relatively straightforward. Identifying sources of information about those used in the past was more problematic, particularly where there was no clear evidence that an evaluation was conducted. In some cases, it was difficult to establish when or if a programme had ceased to operate. Furthermore, some appear to have had changes in criteria over time making it difficult to establish if they are the same or a different programme.

Literature which explores the impact of incentives on FE recruitment and retention is sparse. Fifteen schemes specifically aimed at tackling recruitment and retention in the FE sector dating back to 2000 were identified, of which only five were identified as having published evaluation reports. Information on the remaining schemes was in some cases extremely limited, particularly where they only existed for a short period of time.

This section provides a brief description of the schemes identified and key findings from their evaluations, where present. They are grouped to reflect the differing policy contexts at the time of their inception. A table listing all the FE incentive programmes identified, their effective dates and a brief description can be found in section 2.4.

### 2.1 FE incentive programmes: 2000-2007

From September 2001, the requirement that FE teachers hold a recognised teaching qualification became effective, with the aim of raising standards and tackling skills gaps in FE teaching. Incentives during this period were focused on enabling all FE teachers to access the right qualifications and encourage retention in the sector.

#### 2.1.1 Teaching Pay Initiative (2001-2003)<sup>3</sup>

The initiative was designed to facilitate recruitment and retention of good FE teachers by rewarding FE staff who made a significant contribution towards raising standards, in particular college learner retention and achievement. Utilisation of the funding was flexible, in that the way the initiative was implemented by colleges varied according to their individual needs. A variety of schemes operated under the Teaching Pay Initiative (TPI) banner:

- **Teaching Pay Initiative (TPI):** developed by the Association of Colleges (AoC) to reward teaching staff in general FE colleges (GFE), Higher Education Institutions (HEIs) and Independent Specialist Colleges (ISCs). The scheme was designed to

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<sup>3</sup> Gray, M., et al (2003), *Evaluation of the Teaching Pay Initiative in Further Education Sector Colleges*; <http://webarchive.nationalarchives.gov.uk/20130402090908/https://www.education.gov.uk/publications/eOrderingDownload/RR468.pdf>



be flexible to allow colleges to utilise the funding according to their individual needs across the following four elements:

- Criteria based payments – for appropriate teaching and/or professional academic and vocational qualifications.
- Career Structure Payments – for the creation of a clearer career progression for experienced staff via an Advance Practitioner Grade.
- Initiative Payments – for staff recruited into problem or priority areas.
- Modernising Pay Arrangements – for the development of pay strategies based on a national job evaluation scheme.
- **College Pay Initiative (CPI):** for professional development and training for GFE staff to support the delivery and management of effective learning for students. The scheme comprised the same four elements as TPI, modified to support the specific aims of CPI.
- **Professional Standards Payments (PSP):** operated to reward Sixth Form College (SFC) staff. The scheme was implemented in the same way in every SFC with specific eligibility criteria and standards which teachers needed to meet:
  - Effective teaching and the ability to create a learning environment – measured mainly via teaching observation.
  - Professional characteristics – demonstration of their commitment to teaching via actively participating in and supporting all of the processes of an effective college.
  - Effective learning (achievement and retention) – demonstrating that their teaching enabled students to achieve well, relative to their prior achievement.
- **Support Staff Standards Payments (SSSP):** rewarded SFC Support Staff for their skill, knowledge and commitment. The scheme was implemented in the same way in all SFCs. Staff were required to have a satisfactory appraisal record in their current college with a checklist of areas for consideration in addition to their normal appraisal (agreed by the National Joint Council).<sup>4</sup>

A small qualitative piece of research was conducted by the AoC reviewing the implementation of the scheme,<sup>5</sup> followed by a slightly larger qualitative study with 13 participating organisations for the Department for Education and Skills (DfES) in 2003. The DfES report acknowledged that the initiative had addressed to an extent some of the pay issues in FE, such as pay competitiveness, pay progression and pay differentials versus the schools sector, but that more work was required to address the ‘underlying problem of pay inequality between FE and schools’ (the report did not highlight what this

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<sup>4</sup> Ibid., pp.30-31

<sup>5</sup> Ibid., p.3

additional 'work' should entail).<sup>6</sup> TPI was also perceived as a reward and recognition for achievement.<sup>7</sup>

However, the report identified that any positive impact on morale of TPI was often undermined by introduction and administration issues, such as poor communication of the scheme to staff and a lack of clarity around how the amount allocated to institutions had been decided upon.<sup>8</sup> Furthermore, the impact on recruitment and retention difficulties experienced by colleges participating in the research was mixed. Some colleges reported a positive impact whilst others reported a negative impact (total numbers reporting each were not made clear in the report itself). As examples, two SFCs mentioned the payments during an interview and one felt that the candidate had accepted the role as a result. One GFE college reported a notable improvement in recruitment and retention and another reported increased commitment to stay from staff. However, another GFE college reported no impact of TPI on recruitment and retention and two GFE colleges felt the impact was negative due to the increased mobility of staff. Another GFE college reported continued problems with attracting specialist tutors, but had seen an improvement in attracting second-career teachers.<sup>9</sup> At the time of the evaluation, little evidence of impact on teacher behaviour or student performance was identified<sup>10</sup>.

A key learning from the research was that communication was a key influencing factor in the success of TPI. Where time was invested in communicating TPI to staff, this had a positive influence on outcomes, such as improved staff morale, increased number of staff pursuing development and positive perceptions of staff development in colleges. In colleges where communication of the scheme was less comprehensive, issues arose such as lack of staff understanding of the purpose and significance of payments, rumours amongst staff and cynicism of the scheme.<sup>11</sup> Due to its relatively small sample size and qualitative nature, the report acknowledged that the findings may not be representative.<sup>12</sup>

TPI ceased to exist in 2003, when it was consolidated into colleges' core funding.

### **2.1.2 FE (Post 16) Initial Teacher Education Bursary (2000-2010)<sup>13</sup>**

Further Education Initial Teacher Training Bursaries (FE ITT) were one of a number of initiatives designed to contribute to the Government's 'Success for All' strategy. Teaching qualifications were mandatory for all teachers in FE and schools, and HE fees had been introduced in 1998. Therefore, the scheme was designed to support entrance to the FE

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<sup>6</sup> Ibid., p.4

<sup>7</sup> Ibid., p.28

<sup>8</sup> Ibid., p.17

<sup>9</sup> Ibid., pp.8-9

<sup>10</sup> Ibid., p.2

<sup>11</sup> Ibid., p.28

<sup>12</sup> Ibid., p.2

<sup>13</sup> DfE (2009), *Further Education Initial Teacher Training Bursaries (Post 16) Scheme 2009/10 Guidance for Institutions*

teaching profession by providing a contribution towards the costs of obtaining a teaching qualification. The bursaries were initially introduced as a one-year pilot in 2000-2001, with the aim of encouraging high calibre graduates into the FE sector by aligning with the primary and secondary teacher training bursary and removing the disparity between the cost of qualifying to teach in FE and the cost of qualifying to teach in schools.

During the pilot phase, all students training to teach in FE were eligible for the bursary of up to £6,000, paid monthly in arrears.<sup>14</sup> The scheme was rolled out nationally in 2006 and during its lifetime was adapted to focus on specified shortage subjects based on changes in policy and analysis of sector need. By 2010, the scheme offered bursary payments of up to £9,000 for students undertaking specified FE teaching qualifications in priority subject areas of mathematics, Skills for Life – numeracy, science and construction, and up to £6,000 for a number of secondary subjects.<sup>15</sup>

An evaluation of the pilot scheme was published in 2004 by DfES.<sup>16</sup> The evaluation included analysis of quantitative student monitoring data requested by the Higher Education Funding Council (HEFCE) from participating institutions, case studies with ten institutions utilising the bursary, in-depth telephone interviews with all remaining institutions utilising the bursary and a postal survey sent to all bursary recipients during the first three years of the pilot (2000-2003). However, apart from the HEFCE data, analysis was based on feedback after the programme's inception and no other point of comparison, such as a control sample, was used. As a result, whilst the research was indicative of the potential impact of the scheme, no causal relationship could be assumed. Although a sample of 800 responses from bursary recipients was achieved, the report does not state the total number of bursary recipients or the number invited to participate in the survey. The report does note that in 2002-2003, around 1,700 bursaries were available at 23 institutions.<sup>17</sup> However, due to the lack of full data it is not possible to ascertain the proportion of total recipients that the findings represent: feedback was based on self-selecting respondents, meaning that the findings could potentially be biased, positively or negatively, and may not accurately represent the total bursary recipient population.

Overall however, the initiative appears to have had a positive impact in some areas. The report identified an increase in applications for FE ITT from 3,669 in 2000-2001 to 5,596 in 2002-2003.<sup>18</sup> Seventy percent of the 800 bursary recipients responding to the postal survey said they would not have applied for teacher training without the financial support provided by the bursary. Institutions reported an increase in demand and as a result were

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<sup>14</sup> DfES (2004), *Evaluation of Further Education Initial Teacher Training Bursary Initiative*, p.10

<sup>15</sup> Eligible secondary subjects in 2009/2010 were Information and Communications Technology, English, Media Studies and Performing Arts, Design and Technology, Engineering, Skills for Life – Literacy & ESOL, Business Administration, and Health, Social Care and Public Services

<sup>16</sup> DfES (2004), *Evaluation of Further Education Initial Teacher Training Bursary Initiative*

<sup>17</sup> *Ibid.*, p.15

<sup>18</sup> *Ibid.*, p.16

able to increase the number of available ITT places. Fourteen institutions who were not previously offering a full-time course reported that they were able to do so as a result of the bursary scheme.<sup>19</sup> The report also claimed that the bursary widened participation amongst women, particularly those in their mid-thirties and career changers.<sup>20</sup> It was noted in the report that 65% of all bursary recipients were female, however this should be treated with caution as no data were provided in order to compare with entrants not receiving the bursary.<sup>21</sup>

The evaluation identified that after the bursary was introduced, all except two institutions reported reduced dropout rates and in-training retention was high, with 94% of survey respondents completing their course. Half of students surveyed agreed that the bursary had helped their academic performance as it reduced their stress levels and allowed them to focus on their course rather than having to combine it with part-time work. The report concludes that although it was not possible to attribute a causal impact of the bursary on course completion, there was a positive link between the recruitment, in-training retention and completion themes identified.<sup>22</sup>

However, the research also found some areas where impact was less clear. There was no evidence that the bursary had an impact on institutional 'recruitment practices' (although this had not been an objective of the bursary)<sup>23</sup> or the calibre of students being recruited.<sup>24</sup> Nor did it appear to affect the ethnic diversity of recruits (although ethnic minorities were noted as being 'well-represented' within the cohort).<sup>25</sup> Furthermore, institutions that experienced difficulty with recruitment for shortage subjects reported no impact of the bursary on recruitment in those areas. Conversely, there was evidence of 'a flood of applications' for non-shortage subjects (social sciences, humanities and arts), which resulted in teachers of these subjects struggling to secure teaching posts after completing their course.<sup>26</sup> Of 230 survey respondents not in a teaching post, 47% (108) said that this was because they could not find a suitable teaching post – 'most' of those not able to find a teaching post were in non-shortage subjects (although a specific breakdown of respondents by subject was not provided in the report).<sup>27</sup>

Subsequently, the report identified that the recruitment of students did not necessarily reflect local demand for subject specialist teachers, but more the availability of ITT placements and as a result recommended that future development of the bursary should take into account the gaps in provision in the FE sector.<sup>28</sup> In response, the scheme was

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<sup>19</sup> Ibid., p.2

<sup>20</sup> Ibid., p.3.

<sup>21</sup> Ibid., p.57-58

<sup>22</sup> Ibid., p.4

<sup>23</sup> Details of what was defined as 'recruitment practices' are not provided in the report. Ibid., p.3

<sup>24</sup> Ibid., p.3

<sup>25</sup> Ibid.

<sup>26</sup> Ibid., p.35

<sup>27</sup> Ibid, p.43

<sup>28</sup> Ibid., pp.3-4

subsequently reviewed and eligibility for the bursary targeted to specified shortage subjects. The report also suggested that shortage subject areas could benefit from the development of a 'fast track' to FE teaching, with faster career advancement and a more substantial salary package.<sup>29</sup> The bursary scheme appears to have been funded until 2010.

### 2.1.3 FE Golden Hellos (2002-2010)<sup>30</sup>

Golden Hellos were introduced in 2002 as part of the government's 'Success for All' strategy to reform FE and training in England. They aimed to address differences in pay levels for FE teachers compared to the schools sector, increasing the attractiveness of teaching in FE and addressing the perceived migration of FE teachers to the schools sector. The 2002 scheme was administered by the Learning Skills Council (LSC) and comprised one-off payments to new FE teachers of up to £4,000 in the second year of teaching in a number of designated shortage subjects. The scheme continued until 2010, with a review of eligible subjects conducted each academic year to align with sector need.

An early impact evaluation of the scheme was published in 2004.<sup>31</sup> The evaluation included preliminary desk research and telephone consultations with ten local LSCs, ten in-depth case studies from FE institutions, and analysis of a postal survey of Golden Hello recipients that achieved a 40% response rate (although the sample size is not clear). The research did not include any point of comparison such as a control. As a result, it is difficult to confirm the robustness of this research.

The report found that take up was high and exceeded expectations in the 2003-2004 financial year.<sup>32</sup> However, take up was uneven in that some geographic areas and subjects saw an increase whereas others saw a decline, leading to questions as to the extent to which the scheme reflected sector need.<sup>33</sup> Furthermore, a number of eligibility issues were identified, such as unclear definitions of shortage subject areas, and the exclusion of those with prior teaching experience was questioned by some.<sup>34</sup>

Whilst it was too early to assess effect and impact, the report identified some evidence of positive effects on recipients, including reports of teachers feeling more valued (54%)<sup>35</sup> and more motivated (30%).<sup>36</sup> There was also evidence of some increased recruitment (10% said the payments had influenced them to work within FE) and retention (31% said

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<sup>29</sup> Ibid., p.49

<sup>30</sup> Hopwood, V. (2004), *Evaluation of the Golden Hello Initiative*

<sup>31</sup> Ibid.

<sup>32</sup> Ibid., p.iii

<sup>33</sup> Ibid., pp.11-17

<sup>34</sup> Ibid., p.58

<sup>35</sup> Ibid., p.18

<sup>36</sup> Ibid., p.19

that the payments had influenced them to stay working in FE).<sup>37</sup> Qualitatively, some colleges reported an impact on the speed of enrolment.<sup>38</sup> However, the research also identified that the restrictive eligibility criteria could be perceived to be divisive. For example, it was found that colleges interpreted the eligibility criteria differently resulting in inconsistencies in approvals and leaving applicants unclear as to the reasons why.<sup>39</sup> Payments were seen by recipients as insufficient to affect long term behaviour and other factors such as job satisfaction/enjoyment, workload and pay were perceived to have more influence.<sup>40</sup> Furthermore, the report suggested that there was a significant degree of deadweight associated with the scheme (payments to teachers who would have remained in FE, or left FE, anyway).<sup>41</sup> The report concluded that it was not possible at that stage to 'definitively and quantifiably comment on effect and impact' due to lack of clarity of the initiative's intentions, no baseline data, variations in shortage subjects at a local level and it being too early in the life of the programme to evidence an impact on recruitment.<sup>42</sup> Whilst the scheme continued until 2010, no evidence of any further evaluation of the scheme was found.

## 2.2 FE incentive programmes: 2007-2013

FE teacher training qualifications continued to be mandated and regulated. In 2007 and 2011, further reform for FE teaching qualifications was introduced, with a focus on ensuring compliance with the mandated requirements. Incentives introduced during this period aimed to address issues of increasing costs for teachers undertaking the required training.

### Continued incentive programmes from 2000-2007 period

*FE (Post 16) Initial Teacher Education Bursary (2000-2010)*

*FE Golden Hellos (2002-2010)*

### 2.2.1 Initial Teacher Training Grant (2010-2013)<sup>43</sup>

The Initial Teacher Training Grant was introduced in the 2010-2011 academic year and was a flat-rate non-means tested Fee Grant for FE providers of £400 to offset the costs of ITT for teachers, tutors and trainers undertaking part time, in-service, study for the Diploma to Teach in the Lifelong Learning Sector (DTTLS) qualification. The grant aimed to provide a contribution to the costs of training due to the requirement to pay fees for all

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<sup>37</sup> Ibid., p.28

<sup>38</sup> Ibid., p.23

<sup>39</sup> Ibid., p.44

<sup>40</sup> Ibid., p.32

<sup>41</sup> Ibid., p.34

<sup>42</sup> Ibid., p.60

<sup>43</sup> National Association of Teaching English and Community Languages to Adults (NATECLA) (2010); <http://www.natecla.org.uk/news/513/ITT-grant-confirmation>

FE teachers following the cessation of the FE (Post 16) Initial Teacher Education Bursary in 2010. From 2012, the scheme was available alongside the Initial Teacher Training Fee Awards (below), enabling part-time students to receive an additional payment in year two of their qualification. The grant was administered by the Institute for Learning (IfL) on behalf of Department for Business, Innovation and Skills (BIS). The scheme appears to have been available until Learning and Skills Improvement Service (LSIS) closed in 2013. An evaluation of the scheme was not identified.

### **2.2.2 Initial Teacher Training Fee Awards (2012-2013)<sup>44</sup>**

At the time of the scheme's introduction, the Department for Business, Innovation and Skills was in the process of transitioning to new regulations for FE teachers. Additionally, increased fees for HE qualifications had been introduced. Therefore, the Initial Teacher Training Fee Awards scheme was introduced as an interim measure to support teachers already undertaking qualifications to meet these increased costs.

The scheme offered award payments of £1,500 to institutions towards the fees for training for basic skills teachers in mathematics or English, or £1,000 for all other subjects. The scheme had a budget of £11.5 million and aimed to support up to 11,000 learners starting teacher training in the 2012-2013 academic year and was offered alongside the Initial Teacher Training Grant (see below). The scheme was administered by the Institute for Learning (IfL) on behalf of Department for Business, Innovation and Skills (BIS).

There is no further information about the scheme and it appears to have only been in effect for the academic year 2012-2013 due to the closure of LSIS in 2013.<sup>45</sup> No scheme evaluation was identified.

## **2.3 FE incentive programmes: 2013 – present**

From September 2013, FE teachers were no longer required to work towards qualified teacher learning and skills (QTLS) status, with the expectation that individual teachers and employers would access training and qualifications as needed. Through the FE Workforce Strategy (2014), government policy focused on English, mathematics and special educational needs (SEN). The move away from regulation led to a focus on collaboration with the FE sector to raise standards and meet sector challenges. Incentive programmes have often been short-term funded in the first instance, via collaborative programmes with the sector to tackle specific issues. These programmes were:

- *FE Initial Teacher Training (ITT) Bursary*

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<sup>44</sup> Summers, N. (16 July 2012), *LSIS launches new support scheme for trainee teachers*, FE Week; <https://feweek.co.uk/2012/07/16/lsis-launch-new-support-scheme-for-itt/>

<sup>45</sup> Education Centres Association (2003); *LSIS Funding to Cease*; <http://www.e-c-a.ac.uk/news/169/>

- *Mathematics Subject Knowledge Enhancement (SKE) programme*
- *Maths teacher Golden Hello programme*
- *ETF Programmes including the Maths Graduate Recruitment Incentive Award and Premium Graduate Scheme*

An evaluation of the impact of the FE Workforce Programme, including these incentive programmes, was carried out on behalf of BIS in 2016.<sup>46</sup> Just over 200 recipients and 30 providers were surveyed across the different programmes. The findings relevant to the specific schemes are presented in the following sections.

### **2.3.1 FE Initial Teacher Training (ITT) Bursary (2013-present)<sup>47</sup>**

The FE ITT Bursary aimed to attract ‘high-quality’ graduates as English or mathematics teachers in the FE sector.<sup>48</sup> The scheme was administered by the National College for Teaching and Leadership (NCTL).<sup>49</sup> It was introduced in response to post-16 education reforms effective from 2014, where any students who do not achieve a Grade C (now level 4) or above in English and/or mathematics GCSE by age 16 must continue to work towards achieving these qualifications, or an approved interim qualification, as a condition of their place being funded.<sup>50</sup> A similar scheme in terms of the funding provided is available for the schools sector, which awards bursaries based on the subject that trainees wish to teach across a wider range of subjects.<sup>51</sup>

At its inception in 2013, the FE ITT Bursary was awarded on a sliding scale based on prior academic achievement, with recipients who achieved a first class degree in mathematics receiving the largest award to maintain parity with the schools sector bursary and address the anticipated greater challenges in recruiting mathematics teachers.<sup>52</sup> The scheme also included those specialising in SEN for a period limited from 2013-2016, after which additional support became available via ETF.<sup>53</sup> For the academic year 2017/18 bursaries of £25,000 were available for mathematics and £9,000 for English. Funding is limited each year and allocated on a ‘first come first served’ basis, with mathematics having priority over English should demand exceed funding limits.

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<sup>46</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished)

<sup>47</sup> DfE (2018), *Further education initial teacher training - Mathematics and English programme bursary guide: academic year 2018/19*

<sup>48</sup> *Ibid.*, p.4

<sup>49</sup> NCTL is due for closure from the end of April 2018 and its functions will be incorporated into DfE

<sup>50</sup> BIS and DfE (2 July 2014), *Written statement to Parliament: Maths and English provision in post-16 education*

<sup>51</sup> DfE and NCTL (2017), *Funding: initial teacher training (ITT), academic year 2018 to 19*

<sup>52</sup> ETF (2013), *Further Education Initial Teacher Training Bursary: A Guide for Applicants*

<sup>53</sup> DfE (2017), *Further education initial teacher training: Mathematics and English language bursary guide academic year 2017 to 2018*



A 2016 evaluation of the programme<sup>54</sup> reported that the bursary had had a 'significant impact in increasing the number of individuals training to enter the FE sector'.<sup>55</sup> Nearly all providers (ITE and FE) agreed a bursary scheme was needed to encourage recruitment of maths and English teachers, however it was felt that the target group of recipients benefiting would be 'relatively small'.<sup>56</sup>

'The general consensus was that the bursary scheme was unlikely to attract individuals that who would prefer to teach at schools, as these candidates could attract similar bursary for schools ITE schemes. Hence, there is no added incentive for enrolling on an FE ITE programme. In addition, ITE and FE providers generally believed that it was unlikely to have a major effect on attracting high-performing recent graduates, who have opportunities to apply for jobs in areas such as finance and accountancy, which command a far higher starting salary than FE'.<sup>57</sup>

This was echoed during the interviews with providers carried out as part of this literature review (see section 3). Instead the greatest impact of the bursary was perceived by providers to be among those put-off training due to the cost of fees and living expenses.<sup>58</sup>

In terms of delivery, the evaluation identified that as general awareness of the bursary scheme increased, so too did the number of applications and recruits (supported by 21% of 101 recipients surveyed stating that they heard of the bursary by word of mouth).<sup>59</sup> Promotional activities by providers included advertising in local newspapers, through their own websites and prospectuses and targeting marketing materials to maths and English degree students.<sup>60</sup>

'In the first year of roll out (2013/14), the bursary had a limited impact on increasing ITE enrolments, largely because by the time the funding was committed, ITE providers had little opportunity to promote it. However, since then, the number of bursary awards has doubled, suggesting the programme is having an effect on increasing enrolments on ITE courses'.<sup>61</sup>

Indeed, over half of bursary recipients surveyed (53% of 101) said that they would not have undertaken the course without the incentive – and this was particularly the case among maths trainees.

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<sup>54</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished)

<sup>55</sup> *Ibid.*, p.68

<sup>56</sup> *Ibid.*, p.51

<sup>57</sup> *Ibid.*

<sup>58</sup> *Ibid.*, p.52

<sup>59</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished), p.55

<sup>60</sup> *Ibid.*, p.11

<sup>61</sup> *Ibid.*, p.10

'Most bursary schemes generally have a high level of deadweight, as it is difficult to only target trainees that would not otherwise have accessed a programme. Therefore, this proportion of participants enrolling on the ITE course because of the bursary is higher than might be expected'.<sup>62</sup>

The findings from recipients should be noted with some caution (and the evaluation flags this point).<sup>63</sup> The 101 survey responses represented a small proportion of recipients: approximately 14% of bursary recipients in 2014 and 2015 (and 8% of the 1,136 total); furthermore, there was a fairly large confidence interval of +/- 9% on their responses. Recipients from 2015 were overrepresented compared to earlier years of the scheme (93% were from recipients enrolling in 2015), as too were maths bursary recipients, who accounted 'for 48% of responses but only 28% of bursary recipients'.<sup>64</sup>

Nonetheless, the feedback gathered from FE and ITE providers and trainees, alongside the increase in take-up during the second and third years of the scheme, does indicate some causal relationship between the incentive and recruitment into pre-employment training for FE teaching. However, it was not possible to assess the impact of the incentive on recruitment into teaching itself, or longer-term retention of teachers once in post, as bursary recipients were not tracked as part of the evaluation.

### **2.3.2 Subject Knowledge Enhancement (SKE) Programme for Mathematics (2016-present)**<sup>65</sup>

SKE programmes are aimed at highly qualified graduates applying for ITT who have the potential to become outstanding teachers but who do not have enough specific subject knowledge to begin a subject-related ITT course. The incentive is designed to complement the FE ITT Bursary (above) in stimulating pre-service graduate recruitment to fulfil the increased demand for mathematics teachers in FE. The current funding scheme is aimed at attracting potential mathematics teachers through fully-funded SKE mathematics programmes. The programmes are funded by DfE and were initially managed by NCTL. Funding of up to £4,605 is currently provided for courses which enable trainees to teach mathematics to GCSE and level 3 in either schools or FE, although budget is limited. Although applicants to SKE are not eligible for Student Loans Company (SLC) support, those who meet SLC conditions can claim a bursary of £200 per week, up to £4,000.

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<sup>62</sup> Ibid., p.62

<sup>63</sup> Ibid., p.68

<sup>64</sup> Ibid., p.87

<sup>65</sup> DfE (2017), *Further education initial teacher training Mathematics subject knowledge enhancement (SKE) programme guide academic year 2017/18*

The evaluation for BIS (2016) identified challenges in the provision of SKE courses, particularly:<sup>66</sup>

- **Recruiting sufficient numbers of trainees:** in order to ensure provision was financially viable, an SKE course was perceived by providers to require ten to 15 attendees, but each had identified a maximum of 4 trainees who would benefit.
- **Timetabling:** recruitment onto ITE can occur up to two weeks prior to a course starting, leaving little time for individuals to also join an SKE course; running the two courses concurrently also created challenges for some providers where it was felt to create workload issues for trainees.
- **Resources:** SKE courses require cooperation from the provider's maths departments; in institutions where teaching resources are at capacity, this can make SKE delivery impossible.

Around half of bursary recipients participating in the BIS (2016) evaluation had undertaken SKE training. Two-thirds of respondents who undertook an SKE course reported a significant impact on their confidence to teach GCSEs or higher – however there was no data related to the impact of the course on recruitment or retention into FE more broadly.<sup>67</sup>

In addition, an evaluation of the SKE programme for graduates proceeding onto a PGCE or for Qualified Teacher Status for schools (not FE) was conducted between 2009 and 2012, with a final report published in 2013.<sup>68</sup> This evaluation gathered qualitative perceptions of the course from trainees and providers and tracked recipients into their NQT<sup>69</sup> year. It found that SKE courses were effective in preparing teacher trainees sufficiently with the specialist subject knowledge they require to teach a subject in schools.<sup>70</sup> The report made a number of recommendations to further enhance the delivery and quality of SKE courses, which may be helpful in considering the delivery of the courses to FE trainees. These included working with providers to ensure the content and structure of such courses is appropriate and consistent, supporting teachers once in post to further enhance their subject knowledge and confidence to teach to the required levels, and encouraging SKE providers to work collaboratively with other local SKE providers to ensure students are recruited to the most appropriate course.<sup>71</sup>

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<sup>66</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished), p.52

<sup>67</sup> *Ibid.*, p.60

<sup>68</sup> Gibson, S., O'Toole, G., Dennison, M. and Oliver, L. (2013), *Evaluation of Subject Knowledge Enhancement Courses: Annual Report 2011-12*

<sup>69</sup> Newly qualified teacher

<sup>70</sup> *Ibid.*, p.71

<sup>71</sup> *Ibid.*, pp.16-17

### 2.3.3 Maths Golden Hellos (2014-2015)<sup>72</sup>

A Golden Hellos scheme was announced in 2014 targeted at recruiting new specialist mathematics teachers and was launched alongside the ETF Maths Graduate Recruitment Incentive Award (below). Under the scheme, graduates choosing to teach in the FE sector received a bonus of £7,500, rising to £10,000 for those who trained to support learners with special educational needs (SEN). The award was payable after completion of the second year of employment 'for graduates who are newly qualified teachers and have undertaken a mathematics ITT programme allowing them to teach in FE'.<sup>73</sup>

The BIS (2016) evaluation identified a 'mixed awareness' of the programme among ITE and FE providers, although those with a good understanding 'generally believed it provided some benefits in encouraging trainee teachers to apply to teach GCSEs'.<sup>74</sup> Nonetheless, there was less certainty that recent ITE graduates would benefit from the scheme as they reported that most new teachers in FE will start by 'predominantly delivering functional skills'.<sup>75</sup>

However, respondents to the evaluation survey showed limited awareness of the Golden Hello scheme.

'Only 6% of survey respondents stated they were aware of the Golden Hello scheme before they enrolled on their ITE course. None of these learners stated that the Golden Hello scheme had a notable influence on their decision to enrol on their ITE course'.<sup>76</sup>

Consequently, the scheme appears to have had little impact on encouraging entrants to the sector (at March 2015, eight of the 204 learners responding to the evaluation surveys had applied for a Golden Hello).<sup>77</sup>

### 2.3.4 ETF Maths Graduate Recruitment Incentive Award (2014-2015)<sup>78</sup>

The scheme was a time-limited programme in response to feedback from the sector on the challenges of recruiting and retaining prime mathematics teachers. The scheme was commissioned by ETF in 2014 and delivered by Tribal Education Ltd. Awards of £20,000 (or £30,000 for organisations working in partnership) were given to FE and skills organisations to enable them to explore new ways of recruiting and retaining specialist graduate mathematics teachers. The scheme aimed to encourage innovation in

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<sup>72</sup> BIS (2014), *Mathematics Teachers Golden Hello Scheme*

<sup>73</sup> *Ibid.*, p.4

<sup>74</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished), p.52

<sup>75</sup> *Ibid.*

<sup>76</sup> *Ibid.*, p.63

<sup>77</sup> *Ibid.*, p.10

<sup>78</sup> ETF (2016), *Maths Graduate Recruitment Incentive Award: Final Report*

recruitment and retention practices for a shortage subject and improve standards in mathematics teaching in the FE sector.

An evaluation of the scheme was published by ETF in 2016. In total, 220 awards were granted across three phases, equating to a cost of just less than £23,140 per recruit.<sup>79</sup>

**Table 1: Total number and value of approved applications to ETF Maths Graduate Recruitment Incentive Award**

	<b>Number of applications approved (all 3 phases)</b>	<b>Value of applications approved (all 3 phases)</b>
£20,000 awards	165	£3,300,000
£30,000 awards	54	£1,620,000
£170,000 awards	1	£170,000
<b>TOTAL</b>	<b>220</b>	<b>£5,090,000</b>

(Source: ETF, 2016; p.12)

All except 14 organisations were able to recruit at least one new mathematics teacher.<sup>80</sup>

The report found that participating organisations utilised the funding for a range of recruitment and retention strategies. Almost all participating organisations (92%) offered some level of incentive to the graduates and many offered a combination of incentives to provide an enhanced overall package. The most common incentives offered were mentoring (88%), access to ITT (86%) and reduced teaching hours (62%). Some organisations offered financial incentives, the most common being enhanced salaries (45 organisations) or bonus payments (27 organisations).<sup>81</sup>

This was also reflected in a separate evaluation for BIS (2016), which reported that providers felt the main benefit of the incentive ‘was its flexibility. The scheme allowed providers to propose activities that met their needs. Consequently, it could be used to complement the other recruitment activities’.<sup>82</sup>

ETF’s research reported the scheme as being successful: 96% (206 out of 220) of the organisations awarded recruited at least one new mathematics teacher, resulting in 280 new mathematics teachers working in the FE and skills sector.<sup>83</sup> The research also reported a perceived positive impact on the organisations’ mathematics strategies, raised profile of mathematics in their organisation, raised awareness of teaching mathematics in the FE and skills sector and improved human resources and recruitment processes. The

<sup>79</sup> Ibid., p.12

<sup>80</sup> Ibid., p.4

<sup>81</sup> Ibid., p.32

<sup>82</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished), p.53

<sup>83</sup> ETF (2016), *Maths Graduate Recruitment Incentive Award: Final Report*, p.4

evaluation suggested that combining funding sources to provide a range of incentives helps with the success of recruitment and where funds were used to support enhanced terms and conditions, such as reduced teaching hours and a competitive or enhanced salary, recruitment and retention seemed to have been successful. However, no control or point of comparison was made to establish causality and therefore it is not clear whether the participating institutions would have been able to recruit a mathematics teacher without the programme. This being said, the evaluation for BIS (2016) did note evidence that, when run in tandem with other schemes, the incentive was an effective recruitment tool.

‘The maths recruitment incentive has complemented the bursary scheme and encouraged more new maths and English teachers to come into the sector... most providers that received funding from the recruitment incentive had used it to deliver activities that were felt to be effective in recruiting new maths and English teachers’.<sup>84</sup>

The activities perceived to be effective in recruiting maths and English teachers had included targeting promotional materials locally and regionally to focus on recent graduates in these subjects; offering financial incentives such as increased starting salaries; the provision of internal CPD for the development of subject knowledge (separately to SKE courses).<sup>85</sup> These additional activities were felt to have attracted individuals ineligible for the bursary, such as those that had previously been teachers in the schools sector or those without higher level qualifications in maths and English. Thus, the offer of the bursary alongside the recruitment incentive appeared to have been an effective and complementary approach to recruitment for some providers.

A number of recommendations for the recruitment incentive scheme were made by ETF for any future version:<sup>86</sup>

- The timing of the scheme impacted on success, therefore awards (of £20,000 or £30,000 as detailed above) should be distributed to providers early in the academic year to help to ensure the recruitment of prospective candidates before they enrol onto other schemes.
- Early opportunities for award recipients (i.e. providers) to meet with the funding organisation would enable discussion of concerns and issues related to the effective facilitation of the award (and help create dialogue with other providers in receipt of funding to share ideas/support for changing recruitment practices).
- Dialogue between the senior management team and finance departments from across the recipient organisation is critical to ensure any changes to provider recruitment and retention practices are effective during the facilitation of the award.

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<sup>84</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished), p.72

<sup>85</sup> Ibid.

<sup>86</sup> ETF (2016), *Maths Graduate Recruitment Incentive Award: Final Report*, p.5

- For shortage subjects, it is essential at the beginning of the recruitment process to ensure there is an effective dialogue in the recipient organisation between the curriculum area and human resources so that their different needs are recognised.
- Effective induction (into the FE teaching role by the recruiting institution) and mentoring programmes for graduates are essential for their successful recruitment and retention in employment.
- Providers should be encouraged to share good practice and support the development of mathematics teaching in the sector.

At the time of the report, it was not possible to establish whether the scheme had a longer-term effect in terms of retaining teachers in FE, however ETF are currently undertaking a more in-depth evaluation of the programme looking at retention and impact on providers, graduates and learners, due for publication later this year (2018).

### 2.3.5 ETF programmes

A number of programmes, funded through ETF, have been introduced since 2014, to build upon their ability to work closely and effectively with the FE sector. The programmes are designed to respond to sector needs, in particular the need for science, technology, engineering and mathematics (STEM) teachers, and drive improvements in the quality of teachers and training.

#### **The STEM Alliance STEM Improvement Programme (2014-2015)**<sup>87</sup>

In 2014, ETF commissioned and funded Senta, The Science, Engineering and Manufacturing Technologies Alliance, to deliver a programme specifically aimed at tackling the recruitment and retention of STEM teachers and tutors and increasing the supply of STEM teachers by encouraging its consideration as a career, to address current and future sector needs. The programme worked to develop a higher level of competence, confidence and collaboration in the existing STEM teaching and training workforce and to develop opportunities to share resources and knowledge transfer within the FE and training sector.

The programme included a wide range of initiatives:

- Share workshops: for practitioners and providers to encourage teachers, tutors and trainers to share best practice and STEM teaching resources. The workshops included learner forums and ‘Time to Talk’ cafés attended by apprentices and learners.
- Resources bank: developed to provide online access to a bank of effective transferable practice and resources for STEM delivery, accessed via the ETF’s Excellence Gateway.

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<sup>87</sup> The STEM Alliance (2016), *STEM Improvement Programme Evaluation Report*

- STEM tutor recruitment support: to encourage students to consider a career in STEM teaching via a range of careers events, national recruitment campaigns and participation in The Skills Show (the UK's largest national careers event) and engagement with the AoC through a dedicated STEM vacancy website to help fill FE STEM vacancies.
- Recruitment and retention guide: aimed at supporting heads of department and human resources professionals to successfully recruit and retain talented STEM teachers, available via a bespoke online STEM Engage website. The site includes a range of resources such as case studies, videos, reports and tools.
- Employer register: an online service (The STEM Exchange) matching teachers, college tutors, private training providers and charities involved in FE with employers in their area who agreed to support professional development activities.
- Trailblazer provider briefing workshops: to enable providers in the sector to keep informed about sector policy changes and developments in standards and delivery.
- Public relations and marketing: to support the programme and engage with providers, employers and other key stakeholders via a full communications strategy including branding, social media channel creation, dedicated website pages and STEM Newsletters.<sup>88</sup>

An evaluation of the programme reported on the achievements and reach of the programme. Overall the programme appears to have been successful in raising the profile of STEM and FE teaching, reaching a large number of practitioners, providers and learners.<sup>89</sup> Although a survey conducted with Share workshop participants indicated high levels of satisfaction (85%), it is not clear from the report how many of the 820 participants were surveyed.<sup>90</sup> A legacy of the programme is evident in the continued provision of elements such as The STEM Exchange.<sup>91</sup> As a result of its success, the STEM Exchange has been expanded to include details of relevant work experience opportunities via the STEM Experience site.<sup>92</sup>

The evaluation of the programme included an attempt to assess the value for money of the activities undertaken within the programme, estimating the potential savings which could be made through a 10% reduction in recruitment agency costs and annual staff turnover rate, the value of increased CPD and the value of the public relations and marketing activity. The report suggests that the impact and Return on Investment (ROI) for the elements of the programme are worth in excess of £2 million.<sup>93</sup> However analysis

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<sup>88</sup> Ibid.

<sup>89</sup> Ibid., p.4

<sup>90</sup> Ibid., p.8

<sup>91</sup> [www.semta.org.uk/STEM-exchange](http://www.semta.org.uk/STEM-exchange)

<sup>92</sup> [www.stemexperience.co.uk](http://www.stemexperience.co.uk)

<sup>93</sup> The STEM Alliance (2016), *STEM Improvement Programme Evaluation Report*, p.15



is based upon estimates and assumptions rather than robust research or financial data and therefore this ROI cannot be verified. Furthermore, analysis of the success of the programme primarily relied on activity and volume data such as attendance figures, numbers of resources developed, expressions of interest in STEM teaching and production of websites. Some analysis of survey data with participants is evident, however the size and representativeness of the sample is not clear. Whilst the findings can be taken as an indication of the positive outcomes of the programme, they lack robustness and provide no evidence of causality.

### **Premium Graduate Initial Teacher Education Scheme (2015-2016)**<sup>94</sup>

The Premium Graduate Initial Teacher Education Scheme was a pilot programme which aimed to attract high calibre graduates to teach in FE. A strategic consultation was conducted ahead of its launch, gathering feedback from FE teaching and training professionals, FE managers and members of the Association of Graduate Careers Advisory Service's Teaching and Related Professions Task Group.<sup>95</sup> A report on the consultation concluded that there was an opportunity to increase the number of graduates who choose a career in FE and suggested that a graduate recruitment scheme for FE teaching and training could be an effective route; its specific recommendations were:<sup>96</sup>

- An overhaul of the information about FE teaching and training, including profiles of institutions and qualifications, routes into the profession, career profiles, progression, training and development opportunities, and salary expectations.
- Improved links between FE institutions and university careers guidance teams, ensuring they have up-to-date information on the sector.
- Competitive positioning of the FE sector to ensure it is not viewed as 'second best' compared to the school sector, or any other profession, including the opportunities for experiences, employment, salaries and professional development and recognition it has to offer.

The scheme was delivered by a consortium led by Canterbury Christchurch University, Blackburn College and Middlesbrough College. The programme provided a route into teaching with on-the-job learning, professional support and relevant ITT provision, leading to teaching qualifications and QTLS status over two years. The pilot cohort graduated in 2016 and provided over 40 graduate teachers into the workforce.

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<sup>94</sup> <http://www.et-foundation.co.uk/supporting/support-teacher-recruitment/premium-graduate-scheme/>

<sup>95</sup> ETF (2014), *What needs to be done to promote teaching in further education as an attractive career option to top graduates and well-qualified industry professionals? Strategic consultation on premium graduate recruitment*, pp.31-32

<sup>96</sup> ETF (2014), *What needs to be done to promote teaching in further education as an attractive career option to top graduates and well-qualified industry professionals? Strategic consultation on premium graduate recruitment*, pp.31-32

The scheme was not renewed for 2016/17. Within its evaluation of the FE Workforce Programme, BIS (2016) reported that ‘relatively few’ providers had been aware of the scheme.<sup>97</sup> When explained to them, providers were generally in support of the aims but noted that it ‘was only likely [to] attract a small number of appropriate applicants’ and felt those delivering the scheme ‘would need to be geographically dispersed to attract prospective teachers’.<sup>98</sup>

In terms of attracting recruits, the lead providers of the scheme reported that localised recruitment drives were perceived to be the most effective (compared to national promotion) as individuals were unlikely to relocate to take part, thus ‘they were more likely to recruit local learners’.<sup>99</sup> It was noted that providing adequate time to promote a programme was importance in ensuring a ‘good range of candidates’ (i.e. if a scheme is promoted late in the academic year, prospective candidates may already be enrolled onto other courses).<sup>100</sup>

Nonetheless, providers that the scheme was helpful in attracting highly-skilled recruits to FE teacher training.

‘Providers found that the scheme was particularly helpful in marketing the [FE] sector at recruitment fairs, where recent graduates were attracted to the opportunity to work and train at the same time’.<sup>101</sup>

The evaluation report also indicated that some recipients had been able to ‘fast track’ into senior teaching roles, as providers had were able to support these highly-skilled recruits to develop leadership, planning and management skills alongside teacher training: ‘As such, some of the providers offering the premium graduate scheme have plans to continue to offer a higher level ITE route as an alternative pathway to ITE students on a cost-recovery basis’.<sup>102</sup> In addition, the scheme was felt to be complementary to the offer of other programmes such as the bursary scheme and maths recruitment incentive – promoting the sector to ‘high-calibre graduates’ who may have not considered the sector otherwise.<sup>103</sup>

### **SET for Teaching Success Programme (2017-present)**<sup>104</sup>

Commissioned and funded by the Education and Training Foundation (ETF), the programme aims to recruit and train 50 science, engineering and technology (SET) graduates or experienced industry professionals to become FE teachers. The programme may also include scope to train existing non-teaching FE staff who would like

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<sup>97</sup> BIS (2016), *FE Workforce Programme Evaluation* (unpublished), p.53

<sup>98</sup> Ibid.

<sup>99</sup> Ibid., p.59

<sup>100</sup> Ibid.

<sup>101</sup> Ibid., p.68

<sup>102</sup> Ibid.

<sup>103</sup> Ibid., p.76

<sup>104</sup> <http://www.et-foundation.co.uk/supporting/support-teacher-recruitment/set-teaching-success/>

to progress into teaching positions. The programme is based on ETF's Premium Graduate Programme and Maths Graduate Recruitment scheme and is being delivered across two hubs, Blackburn College in the North and emfec in the South to support delivery of a one or two year teaching qualification at level 5 or above.<sup>105</sup> The scheme provides a grant of £5,000 to support providers with recruitment and replacement staff costs, for example, cover for the trainee teachers, plus up to £6,000 for training fees, with employers meeting the cost of salaries for recruits. Additionally, the programme offers coaching and mentoring for trainees, trainee CPD, an industry placement, conferences and a two-day residential providing learning and networking opportunities.<sup>106</sup>

The scheme is currently in its first year and no evaluation has yet taken place.

### **Retrain and Retain (2017-present)**<sup>107</sup>

An ETF programme providing financial and practical support to FE colleges and Independent Training Providers to enable them to retrain qualified FE teachers and trainers as mathematics or English teachers. The scheme aims to help address the shortage of mathematics and English teachers, whilst also retaining staff affected by fluctuating demand for teachers in other subject areas. A bursary is paid to the organisation of £2,000 per participating staff member, up to a maximum of £10,000 per organisation, however there is no limit to the number of teachers than can participate.

Organisations receiving the bursary are asked to commit to allowing participants to complete 10 days of mathematics or English continuing professional development (CPD) to enable them to teach to GCSE level, provide support via an internal representative, encourage participants to receive specialist mentoring and provide suitable employment for those completing the training. The scheme is currently in its first year and no evaluation has yet taken place.

### **Further Forces (2017-present)**<sup>108</sup>

A two-year programme funded by ETF in partnership with the Gatsby Charitable Foundation aiming to retrain 110 armed forces service leavers to teach technical subjects such as science, engineering and technology. The programme supports service leavers in securing an employed teacher training post with an FE provider, through a career transition programme. The programme helps service personnel to identify potential FE employers, develop their job application and interview skills and provides teacher training and support. The scheme leads to a university awarded teaching qualification on completion of the programme, with teaching provided by University of Portsmouth and mentoring by University of Brighton. The project is being rolled out through two national

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<sup>105</sup> emfec is a membership body with charitable status that provides a wide range of services and support to colleges, providers and partners in the FE and skills sector

<sup>106</sup> [https://www.emfec.co.uk/services/our-projects/#project-2;](https://www.emfec.co.uk/services/our-projects/#project-2)  
<https://www.blackburn.ac.uk/university/additional-information/set-for-teaching-success-programme/>

<sup>107</sup> ETF (2016), *Retrain and Retain: A maths and English teacher retraining programme*

<sup>108</sup> <http://www.port.ac.uk/school-of-education-and-childhood-studies/further-forces/>

hubs – one in the North of England and one in the South. The scheme is currently in its first year and no evaluation has yet taken place.

### **Pathways to FE Teaching (2017-present)**<sup>109</sup>

The Pathways to FE Teaching scheme aims to raise awareness of FE teaching as a career path for graduates. The scheme is funded by ETF with delivery by East Durham College and provides FE work placements in colleges or independent training providers for undergraduates in their third year of study.

Students undertake a structured programme of activities, including working with learners and attending staff meetings, and are supported by ongoing mentoring provided by ETF.

The scheme began in 2017 with a pilot of 20 students and the pilot is currently being extended across all regions in England, aiming to place a further 160 undergraduates by the end of 2018. Whilst the scheme has yet to be evaluated, feedback from an interviewee suggests the experience has been positive for participants, such as one student who secured an FE teaching position as a result of their placement and another student who was now considering teaching in FE as a career option. The scheme is currently in its first year and no evaluation has yet taken place.

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<sup>109</sup> <http://www.et-foundation.co.uk/supporting/support-teacher-recruitment/pathways-fe-teaching/>

## 2.4 Summary of FE incentive programmes

Table 2 summarises all of the FE incentive programmes identified during the literature search.

**Table 2: Summary of FE incentive programmes 2000-present**

<b>Scheme</b>	<b>Effective dates</b>	<b>Brief description</b>
Teaching Pay Initiative	2001-2003	Facilitated recruitment and retention of good FE staff via a reward for making a significant contribution towards raising standards
FE (Post 16) Initial Teacher Education Bursary	2000-2010	Contribution towards training costs following introduction of mandatory qualifications in 2001 and HE fees in 1998
FE Golden Hellos	2002-2010	Financial award to help attract and retain good teachers within the FE sector and address perceived movement from FE to school sector
Initial Teacher Training Grant	2010-2013	Provided a contribution towards the costs of FE teacher training following the cessation of the FE (Post 16) Initial Teacher Education Bursary
Initial Teacher Training Fee Awards	2012-2013	Financial award payments towards the costs of training introduced as an interim measure to support teachers already undertaking qualifications to meet the costs of increased fees for HE
FE Initial Teacher Training (ITT) Bursary	2013-present	Bursary payments to attract and retain new high-quality graduates as English or mathematics teachers (included SEN from 2013-2016 only). Introduced in response to the increased demand for English and mathematics teachers following post-16 education reforms
Subject Knowledge Enhancement (SKE) Programme for Mathematics	2016-present	Fully funded SKE mathematics programmes aimed at highly qualified graduates applying for ITT to help address increased demand for post-16 mathematics teachers
Maths Golden Hellos	2014-2015	Short term programme of payments to attract and retain new specialist mathematics teachers

**Table 2 (cont.): Summary of FE incentive programmes 2000-present**

<b>Scheme</b>	<b>Effective dates</b>	<b>Brief description</b>
ETF Maths Graduate Recruitment Incentive Award	2014-2015	Short term programme of funding to FE and Skills organisations to encourage innovation in recruitment and retention of new graduate mathematics teachers
The STEM Alliance STEM Improvement Programme	2014-2015	Funding to deliver a programme of activity to increase the recruitment and retention of STEM teachers to meet current and future sector needs
Premium Graduate Initial Teacher Education Scheme	2015-16	Pilot delivering a supported ITT programme via a consortium of colleges, aimed at attracting high calibre graduates into FE teaching
ETF SET for Teaching Success Programme	2017-present	Funding to support providers with recruitment, ITT, mentoring and professional support, aiming to recruit and train 50 science, engineering and technology graduates or experienced industry professionals to become FE teachers, aiming to address shortage subject areas
ETF Retrain and Retain	2017-present	Financial and practical support to FE colleges and Independent Training Providers to enable them to retrain qualified FE teachers and trainers as math or English teachers, aiming to address shortage subject areas
ETF Further Forces	2017-present	Programme to retrain 110 armed forces service leavers to teach technical subjects such as science, engineering and technology, aiming to address shortage subject areas
ETF Pathways to FE Teaching	2017-present	FE work placements for third year undergraduates, aiming to raise awareness of FE teaching as a career path

A number of key findings can be drawn from the FE incentive programmes identified:

- Incentive programmes have primarily focussed on the recruitment of teachers into FE ITT rather than employment, and on pre-employment schemes rather than in-service initiatives.** Whilst the limited evidence available suggested that bursaries were fairly successful in attracting recruits to FE ITT, there were fewer initiatives evident that aimed to support recruitment directly into teaching (rather than teacher training), progression from training into employment,

or FE teacher retention once in-service. This indicates that there is a good opportunity for further development and piloting of approaches focused on progression into teaching and longer-term retention in-service.

- **Evaluation findings suggest that financial incentives to encourage take up of ITT training have been somewhat successful and are most effective when offered in tandem.** For example, initiatives such as the FE ITT Bursary, Maths Recruitment Incentive and Premium Graduate Scheme were offered simultaneously by providers and perceived to complement one another, enabling providers to attract a range of different individuals to FE ITT. This suggests that offering a suite of initiatives may help to increase awareness of the support available to potential candidates and the visibility of the occupation more widely.
- **More robust evaluation activity would ensure that good practice in FE recruitment and retention is identified and taken forward for future schemes.** Nine of the fifteen schemes were identified as having been evaluated to some extent. Four currently active schemes were launched in 2017 and thus may be subject to future evaluation.<sup>110</sup> The evaluation outputs examined during this literature review were primarily based upon feedback collected from participating organisations and individuals following engagement with an incentive programme. Impact data typically included counts (such as the number of awards or participants, number of students or teachers recruited and ITT dropout rates) and subjective data such as the perceptions of participating organisations, students and teachers. However, no baseline or control samples were included for comparison within any of the evaluations, meaning that it was not possible to attribute a significant causal relationship between the schemes and rates of FE recruitment or retention. In addition, none of the evaluations tracked recipients into employment – as such, there is currently no published assessment of longer-term impacts of incentive schemes. One report (from The STEM Alliance) attempted to assess ‘value for money’, via analysis on ‘return on investment’.<sup>111</sup> However, the calculations were based upon estimates and assumptions and therefore were indicative only of the potential value for money of the programme. This suggests a need for increased evaluation activity in relation to bursary programmes (carried out independently of funding bodies and deliverers), to better establish the impact of these interventions, understand causality and calculate value for money. Ideally, evaluation activity should be integral to all future programmes, with a framework of success measures confirmed before rollout to ensure appropriate and robust data are collected at critical points throughout delivery (e.g. baseline, mid-delivery, on completion and post-completion tracking) and from all stakeholders (funders, providers, recipients and those that did not complete/progress into teaching).

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<sup>110</sup> SET for Teaching Success Programme, Retrain and Retain, Further Forces, Pathways to FE Teaching

<sup>111</sup> The STEM Alliance (2016), *STEM Improvement Programme Evaluation Report*

- **Some initiatives have targeted providers/colleges, whilst others have been aimed directly at potential candidates. However, it is not possible to determine the most cost-effective strategy for recruitment and retention in FE.** Programmes have provided financial incentives direct to individual candidates (e.g. to cover the costs of training), or to providers/colleges. Where funding was provided to the latter, it appears to have been used to cover the costs of a variety of activities associated with recruitment including public relations activities and marketing, development/sharing, workshops, networking opportunities, ITT delivery, professional development, mentoring/support and increased starting salaries. However, whilst there is evidence from the evaluations that both strategies can result in a positive impact on recruitment and/or retention of FE teachers, the limitations in data currently available mean that it is not possible to determine which strategies are most effective or offer the best value for money. Future evaluations should therefore include measures (relevant to the specific programme) that allow for a clear assessment of cost-effectiveness in order to guide funding policy direction.



### **3. Evidence from interviews with FE ITT providers, colleges and FE bodies/associations**

This section summarises the feedback from the ten in-depth interviews conducted by CGR with FE ITT providers, FE colleges and college funding bodies/associations. It identifies current and past incentives and strategies used to recruit and retain FE teachers, what is known of their impact and effectiveness and the perceived key challenges for the sector.

#### **3.1 Incentives for FE recruitment and retention**

Three of the five FE ITT providers (one university and two FE colleges) mentioned utilising bursaries to recruit trainees. All of these were using the FE ITT Bursary for English and mathematics and had been for a number of years (around four to five). One was using the SKE bursaries.

The remaining two ITT providers interviewed mentioned their involvement in specific external funded projects that aimed to encourage potential trainees into FE teaching. For one provider this was a project that aimed to provide undergraduate students from all subjects with a work experience placement in an FE organisation with a view to then learning more about the benefits of being a teacher in FE.

Interviewees viewed bursaries as being focussed on the initial stage of drawing trainees into ITT, rather than them addressing how trainees are supported to take up their first FE teaching role and then retained in the sector for the longer term. It was accepted that bursaries could help certain types of trainees to take up ITT who would not have otherwise been able to afford to go into teaching. However, it was also reported that the bursaries were only accessible to a very small number of trainees (e.g. from specific subjects) and therefore having a bursary attached to a broader spread of subject areas would be helpful. Overall, bursaries were seen as just one element of a wider range of strategies that need to be utilised for recruitment and retention to be effective.

Two of the FE colleges interviewed provided their own additional financial incentives for the recruitment of trainees or teaching staff in specific hard-to-recruit subject areas. One college provided a £3,000-£5,000 salary supplement for STEM, electrical engineering and plumbing. The incentive was utilised as a tool for both recruitment, to fill vacant roles, and retention, to keep current staff from leaving. The other FE college developed a separate salary scale for STEM and construction teachers, which increased the salary package by around £10,000.

Interviewees also gave anecdotal evidence of other FE colleges providing their own financial incentives, for example, internally funded 'golden hellos' or ITT bursaries. For example, one ITT provider commented that they offered a 50% reduction in fees for the teaching qualification for those who took up a role without currently having the

qualification. However, the use of financial incentives by colleges was perceived to be ad-hoc and at an individual college level, with no consistency across the sector. The lack of consistency in offering financial incentives to train was believed to cause confusion in the sector.

Three colleges mentioned participating in ETF-funded recruitment schemes, either in the past or currently, aimed at recruiting or retaining different types of teaching staff. Past schemes were perceived to have been moderately successful, in that they had resulted in the successful production, recruitment or retention of some (but not all) participants into FE teaching. For the current programmes, it is too early to gauge their impact or success.

Interviewees provided a number of examples of the lessons they had learnt from participation in the schemes. It is important to note that due to the small number of interviewees these examples are illustrative at an individual provider or FE sector representative level, rather than consistent across all interviewees. Examples included:

- Programmes which encourage the building of relationships between providers in the sector help to develop a more strategic and collaborative approach to tackling recruitment and retention issues.
- The timing of programmes is critical. To maximise their potential impact, programmes should be aligned with FE college planning and recruitment cycles and should also take into account wider FE sector policy changes, such as area reviews, which can impact upon providers' recruitment strategies.
- Providing mentoring for trainees is vital in order to support them through their training period and facilitate their successful transition into teaching. For example, one ITT provider allocated mentors within trainees' departments, but also looked at allocating additional mentors based on specific skills gaps the trainees may have.
- Regular reviewing of the programme content to ensure that there was sufficient coverage of English and mathematics – *“we have made sure there is one dedicated module in the programme which is long and thin, so it is stretched over the academic year to retain the focus on English and Maths for those that are taking advantage of the bursary”* (ITT Provider).
- Internal evaluation of the impact and success of programmes, through feedback from participants, and analysis of recruitment success and learner outcomes is important to establish what is effective. An example from one ITT provider included running focus groups with staff at all levels when developing a new human resources strategy. Another ITT provider mentioned that they tracked the progression of their trainees for two years after completing their training.

FE colleges and ITT providers mentioned utilising a wide range of other, non-financial strategies to recruit and retain trainees and teachers:

- Recruitment days, where potential recruits visit the college, observe lessons and meet with the ITT department to develop an understanding of the process of becoming an FE teacher.
- Promotion via industry recruitment channels, publications and websites for hard-to-recruit and vocational subjects.
- Presence at industry recruitment shows, such as the National Engineering Recruitment Show, to promote the benefits of teaching in FE and collect contact details of potential recruits.
- Paid internship programmes, particularly for shortage subject areas, to allow potential trainees to gain experience of FE teaching whilst maintaining an income.
- Flexibility in study time so that trainees can undertake paid teaching work. This was reported to have dual benefits, in that it relieves financial pressures by allowing trainees to earn money and can also lead to permanent employment once their training has completed.
- Structured support and mentoring trainees during their first year in teaching, keeping in regular contact to make sure they settle into placement and also supporting them in delivering a good standard of teaching. For example, one ITE provider discussed their NQT champions scheme which involves providing ongoing support for their trainees in their first year of teaching.
- Family friendly policies, including flexible working patterns, working from home, maternity pay, sickness and absence schemes and generous holiday entitlements.
- Payment for additional working hours, allowing teachers to increase their overall earnings.
- Promoting the benefits of their working environment, such as modern facilities and equipment.
- Structured management programmes to support staff development and enable them to make swift progress into management.
- Within and cross-departmental mentoring, where skills gap assessments help to identify additional support needs. For example, one college identified that many staff could benefit from a 'technology buddy' to support them with the use of technology in their teaching.
- Strong CPD programmes and clear progression routes, supporting staff to develop and reach their career goals, increasing job satisfaction and helping to retain them within the organisation.

## 3.2 Key challenges in FE teacher recruitment and retention

### 3.2.1 Sector changes/instability

Interviewees raised concerns that the significant changes the FE sector has faced over recent years, including policy changes and area reviews,<sup>112</sup> has led to a perceived lack of job security in the sector and this can filter down to new trainees - *“We are going to have recruitment and retention problems as long as the sector is subject to as much disruption as it has been... the frequency of change is causing retention issues”* (FE sector representative). The variability of providers and courses, particularly for apprenticeships, was also perceived to add to this sense of instability.

Interviewees reported that employers were reluctant to recruit teaching staff for permanent roles due to financial uncertainties, curriculum changes and the implementation of area reviews, which made it difficult to see where skills gaps lie and could result in the need to cut staff. As a result, there can be a lack of connectedness between the availability of training places and the availability of permanent teaching roles. Furthermore, subject excesses and shortages can lead to staff being asked to teach a subject other than their core subject.

### 3.2.2 Negative image of teaching/education sector

There was a consensus amongst those interviewed that the education profession as a whole suffered from a negative image, which impacted on the perceptions of FE. Negative perceptions included poor rates of pay, excessive workload, high accountability pressures, frequent policy changes and specifically for FE, a high level of job insecurity. One ITT provider mentioned trying to counter the negative press about teaching, leading by example by having knowledgeable, passionate and committed teaching staff to pass their enthusiasm onto trainees.

### 3.2.3 Profile of FE teaching as a career path

All interviewees held the view that there was a lack of awareness of the FE sector as a potential career option and this presented a significant barrier to recruitment. The lack of awareness of FE teaching was seen to be further exacerbated by the relatively higher profile of teaching in schools. *“FE is an unseen and unknown sector. When we recruit trainees to teach these days they mostly want to teach in schools”* (College FE ITT Provider).

FE teaching was described as a career that people often come to ‘accidentally’, after having had a career in industry, although it was recognised that industry experience

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<sup>112</sup> Area reviews were a restructuring of the post-16 education and training sector, initiated by the government, which ran from September 2015 until March 2017. Each area review concluded with a series of recommendations outlining how providers could better meet the local skills need while also increasing efficiency and resilience.

could be particularly valuable for many areas of FE. Awareness of FE teaching as a career path amongst undergraduates was seen as particularly low, hampering graduate recruitment to the sector as it was not on the career consideration list. *“I attend university careers events and I have undergraduates coming past who don’t know what FE is. Not only have they not thought of teaching in FE, they don’t even know what it is”* (FE sector representative).

Efforts to increase the profile of FE teaching amongst graduates were mentioned, such as attendance at university careers fairs, but overall FE was not seen as having the presence of promotional drives for school teaching, such as *‘Get into Teaching’*. It was also perceived by three interviewees to be a precarious and fragmented sector for attracting new recruits.

*“The nature of employment in the FE sector is quite precarious and very often newly qualified FE teachers are session contracted or on zero hours contracts. It doesn’t give the stability that other sectors do. The sector is very fragmented – there are lots of different contexts you can work in... there is no overarching overview of what is being offered in each... The main barrier is that there is nothing set out in statute that you have to be trained to teach in the FE sector and some FE colleges are paying untrained teachers”.* (University ITE provider)

Where colleges were paying unqualified recruits, two providers noted this as an issue in terms of encouraging individuals to train – *“If they are coming in as an unqualified teacher they get £17,000 the college might put them on a qualified teacher pay scale to encourage them to stay if they seem committed”* (College ITE provider). To help mitigate this challenge, two interviewees (University ITE provider and FE sector representative) noted the need for the sector to better promote opportunities such as training to QTLS status, in order to showcase the ‘professionalism’ of FE teaching and the career progression routes available.

The strategy of specifically targeting graduates to enter FE teaching was questioned by one FE sector representative, who felt that the ability to be a good teacher was not perceived to be necessarily linked with being a (good) graduate. Those who entered by other, non-university, routes were described as potentially having a better fit with the sector, as they were more likely to have experienced some of the same challenges that their students had faced, or have some of the specific industry skills needed for teaching particular subjects or qualifications – *“a lot of provision can’t be delivered by graduates anyway, for example construction needs to be taught by those from industry, not graduates”* (FE sector representative). This suggests that a multi-faceted approach to targeting and ‘selling’ the sector to potential trainees using various routes (e.g. university and industry) is likely to be most beneficial in raising the profile of teaching within the sector.

### 3.2.4 Awareness and eligibility of incentives

Five interviewees expressed concerns that there may be a lack of awareness amongst potential trainees of available bursaries and other incentives available for FE ITT due to a lack of advertising. Unlike the school sector, there is no national advertising of FE and bursaries and this was described as an important issue. One FE college commented that increasing advertising around the teaching opportunities in the FE sector in the media, at a similar level to what was seen for schools, would help to increase awareness and possibly interest in teaching opportunities in the sector. The perception of one FE sector representative was that regular changes to funding and criteria could lead to trainees being unsure about whether there would be funding availability if they took up an ITE place, which was felt to be off-putting.

Five interviewees suggested that targeting high achieving graduates specifically, particularly for mathematics, was not always effective because graduates were perceived to be able to achieve significantly higher rates of pay from working in industry. *“The bursaries are moderately helpful, but they only apply to a tiny proportion...Why would they want to teach when they can get considerably more money in industry?”* (College ITE Provider). In addition to financial considerations, one interviewee felt that trainees *“find it difficult to adjust”* where they have *“studied maths at degree level then go into the FE sector where they are teaching very basic maths”* (University ITE provider).

The current eligibility criteria for the FE mathematics and English bursaries were questioned by three ITE providers. This was due to the limited range of eligible subjects that did not always meet local need - *“it would be better for us if there was a broader spread of subject areas, that would be helpful for us”* (College ITE Provider). One ITE provider suggested eligibility for vocational subjects such as construction to help attract more individuals from industry with *“a lot of experience and knowledge in their field”* but who may not be graduates from HE (College ITE Provider).

Two interviewees believed that bursaries had the potential to attract individuals into FE teaching who may not have the required level of commitment; they described anecdotal evidence of some people entering FE ITT who only applied in order to receive the bursary.

### 3.2.5 Lack of support

Five interviewees voiced concerns about whether sufficient support was available for those training and in their first year of teaching (this was suggested by a range of interviewee types including University and College ITE Providers and FE sector representatives). Anecdotal feedback suggested that due to financial and capacity constraints, employers may be unable to provide adequate support for new teachers, such as mentoring, CPD, reduced timetables or time to do planning and preparation. This was particularly seen to be the case where staff were employed part-time or on temporary contracts to ‘plug gaps’ in staffing. One FE sector representative commented

on the pressure that teachers face in their first year of teaching – *“Employers need them to hit the ground running and that’s overwhelming because the first year of teaching is a really steep learning curve”* (FE sector representative).

### 3.2.6 Competition from the school sector

Competition for teachers from the school sector was seen as a key challenge by three interviewees (University ITE Providers and FE sector representative), as the sector was perceived to have a greater need for teachers and therefore takes priority, higher profile and better pay and conditions. *“We are in a competitive market and we are completely out gunned by the schools sector”* (FE sector representative). It was suggested that promotion of FE teaching could go some way to addressing the imbalance, but that this alone would not be sufficient. These interviewees suggested national and more visible promotion of the benefits of FE teaching, such as flexibility and the challenge and satisfaction of working with a diverse range of learners.

### 3.2.7 Pay differentials versus industry

All interviewees raised the issue of pay levels and the disparity between FE sector pay and some areas of industry. In certain subject areas, such as STEM, construction and plumbing, the salaries that can be achieved working in industry are significantly higher than teaching salaries, which causes a significant issue for the recruitment and retention of FE teaching staff. Whilst there was evidence from two FE colleges were funding pay increases in these shortage subject areas, not all providers were able to finance such strategies.

*“What we didn’t realise at first was that in trying to attract from industry our pay package was considerably less than what they could get in industry, so we have had to increase our pay packages in these subject areas. We came up with whole new pay scale to increase it by about £10, 000 and that has really helped”*. (FE College)

Whilst colleges do utilise other, non-financial strategies to recruit and retain teachers which were deemed helpful, in hard-to-recruit subjects the pay differential was perceived to put the sector at a serious disadvantage. *“It doesn’t matter about pensions schemes and all the rest, they are helpful - but the bottom line is the money”* (FE College).

However, it is important to note that these views are just the perceptions of a small number of interviewees and does not include the views of trainees. The role that pay plays in attracting or discouraging individuals from the sector is complex and outside the scope of this review.

One ITT provider felt that there was more that could be done in terms of long-term planning in the sector to understand where the skills needs would be in the future and to

effectively recruit and train staff accordingly, to help combat this issue. However, it was recognised there were challenges in pre-empting staff skills gaps too far in advance.

### 3.3 Key learnings for FE recruitment and retention

A number of recommendations or lessons learned for FE recruitment and retention were mentioned by interviewees, drawn from their own experiences in the sector and from previous and current incentive schemes and strategies:

- An increased sector presence was mentioned by all interviewees, via promotion, outreach into industry and engagement with the potential workforce, including graduates and professionals. Establishing a presence within professional bodies and trade organisations was also suggested as a good mechanism for generating interest amongst potential trainees.
- One ITT provider suggested that additional funding should be offered to providers, rather than offering a trainee a financial incentive. It was felt that this would allow the provider to cover the costs of providing enhanced CPD, mentoring and a reduction in their timetable to support their retention in the sector. Trainees could then apply for support with living costs from the provider. However, most interviewees believed that a mix of financial incentives, for individuals and providers, would most effective.
- One FE sector representative commented that where funding was provided to organisations, there should be some flexibility allowed in the use of those funds, within clear guidelines. This was described as highly beneficial, as it allows organisations to be more creative in developing recruitment and retention solutions. *“Setting criteria in ‘loose-tight’; loose enough to let them create solutions, but tight enough to be audited”* (FE sector representative).
- Commitment to funding schemes for a two-to-three-year period according to one FE sector representative would remove the uncertainty for providers and trainees as to whether financial support for ITT is available, and announcements of changes to funding should be made earlier to ensure they align with ITT recruitment cycles – *“the issue over bursaries is that frequently for the following academic year they’re not announced until April/Easter. So if you want to start an ITT course, you are applying to a university and they can’t tell you if you are going to get a bursary”* (FE sector representative).
- One FE college commented that a college funding subject weighting would be beneficial for recruitment, where increased funding is provided to enable colleges to increase pay for teachers in subject areas where there is a high differential between industry pay levels and FE teaching pay levels, e.g. STEM.



- One FE sector representative commented that paid internships for industry professionals would be helpful in encouraging professionals into FE. Fee waivers for in-service ITT would also be of benefit to encourage those already teaching to become qualified.
- One provider suggested that there should be more rewards for those that have remained in teaching for a particular period of time e.g. the Government contributing towards a Masters degree to support ongoing education.
- It was also suggested that in order to attract graduates, a clear career path with the opportunity for early progression is needed, mirroring programmes in industry such as graduate management programmes.

## 4. Broader recruitment and retention strategies from education

This section of the report draws out approaches to addressing recruitment and retention challenges in schools and HE. It identifies specific initiatives that have been introduced and provides evidence where possible of the impact of these initiatives on recruitment and retention in these sectors.

### 4.1 Higher Education

Literature on approaches to supporting recruitment and retention in HE is minimal.

HEFCE (2008) presented the findings of a recruitment and retention survey of 114 Higher Education Institutions (HEIs).<sup>113</sup> Although the research found that recruitment and retention was not a major problem for the majority of HEIs it did find that there had been an increase in action being taken to address recruitment and retention issues. For example, one quarter of HEIs surveyed in the research reported upgrading posts for support staff and the most common technique employed to tackle recruitment and retention issues was the use of market supplements.<sup>114</sup> The research however did not explore HEIs views on the effectiveness or benefits of introducing such financial incentives.

Further research by the Universities and Colleges Employers Association (2017) explored the workforce trends and current challenges facing the HE sector.<sup>115</sup> Where HEIs were facing recruitment challenges it was most common for them to deal with this by recruiting candidates from overseas (64%).<sup>116</sup> The use of financial incentives to address recruitment issues was reported to be minimal; just around one third of HEIs reported sponsoring relevant professional qualifications to upskill existing staff in response to recruitment difficulties. Upskilling existing employees to fill hard-to-recruit positions was the key strategy HEIs were using to respond to recruitment difficulties. In addition, interviewees involved in the research offered several alternative initiatives to address recruitment difficulties including reviews of pay and related benefits, offering market supplements, reduced accommodation costs and offering low interest loans.<sup>117</sup>

Similarly, HEI approaches to addressing retention issues were primarily focused on non-financial incentives. The most common approaches to addressing retention for both staff groups were 'to improve line managers' people skills, followed by offering mentoring/

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<sup>113</sup> Higher Education Funding Council for England (2008), *Recruitment and Retention of Staff in Higher Education 2008*

<sup>114</sup> A fixed and separate amount of money in addition to an employee's basic salary used to recruit and retain individuals as a result of competitive market pressures.

<sup>115</sup> Universities and Colleges Employers Association (2017), *Higher Education Workforce Survey 2017*

<sup>116</sup> *Ibid.*, p.20

<sup>117</sup> *Ibid.*, p.21

coaching and increasing learning and development opportunities'.<sup>118</sup> However, improving pay and benefits was also reported to be a strategy used for around one quarter of HEIs.

## 4.2 School initiatives to support recruitment

The use of financial incentives to attract potential trainees into teaching is well established within the school sector. As such, sector views and evaluations of their implementation provide useful wider learning for the FE sector in understanding what works in the use of ITT financial initiatives and the challenges in their use.

Over recent years, similar to the FE sector, financial incentives have been used to attract applicants to shortage subjects where there have been severe challenges in the recruitment and retention of teaching staff. As detailed in the National Audit Office's 2016 report *Training new teachers*, in 2016-2017 the DfE offered bursaries ranging from £3,000 to £30,000 for its highest priority shortage subjects.<sup>119</sup>

Literature suggests that the use of bursaries to encourage trainees into the sector can have a positive impact on the number of training applications. The National Audit Office's report (2016) identified a direct correlation between the availability of bursaries and the number of training applications. – '... an increase of £1,000 in bursary value led to a 2.9% increase in applications'.<sup>120</sup> The report also highlighted previous qualitative research undertaken by DfE which explored the role of bursaries in decision making. It found that learning what funding was available to train, particularly for potential career changers, had been a key trigger in their decision to explore teaching training. However, the National Audit Office's report concluded that there had been insufficient analysis to date to demonstrate the long-term impact of teacher training bursaries.<sup>121</sup>

Others in the school sector were more sceptical about the efficacy of bursaries and financial incentives in recruiting and retaining teachers. The School Teachers' Review Body was asked to provide recommendations on the adjustments that should be made to teachers' salaries to promote recruitment and retention. In its published report (July 2017)<sup>122</sup> a number of consultees raised concerns about the use of bursaries and financial incentives, specifically the lack of guarantee that bursary recipients would go on to teach after completing their training. This was supported by research by the Higher Education Policy Institute (Cater, 2017)<sup>123</sup>, which suggested that the current model of funding incentives for potential teachers was flawed – 'the current model of funding support, with

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<sup>118</sup> Universities and Colleges Employers Association (2017), *Higher Education Workforce Survey 2017*, p.4

<sup>119</sup> National Audit Office (2016). *Training new teachers*

<sup>120</sup> *Ibid.*, p.36

<sup>121</sup> *Ibid.*, p.13

<sup>122</sup> School Teachers' Review Body (2017), *School Teachers' Review Body: Twenty-Seventh Report - 2017*

<sup>123</sup> Cater, J (2017), *Whither Teacher Education and Training*

incentives that exceed teachers' starting salaries for good honours graduates in certain disciplines, rewards training rather than teaching'.<sup>124</sup>

Cater (2017) recommended the need for changes to make teacher training and the profession more secure, reliable and attractive. The suggested changes were mainly non-financial initiatives including a new approach to marketing the profession, parity across the different teacher training routes and refining, clarifying and simplifying the career progression ladder within the profession. Cater also suggested a review of the current bursary scheme – 'considering the phased and monitored withdrawal of the current bursary system and the possible introduction of 'forgivable fees' for those who remain in teaching for a number of years and perform to a high standard'.<sup>125</sup> The concept of 'forgivable fees' is based on the premise that for some graduates who earn below a certain earnings threshold or meet certain conditions, the state would write off a portion of their tuition loan early (and is currently being trialled).

In 2004, the *Evaluation of the repayment of teachers' loans scheme* (Barmby and Coe, 2004) explored the extent to which a teacher's decision to enter the profession was influenced by the prospect of having their student loans written off, and whether this was an important factor in retention.<sup>126</sup> The evaluation found that for around a fifth (19%) of teachers, the scheme had influenced their decision to enter the teaching profession. However, others had a lack of awareness about the scheme prior to entering the profession. Overall, the evaluation found limited impact of the scheme on teacher retention – '44% of teachers disagreed that the scheme had been an important consideration for them to stay in teaching'.<sup>127</sup>

The impact of scholarships on generating interest in becoming a teacher were explored by NCTL in 2014.<sup>128</sup> Although not financially incentivised, the scholarships aimed to provide a package of non-financial benefits such as early career support and membership of an appropriate professional body. The research found that availability and awareness of scholarships could convert an interest in teaching to making an application, suggesting that it is a useful approach to supporting the recruitment of teachers. Over one quarter (26%) of respondents in the research had decided to apply to teaching because of the availability of scholarships. Just under one third agreed that scholarships had played some role in their decision to apply for ITT but it had not been the deciding factor. This highlights the value of non-financial benefits in attracting potential teachers into the school sector, and is an approach that could be considered within the FE sector.

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<sup>124</sup> Ibid., p.27

<sup>125</sup> Ibid., p.47

<sup>126</sup> Barmby, P and Coe, R (2004), *Evaluation of the repayment of the Teachers' Loans Scheme*

<sup>127</sup> Ibid., p.1

<sup>128</sup> Porter, S., Bear, K. (2014), *The role scholarships play in graduate recruitment for Initial Teacher Training*

Dolan et al (2012) explored how potential ITT applicants responded to financial initiatives, and in particular whether higher ability students were influenced by higher endowments.<sup>129</sup> The research concluded that offering higher endowments for priority subjects and degree classes did not impact negatively on the effort of other students. The research summarised that 'offering larger incentives for the most able students in high priority subjects and lower incentives for others would not affect applications for teaching in other, lower priority subjects'.<sup>130</sup> This finding is important to consider in the context of FE, as it indicates that increasing the incentive for trainees with particular attributes (e.g. qualifications, skills) may help boost applications for priority subjects.

There was some discussion in the literature about the impact of performance related pay on teacher recruitment, retention and motivation. Farrell and Morris's (2004)<sup>131</sup> survey of teachers found that teachers believed that performance related pay (PRP) would not improve recruitment, retention or motivation; this scepticism remained in evidence following the introduction of PRP in 2013 (although negative views were most in evidence among teachers at the top of the Upper Pay Scale, 'which could be due to the lack of scope for further pay progression with or without' PRP).<sup>132</sup> A literature review undertaken by the Warwick Institute in 2016 on teachers' pay and equality found only limited evidence that attrition in the profession was linked to pay, although the review found that this was more common amongst teachers early in their careers and male teachers.<sup>133</sup>

The most recent study to consider human resource management (HRM) practices – including PRP – in schools (2018) examined whether 'what works' across the schools workforce is comparable or different to other workplaces.<sup>134</sup> This study identified that various methods adopted during recruitment processes were more positively associated with workplace financial performance and labour productivity when compared to other workplaces of similar size/workforce demographics. These recruitment techniques included the use of references, including skills, qualifications, experience and motivation in recruitment criteria, the use of a personality/aptitude test or competence/performance test.<sup>135</sup>

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<sup>129</sup> Dolan, P. Metcalfe, R and Navarro-Martinez, D. (2012) *Financial incentives and working in the education sector*

<sup>130</sup> Ibid., p.4

<sup>131</sup> Farrell, C. M., and Morris, J. (2004). *Resigned compliance: teacher attitudes towards performance-related pay in schools*. Educational Management Administration and Leadership, 32(1), 81-104.

<sup>132</sup> Centre for Economic Performance (2015), *Teachers and Performance Pay in 2014: First Results of a Survey*

<sup>133</sup> Barnes, S., Lyolette, C., Atfield, G., and Owen, D (2016). *Teachers' Pay and Equality. A literature review*

<sup>134</sup> Bryson, A., Stokes, L., and Wilkinson, D. (2018), *Can HRM Improve Schools' Performance?*. Institute of Labor Economics. Discussion Paper No. 11348. For a description of data, key measures for analysis, and controls used within the study, see pp.8 – 12

<sup>135</sup> Ibid. See also: Bryson, A., Stokes, L., and Wilkinson, D. (2018), *Should schools bother with modern human resources management?*

‘By contrast, increased use of performance-related pay and performance monitoring, which do improve workplace performance elsewhere in the economy, are ineffective in schools. The only HRM practice that benefits both schools and other workplaces is more intensive provision of training’.<sup>136</sup>

More generally, discussion around teachers’ pay and the potential impact of pay levels on recruitment and retention has been ongoing over a number of years. There is clear evidence that the average starting salaries and profession-wide earnings for teachers are much lower than for other graduate professions.<sup>137</sup> Although schools have flexibility over pay and rewards to help them recruit and retain teachers in priority subjects and link increases in pay to performance, in July 2017 the School Teachers’ Review Body reported that many schools were not using these flexibilities.<sup>138</sup> Reasons for this included schools not being able to afford to use these flexibilities because of current funding levels – ‘for example, ASCL reported that schools’ financial constraints meant they were unable to implement pay flexibilities under the [School Teachers’ Pay and Conditions Document] STPCD and that a fully funded pay award would encourage schools to use these flexibilities more’.<sup>139</sup>

The House of Commons in its briefing paper *Teacher recruitment and retention in England* (12<sup>th</sup> June 2017) identified specific initiatives with a financial component that had been put in place since 2015 to increase teacher recruitment.<sup>140</sup> This included ITT initiatives such as the Future Teaching Scholars programme, the Maths and Physics Chair programme and the paid internship scheme which all provided various levels of financial incentive with the aim of trying to recruit 2,500 new mathematics and physics teachers. Other programmes such as the Returning Teachers pilot and the Returners Engagement Programme offered grants to attract existing qualified teachers back into the profession. All of these initiatives were overseen by the DfE.

The National Teaching Service (2016-2017) aimed to re-deploy talented teachers and middle leaders to work in underperforming schools struggling to recruit and retain good teachers.<sup>141</sup> The scheme was launched as a pilot by the NCTL in 2016, with the goal of recruiting 100 teachers.<sup>142</sup> The scheme offered up to £10,000 towards relocation or extended commute to schools in the North West. However, the scheme was withdrawn early in 2017 due to low numbers of teachers being recruited and matched with schools. An article by the TES reported that the scheme failed because the financial incentive was

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<sup>136</sup> Bryson, A., Stokes, L., and Wilkinson, D. (2018), *Should schools bother with modern human resources management?*

<sup>137</sup> School Teachers’ Review Body (2016), *School Teachers’ Review Body: Twenty-sixth Report – 2016*

<sup>138</sup> School Teachers’ Review Body (2017), *School Teachers’ Review Body: Twenty-seventh Report – 2017*

<sup>139</sup> School Teachers’ Review Body (2017), *School Teachers’ Review Body: Twenty-seventh Report – 2017*

<sup>140</sup> Foster, D (2017). *Teacher recruitment and retention in England*

<sup>141</sup> DfE (2016), *National Teaching Service: for teachers and middle leaders – How to become a National Teaching Service teacher or middle leader*

<sup>142</sup> DfE (2016), *National Teaching Service pilot gets underway*

insufficient to encourage teachers to relocate and a lack of schools offering employment.<sup>143</sup> This example illustrates that the amount of incentive offered can impact on individuals' decisions, however as an evaluation of the scheme was not identified through this review, it is difficult to fully understand the reasons for this scheme not being successful.

The following initiatives were subject to a process evaluation undertaken by the National Foundation for Educational Research (NFER) and Sheffield Hallam Institute of Education (SloE) – paid internships, Maths and Physics Chairs and Return to Teaching.<sup>144</sup> This was alongside teacher subject specialism training, which involved providing training in mathematics and physics to teachers who were not specialist in those subjects. Although only a process evaluation, the findings are useful for understanding which elements of delivery may support recruitment and retention in the sector. The key learnings from the evaluation of two delivery strands (Maths and Physics chairs and paid internships) within this process evaluation are detailed below.

## 4.2.1 Maths and Physics Chairs

This programme recruits, trains and places PhD researchers as teachers in schools. These post-doctoral researchers are placed in schools for three years, with the incentive of an uplifted salary and allocated time to continue their research.<sup>145</sup>

The evaluation found that the salary uplift and ability to continue their research was hugely appealing to students.<sup>146</sup> Although only a small number of chairs were interviewed in the evaluation (eight), four of these did not feel that they would be involved in ITT without the initiatives.<sup>147</sup> This suggests that the initiative may have benefits in recruiting teachers to the profession who would not have otherwise joined.

However, there were issues regarding the retention of chairs. The evaluation stated that the withdrawal rate was 31% for the 2015-2016 cohort.<sup>148</sup> There are also further implications on retention as participants were not obliged to commit to teaching after the three-year period.<sup>149</sup>

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<sup>143</sup> Hazell, W (2017), *DfE boss: Failed National Teaching Service done in a 'hurry'*, Times Education Supplement

<sup>144</sup> Straw, S. et al (2017), *Maths and physics teacher supply package*

<sup>145</sup> *Ibid.*, p.44

<sup>146</sup> *Ibid.*, p.48

<sup>147</sup> *Ibid.*, p.43

<sup>148</sup> *Ibid.*, p.48

<sup>149</sup> *Ibid.*, p.131

## 4.2.2 Paid internships

Targeted at penultimate year mathematics and physics undergraduates, this initiative offers paid internships over either four weeks or two periods of six weeks.<sup>150</sup>

Offering payment for the internship was a key success factor of this initiative. Other outcomes for participants included increased understanding of teaching; the opportunity to experience teaching and make an informed decision about it as a career choice and an increased interest in teaching. Some participants also reported that their involvement in the internship had persuaded them to apply for ITT, when they had previously been uncertain. There was therefore good support for the use of paid internships in supporting the recruitment of teachers.<sup>151</sup>

Other examples are available of local approaches that schools are taking to address recruitment issues in the local area. For example, in Bradford the establishment of the 'Bradford Talent' bank provides a 'pre-vet' service involving experienced Headteachers who are then marketed to schools using a database. This service provides comprehensive feedback to candidates on their application and interview process. Anecdotal feedback has found that Headteachers have found this approach to be very positive and it had resulted in the percentage of schools reporting recruitment issues falling from 58% to 32%.<sup>152</sup>

## 4.3 School initiatives to retain teachers in the profession

There is clear support in the literature for the role that effective professional development can play in supporting teachers' retention in the profession. As detailed in the House of Commons' Education Committee Report *Recruitment and Retention of Teachers* (2017)<sup>153</sup> 'introducing initiatives to help improve teachers' job satisfaction may well be a much more cost-effective way of improving teacher supply in the long term'.<sup>154</sup> Offering more effective, timely and subject-specific professional development opportunities was identified as one way that improvements in job satisfaction, and subsequently in retention could occur.<sup>155</sup>

Recent research (2018) has focused on levels of workload and its effect on teacher retention.<sup>156</sup> A qualitative study involving in-depth interviews with 101 former teachers identified that teacher retention is a complex issue involving a range of influencing

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<sup>150</sup> Ibid., p.22

<sup>151</sup> Ibid., p.21

<sup>152</sup> City of Bradford Metropolitan District Council (2018), *Report of the Director to the meeting of the Children's Services Overview and Scrutiny Committee to be held on 17<sup>th</sup> January 2018*, p.3

<sup>153</sup> House of Commons' Education Committee Report (2017), *Recruitment and Retention of Teachers. Fifth Report of Session 2016-17*

<sup>154</sup> Ibid., p.15

<sup>155</sup> Ibid., p.26

<sup>156</sup> DfE (2018), *Factors affecting teacher retention: qualitative investigation*



factors, although workload was identified as the ‘the most important factor influencing teachers’ decisions to leave the profession’.<sup>157</sup>

‘Teachers’ decisions to leave the profession were generally driven by the accumulation of a number of factors, over a sustained period of time. However, for some teachers, there had been a specific ‘trigger’ point, for example around teaching performance resulting in involvement from the senior leadership team (SLT), feeling undervalued after an issue had been highlighted or a specific behavioural incident involving pupils and parents/carers’.<sup>158</sup>

In addition, most of the participants in the research perceived that pay levels did not reflect their ‘expertise, experience and dedication’.<sup>159</sup> Thus, some suggestions were made by former teachers around schools offering increased salaries or other funding (e.g. for CPD) in order to help retain the existing workforce. However, it was emphasised that financial incentives were generally not a key driver in participants’ decision to leave (or return to the role).<sup>160</sup>

Regional research undertaken by the University of Oxford and Oxford Brookes University (Burn et al, 2016) specifically looked at factors that contributed to early career teachers’ decisions to stay or leave employment within the county of Oxfordshire.<sup>161</sup> The research highlighted the importance of ongoing support for teachers, beyond their NQT year to support retention; specifically mentioning ongoing mentoring for new professional responsibilities. Having clear developmental pathways associated with career progression and opportunities for informal collaboration and collegiality were also perceived by the authors as playing a vital role in supporting the retention of teachers.

There have been a number of initiatives that have focused on improving the support for teachers in shortage subjects, where retention can be more of an issue. Research by the Wellcome Trust (Allen and Sims 2017) found that science teachers were more likely to leave the profession than similar teachers in other subjects.<sup>162</sup> This was particularly found to be true for NQTs overall and particularly NQTs with physics or engineering degrees. The Wellcome Trust aimed to better understand science teacher retention and also whether subject specific CPD delivered through the National STEM Learning Network (NSLN) would impact on teachers’ likelihood to stay in the profession.<sup>163</sup> The research

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<sup>157</sup> Ibid., p.6

<sup>158</sup> Ibid.

<sup>159</sup> Ibid., p.7

<sup>160</sup> Ibid.

<sup>161</sup> Burn, K. Wild, M. Lose, E and Martin-Millward, T (2016), *Recruitment and Retention of Newly Qualified Teachers in Oxfordshire Schools: Report of research undertaken by the University of Oxford and Oxford Brookes University for the Strategic Schools Partnership Board*

<sup>162</sup> Allen, R and Sims, S. (2017). *Improving Science Teacher Retention: do National STEM Learning Network professional development courses keep science teachers in the classroom?*

<sup>163</sup> The National Stem Learning Network was set-up in 2005 with the aim of providing science teachers, technicians and other educators with subject-specific CPD. This involved face-to-face training delivered

found a clear link between involvement in subject specific CPD through the NSLN and retention in the profession – ‘the odds that an individual teacher stays in the profession the year after participating in an NSLN course are around 160% higher than similar non-participants’.<sup>164</sup> However, the report provided no evidence as to why this was the case.

Research by Gatsby (Hobson et al, 2012) explored the potential impact of external mentoring for teachers of physics and other subjects, evaluating the use of mentors within the Physics Enhancement Programme, the Science Additional Specialism Programme and the Stimulating Physics Network.<sup>165</sup> All three support programmes had a focus on building physics subject knowledge and skills through professional development, coaching and mentoring for either ITT trainees, early career teachers or more experienced teachers. The intention of the programmes was to ‘help participating trainees and teachers become effective or more effective teachers of physics, and through doing so to encourage their retention in the teaching profession’.<sup>166</sup> Specifically looking at the role of external mentoring within these programmes Gatsby found some evidence that the use of external mentors had enhanced teacher retention. Reasons for this included some mentees believing that they would have not completed their training or NQT year without support from the external mentor.<sup>167</sup>

The Stimulating Physics Network Programmes (SPN) comprised three related project strands – increasing participation, improving gender balance and developing teachers. Specifically, the Developing Teachers project aimed to provide support and professional development for teachers, including mentoring for early career teachers. The evaluation of this project (Smith et al, 2016)<sup>168</sup> found that teachers considered the support from their mentor as having a positive impact on their teaching practice.<sup>169</sup> Furthermore, the evaluation found evidence of the project improving the retention of early career teachers within teaching, with retention being 10% above the control groups after three years support.<sup>170</sup>

Other smaller scale research has also explored the factors informing teachers’ retention and also perceived successful approaches to encouraging teachers to stay in the profession. For example, *Teacher Recruitment and Retention in Yorkshire and Humber*

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through the National STEM Learning Centre at the University of York, working in partnership with nine regional and 50 school-centred local partners.

<sup>164</sup> Allen, R and Sims, S. (2017). *Improving Science Teacher Retention: do National STEM Learning Network professional development courses keep science teachers in the classroom?*, p.8

<sup>165</sup> Hobson, A.J. et al (2012). *The Nature, Impact and Potential of External Mentoring for Teachers of Physics and Other Subjects in England*

<sup>166</sup> Ibid., p.12

<sup>167</sup> Ibid., p.47

<sup>168</sup> Smith, J. Grant, A. Seymour, K. (2016). *The evaluation of the Stimulating Physics Network (SPN) Programme. Final Report for the Institute of Physics*

<sup>169</sup> Ibid., pp.24-26

<sup>170</sup> Ibid., p.13

2009<sup>171</sup> involved research with teachers (experienced and newly qualified), senior leadership team members and ITT trainees. This found that positive school ethos, opportunities for additional responsibilities or extra income and opportunities for promotion were some of the key factors that influenced their decision to stay in the profession.<sup>172</sup> Other case study examples often cited in the media highlight bespoke approaches taken by individual schools to address retention issues. For example, this may be the use of flexible working arrangements<sup>173</sup> or approaches to tackling teacher workload.<sup>174</sup> However, there is currently a lack of evaluative evidence of the effectiveness and impact of such approaches.

## 4.4 Key learnings from schools and HE recruitment and retention

- In the school sector, the use of bursaries to encourage trainees into the sector is a well-established incentive. However, research indicates differing viewpoints as to the levels of impact and efficacy of bursaries in terms of recruitment and retention into the teaching profession (as opposed to attracting individuals into training). Concerns have included the lack of guarantee that trainees will move into teaching at the end of a course, and the potential influence of additional factors on decision making such as remuneration levels across the sector.
- However, some research in the school sector also points towards the value of increasing incentives for trainees with particular attributes (e.g. qualifications, skills) to attract them into the profession. For FE, this model has recently been reflected in ETF's Maths Graduate Recruitment Incentive programme and may be worth further consideration as part of future approaches – particularly for boosting application numbers across priority/shortage subject areas.
- Non-financial incentives have also been noted as important to the school sector, with interview feedback for this study suggesting that some of these findings may also be transferrable to the FE sector. For example, since 2015, there have been some specific programmes introduced that include financial incentives to support teacher recruitment. These include ITT initiatives such as the Future Teaching Scholars programme, the Maths and Physics Chairs programme and the paid internship scheme. Although these boosted the recruitment of individuals who may not have previously considered ITT, there was less evidence as to how well these schemes impacted on longer-term retention of recruits to the teaching profession.

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<sup>171</sup> Centre for Education and Inclusion Research (2009), *Teacher Recruitment and Retention in Yorkshire and Humber 2009*

<sup>172</sup> *Ibid.*, p.11

<sup>173</sup> BBC (2017), *Long Sutton school head defends 'duvet day' incentive*

<sup>174</sup> SecEd (2017), *Shared teacher planning to reduce workload*

- Indeed, the limited evidence available appears to indicate that retention is influenced by a range of non-financial incentives, such as the provision of ongoing support and mentoring (i.e. beyond NQT), opportunities for collaboration, and the opportunity to participate in CPD, as much as it is by levels of remuneration and other financial benefits. Evidence from HE, where available, also tended to support the view that the offer of non-financial incentives was a useful approach to address retention issues. As with the school sector, these would include the provision of mentoring and CPD opportunities, although reviews of remuneration and benefits also factored in HE.
- This suggests that effective incentives for the recruitment and retention of school and HE teachers also include a package of non-financial benefits, and this may be worth considering further in the context of FE.

## 5. Evidence from public sector

In addition to learnings that can be gained from schools and HE, potential learnings from the broader public sector were briefly explored, with a small number of relevant reports or articles identified primarily from the public sector.

Evidence of the effectiveness of financial incentives in addressing recruitment, retention and skills shortages appears to be limited. A 2017 report from the Institute of Employment Studies analysed the use and effectiveness of market pay supplements and recruitment and retention payments across the Pay Review Body Groups and wider public sector.<sup>175</sup> The report included a rapid evidence review of relevant literature and a number of case studies across different public sector occupations. It identified very little quality academic research on the role or effectiveness of financial incentives.

The report noted that where research does exist, the effectiveness of financial payments in influencing recruitment and retention in the long-term were not universally successful. The report identified a large body of primarily American private sector evidence showing the role of pay incentives in retaining staff in an organisation.<sup>176</sup> However, it also cited numerous studies from the UK and internationally, across teaching, defence and healthcare, which showed that the effectiveness of financial incentives can be short-lived, primarily having an impact on initial recruitment but limited impact on retention. The report highlighted that both financial and non-financial incentives are required, utilising both extrinsic and intrinsic rewards to allow for flexibility and tailoring to meet individuals' needs.<sup>177</sup> These findings were mirrored in the public sector case studies.

The report concluded that despite wide variations in the contexts, settings and aims of the incentives, there are some factors that support the effective use of such payments, including: areas of severe, long-term and evident staff shortages, supplementing national pay structures where there is limited flexibility to reflect market differences, a clearly defined target population, specific goals of usage and close monitoring and review. In the context of the FE sector, it would be important for the introduction of market supplements or skills supplements to be appropriately targeted and monitored to fully understand their value in attracting and retaining staff in the sector.

Similarities can be drawn between the recruitment and retention issues experienced within healthcare and education. A European Commission report on *Recruitment and Retention of the Health Workforce in Europe (2015)* noted that balancing the skills and number of healthcare staff required to meet the varied and changing needs of

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<sup>175</sup> Brown, D., Reilly, P. and Rickard, C (2017), *Office of Manpower Economics: Review of the Use and Effectiveness of Market Pay Supplements—Project Report*

<sup>176</sup> For further international public sector evidence, see as an example: University of California Center for Effective Global Action (2011), *The Role of Financial Incentives in Recruiting Public Sector Employees*

<sup>177</sup> *Ibid.*, pp.24-27

geographical populations is a challenge faced by most EU countries.<sup>178</sup> The healthcare industry is also facing a similar issue of increasing urgency, as the health workforce shrinks and current workers retire.

The report highlights a number of factors for recruitment and retention in healthcare, some of which could be useful to consider within the context of recruitment and retention in FE:

- Different factors influence recruitment compared to those that influence retention as the decision to take up a post is made outside of the setting, whereas the decision to stay is based on different factors related to the experience of living and working there.
- The needs of individuals vary from person to person, and also over the course of their career, based on their circumstances. Furthermore, different settings have different contexts and therefore different needs, therefore recruitment and retention strategies need to be flexible to meet these varied needs.
- Financial incentives are important, but effectiveness is limited if not combined with other measures and there is no 'one size fits all', hence a mix of interventions should be offered for maximum impact.
- Drivers that address the intrinsic motivations play an important role in recruitment and retention, particularly where financial motivators are not available or sufficient.  
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- Tackling recruitment and retention requires both short-term action and longer term planning, with work put in place to ensure there are no future shortages.<sup>180</sup>

Another review considered international evidence of the impact of financial incentives on public sector workers' job performance motivation and in attracting better candidates (Deseranno, 2017). The analysis found that whilst financial incentives can help with recruiting more qualified staff and motivate them once in the role, other non-financial methods such as social recognition, non-financial rewards and emphasis on social benefits can be as effective as and cheaper than financial incentives.<sup>181</sup> For example, the review quoted research by Ashraf et al (2014) which compared financial incentives with social rewards for agents distributing contraception in Zambia. The research found that offering social rewards almost doubled agents' performance, compared to offering financial incentives.

The challenges faced by the education sector are also reflected in the high level of staff need in the social care sector. An October 2017 article by Sharon Allen, Chief Executive

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<sup>178</sup> Barriball L et al (2015), *Recruitment & Retention of the Health Workforce in Europe*

<sup>179</sup> Ibid., pp.14-17

<sup>180</sup> Ibid., p.44

<sup>181</sup> Deserranno, E. (2017), *Financial Incentives in the Public Sector*

of Skills for Care, highlighted the recruitment and retention challenges faced in the social care sector: 90,000 staff vacancies on any given day, an average staff turnover of almost 28% and an anticipated need of 275,000 new job roles to be filled in under ten years.<sup>182</sup> However, it is clear that some social care employers are more successful at addressing recruitment and retention than others, with around one quarter having turnover of less than 10%.<sup>183</sup>

To gain a better understanding of what works to recruit and retain staff, Skills for Care conducted research with employers to explore what they felt contributed to their success.<sup>184</sup> The research identified aspects of their success which may have some relevance to the education sector:

- Attracting and taking on the right people with the right values, behaviours and attitudes is essential and more important than finding staff who are already qualified: skills can be taught, but personal attributes cannot.
- Promoting the wider benefits of the sector, such as flexible working.
- Investing in staff based upon their development needs, not as a 'tick box exercise', and include formal training, mentoring and support.

The themes identified in these reports link well with theories arising from motivational psychology. An online article from Deloitte Insights argued that human resources strategies should be based on the insights and evidence-based practice emerging from behavioural economics.<sup>185</sup> It suggested that many traditional human resources practices are based on the incorrect idea that people are motivated by money and positional power, or extrinsic motivations. However, the article argued that there is evidence to show that 'it's intrinsic motivation that matters: the desire to do a job for its inherent rewards' and that financial incentives can have an opposing effect on motivation and performance.<sup>186</sup> The article concluded that applying proven principles of behavioural economics to recruitment and retention programmes will make them more effective and efficient and that human resources strategies should be tested and evaluated to understand what best motivates their workforce. In particular the article suggested that human resources should 'embrace a behavioural insights movement of its own founded on three premises that correspond to the major themes of behavioural economics' these being:<sup>187</sup>

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<sup>182</sup> Skills for Care is an independent registered charity and the strategic body for workforce development in adult social care in England

<sup>183</sup> Allen, S. (31<sup>st</sup> October 2017), 'Valuing the social care workforce', The Heath Foundation

<sup>184</sup> Skills for Care (2013), *Why are some employers more successful than others in retaining their workforce?*

<sup>185</sup> Behavioural economics is a method of economic analysis that applies psychological insights into human behaviour to explain economic decision-making

<sup>186</sup> Guszczka, J., Bersin, J., Schwartz, J. (2016), *Deloitte Insights Review Issue 18: HR for Humans: How behavioral economics can reinvent HR*

<sup>187</sup> *Ibid*, p.104

- **Play moneyball** (bounded rationality) – increase human resources focus on data-driven scientific recruitment methods (e.g. building predictive models using historical recruitment data), rather than unstructured interviews and too much focus on the employer’s intuition.
- **Nudge your colleagues** (bounded willpower) – based on the premise “everything matters” in the way environments affect our behaviours, we can intentionally design those environments in ways that prompt-nudge people to take the short-term actions that are consistent with their long-term goals”.<sup>188</sup> For example, the article suggested that human resources could be going beyond its traditional roles to test ‘choice architecture’ to promote employee wellness e.g. through applying this to choices around employee benefits.
- **Leverage intrinsic motivation** (bounded self-interest) – based on the premise that individuals are motivated by factors other than economic self-interest. Suggests that intrinsic motivation is characterized by the desire to achieve *mastery* (e.g. through the creation of a learning culture within a workforce), *autonomy* (by giving individuals the opportunity for creativity and innovation in their jobs) and *purpose* and this could be considered by human resources departments in better understanding what motivates their workforce.

## 5.1 Key learnings from industry

- Evidence of the effectiveness of financial incentives in addressing recruitment, retention and skills shortages across public sector occupations more broadly appears to be limited.
- Some research has shown that the impact of financial incentives can be short-term, in that they can help to increase recruitment levels but not longer-term retention rates. This supports the evidence emerging from the HE and school sectors, also.
- Again, as with schools and HE, packages that combine both financial and non-financial incentives appear to be effective in addressing recruitment and retention, with a specific note from wider public sector professions that being able to be flexible and tailor incentives/rewards to individuals was a useful approach. The ability for institutions to offer bespoke incentive packages may be worth considering further in the context of FE, particularly in subject areas where individuals are being recruited from industry.

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<sup>188</sup> Ibid., p.111



- The healthcare sector currently faces a similar issue of urgent recruitment needs, with research among this sector's workforce again emphasising that recruitment and retention should be approached differently in terms of the incentives offered. Thus, from broader occupational sectors – based on limited evidence – it appears that the effectiveness of different incentive types may vary among individuals according to career stage, settings, contexts and experience. The concept of providing a model whereby providers can be both flexible in approach to incentivisation, and in how they combine types of incentive (financial and non-financial), may therefore warrant further scrutiny in an FE context.

## 6. International evidence of teacher recruitment and retention initiatives

The challenge of recruiting and retaining teachers into schools and FE institutions is one not only experienced in the UK but in many other countries too. Countries both within and outside of Europe are experiencing teacher shortages, disparities in the quality of teaching and significant difficulties getting teachers to work and stay in hard-to-staff schools. Countries such as: the USA, Canada, Australia, Germany, Finland, Norway, Singapore and Japan have all implemented strategies to try and address the problem.

In 2017, the Department for Education published the report *Funding and expenditure in post-16 education: An international review*.<sup>189</sup> The report comprised a rapid evidence review which aimed to provide a better understanding of post-16 funding structures and expenditure arrangements in countries with systems which closely aligned with reformed arrangements in England (Denmark, France, Germany, the Netherlands and Norway). Vocational training in these countries was noted as being primarily state funded and the level of funding is mainly based on assumptions of the costs of courses rather than intended as an incentive to promote different courses. Generally students were able to enrol on whatever course they wished to, although it was noted that some programmes had limited places to align with labour market needs.<sup>190</sup> Whilst the report did not discuss the use of financial incentives or bursaries to encourage students to enter the teaching profession, it concluded that all the countries included in the review acknowledged that additional funding will be required in the coming years to improve the recruitment and retention of vocational teachers.<sup>191</sup>

Most of the initiatives identified appear to work across both schools and FE. Initiatives introduced have both been financial and those aimed at personal development and teacher support, with varying degrees of success. It is difficult to ascertain the effectiveness of many of the initiatives due to a lack of formal evaluations and data. However, evidence from the literature suggests that the most effective approaches appear to be those that have been implemented as part of a wider strategy. Most effective is a strategy that does not simply focus on solutions for immediate recruitment or retention problems, but also looks to address ways of making teaching an attractive profession in the long-term to support retention.

In Finland for example there is a combination of strategies in place: financial incentives are used to encourage students into school teacher training, all training is provided free of charge and students also receive additional financial aid to help when studying. Furthermore, on graduation teachers are given significant levels of support in their first

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<sup>189</sup> Greatbatch, D. and Tate, S. (2017), *Funding and expenditure in post-16 education: An international review*

<sup>190</sup> *Ibid.*, pp.84-85

<sup>191</sup> *Ibid.*, p.90

post, alongside protected time within the timetable each week to learn from and plan lessons with colleagues.<sup>192</sup> Thus, supporting new teachers is a key focus within the schools in Finland.

In Japan, to help develop school teacher experiences and support teaching quality the Government has introduced a teacher rotation system across schools called Tenkin. Within this system new teachers are posted to a new school after four years, and after that, teachers are rotated to a new school every six years.<sup>193</sup> To support each move, teachers are given generous subsidies and a formal introduction to their new area; they also have mentoring and professional development. The strategy has been implemented to try and ensure all schools have good quality teaching, and by moving teachers to new roles it is hoped that the workforce within each school is then revitalised.

An important feature of the Japanese system is that they also post teachers who need to improve to successful schools with strong teaching skills; alongside posting good quality teachers to schools that need extra help. However, evaluations of the system have found that just moving around good teachers is not enough to make a significant impact because the same amount of talent is merely distributed in a different way.

To have a long-lasting impact on the teaching quality across the country a system needs to be in place that supports teachers to learn from one another.<sup>194</sup>

The following case studies are focused on three geographical locations to illustrate their efforts to try and rectify recruitment and retention issues: Northern USA and Canada, Australia and Germany.

## 6.1 Case study: Northern USA and Canada

Northern USA and Canada are experiencing severe shortages of teachers in some hard-to-staff subjects such as mathematics and science, and in schools and FE institutions in geographical areas that are particularly rurally isolated or located in economically deprived urban communities.

Rural communities face limitations in recruiting and retaining high-quality teachers for reasons such as: funding issues, a lack of rigorous training and certification options available, and geographic and social isolation.<sup>195</sup>

Schools and FE institutions in economically deprived urban areas tend to serve a high proportion of low-income students and have a history of poor management and low

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<sup>192</sup> The Guardian (2016), *Recruitment lessons; how Japan and Australia attract teachers into rural schools*

<sup>193</sup> Ibid.

<sup>194</sup> Ibid.

<sup>195</sup> Education Commission of the States (2016), *Recruiting teachers to rural areas*, p.1

student achievement, which is not an attractive employment prospect for most teachers.<sup>196</sup>

Over the last ten years a number of initiatives have been introduced to try and relieve the problem. They include financial benefits such as: bonuses for hard-to-fill subjects, loan forgiveness, tuition reimbursement, and assistance with relocation and housing costs. Other approaches include the simplifying of the qualification process to make it easier and quicker for students to become teachers if they agree to work in hard-to-staff schools and colleges, and the lifting of restrictions for retired teachers who have been given the opportunity to return to teaching but can still receive their pension.<sup>197</sup>

Some authorities have also tried alternative recruitment methods such as building relationships earlier with prospective teachers. One such example was in Detroit, where the talent acquisition manager for the district held a recruitment event inviting students from a nearby university. They were invited to a restaurant for lunch, for dinner and a visit to the Urban Institute for Contemporary Art and Gerald R. Ford Academic Centre. The aim of the event was to connect early with prospective teachers, with the hope that they would then consider the district's schools and colleges as a destination for their first teaching role.<sup>198</sup>

Other education districts have tried to encourage people to enter teaching by implementing marketing initiatives designed to increase interest in the profession. For example, the District of Columbia Public Schools created a dedicated website for recruitment.<sup>199</sup>

Marketing on its own does not appear to be enough to encourage teachers to choose to teach hard-to-fill subjects, or within challenging areas and institutions. Evidence suggests that there is widespread use of financial incentives to encourage both new teachers and those already in the profession to accept jobs that they otherwise might not be inclined to accept. Research by Hanover (2016) on the use of financial incentives reported that they can help to increase the size and quality of teacher applicant pools in specific education districts.<sup>200</sup> In 2013, there was an investigation into the impact of the Quality Teacher and Education Act of 2008 on teacher recruitment and retention in the San Francisco Unified District. The programme provided in hard-to-staff schools:

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<sup>196</sup> North Carolina LEA Case Study (2007), *Regional specific incentives for teacher recruitment and retention*, p.8

<sup>197</sup> ASCD (2008), *What Research Says About Teacher Recruitment Incentives*

<sup>198</sup> Detroit Free Press (2017), *Recruiting teachers in Michigan: Vacancies lead to wining and dining, incentives*

<sup>199</sup> Hanover Research (2016), *Best practices in teacher recruitment: preliminary review prepared for California County Superintendents*, p.24

<sup>200</sup> *Ibid.*, p.17

- An overall salary increase for teachers of \$500 (£355) - \$6,300 (£4,455)<sup>201</sup>.
- A \$2,000 (£1,415) bonus for teachers.
- Retention bonuses of \$2,500 (£1,768) after the 4th year of teaching and \$3,000 (£2,120) after the 8th year of teaching.

The investigation identified that the salary incentives increased the size and the quality of teacher applications. Before the policy was introduced, 27% of applicants were in the targeted high-quality teaching category and after this it had risen to 37%, representing a significant change.<sup>202,203</sup>

Another effective example identified in the Hanover Research was the Talent Transfer Initiative which took place in seven districts over the 2009-2010 academic year. Top quality teachers in high-performing schools and colleges were identified and offered the chance to transfer to a low-performing school or college in their district for \$20,000 (£14,140) paid over a two-year period. The initiative also rewarded top teachers already working in under-performing schools or colleges, who were offered a \$10,000 (£7,070) retention bonus paid over two years.

The research found that of the 1,000 teachers identified and 70 vacant positions, 63 teachers took up the positions, demonstrating that talented teachers could be enticed to teach in low-performing schools and colleges by financial incentives.<sup>204</sup>

Research by Springer, Swain, and Rodriguez (2016) as detailed in The Hamilton Project (2017) report,<sup>205</sup> found a program in Tennessee that paid a \$5,000 (£3,554) bonus to highly rated teachers in low-achieving schools was a cost-effective way of retaining teachers and increasing student achievement. The costs of the Tennessee retention bonus were compared to other interventions such as summer schools and reductions in class sizes and concluded that the bonus was relatively more cost-effective.<sup>206</sup>

Interestingly financial incentives do not always appear to be effective. One such example was in Massachusetts where prospective school and college teachers were offered an accelerated path to qualification and a \$20,000 (£14,140) bonus over four years as an enticement to stay in the position. Research by ASCD (2008), reported that the recipients felt the bonus had little influence on their decision to enter teaching, but the fast track to qualification was an incentive. Neither incentive, however, kept them in Massachusetts

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<sup>201</sup> Currency conversion based on 0.71 pounds to the US dollar (28.3.18)

<sup>202</sup> Hanover Research (2016), *Best practices in teacher recruitment: preliminary review prepared for California County Superintendents*, p.17

<sup>203</sup> By contrast, the evidence base for the UK FE incentive programmes identified focused on bursaries or awards rather than salary increases, therefore it is difficult to make comparisons of effectiveness versus the UK

<sup>204</sup> *Ibid.*, p.19

<sup>205</sup> The Hamilton Project (2017), *Understanding and Addressing Teacher Shortages in the United States*

<sup>206</sup> *Ibid.*, p.10

public schools or colleges, as before receiving the full four year bonus, eight of the 13 participants had left.<sup>207</sup>

In the state of North Carolina (2004-2011) school teachers were offered an annual bonus of \$1,800 (£1,270) to encourage them to teach mathematics and science in low-income or low-performing schools. Research by ASCD (2008), found that the complexity of the incentive programme for teacher eligibility and the low value of the bonus was not sufficient to encourage teachers to the most economically deprived schools. It stated that the incentives could not compensate for the lack of support they encountered in the schools, which in turn contributed to the departure of many of the teachers.<sup>208</sup>

To aid retention North Carolina also increased salaries for new and experienced school and college teachers, which was previously lower than other states. They also implemented a 12% salary increase for teachers who obtained National Board Certification.<sup>209</sup> This certification required that teachers submitted a portfolio that included: video footage of their teaching of standards-based lessons, teaching reflections, lesson plans, and their impact on student learning. This incentive resulted in the state having the largest percentage of National Board Certified teachers in the country (20% of its teaching force) and an increase in overall student achievement.<sup>210</sup>

Another example of a financial incentive is loan reimbursement. Some states encouraged entrance to the teaching profession in schools and colleges by offering loan repayment programmes. These were designed to decrease financial barriers to training, and to encourage students to work in specific geographical areas or for current teachers to stay in the profession longer. The Florida Critical Teacher Shortage Program repaid student loans if they continued teaching in a critical shortage area. Up to \$2,500 (£1,768) per year for four years was available. The fund also provided a bonus of up to \$1,200 (£848) to new and experienced teachers in shortage areas. Evidence gathered by SPREE (2015), suggested that this programme decreased teacher attrition in the areas by 25%, however, teachers tended to be of lower quality and less experienced than non-participants.<sup>211</sup>

The provision of housing has also been used as an incentive. The Hertford County Housing Project aimed to recruit highly qualified school teachers to rural counties by providing affordable rental housing for teachers. In 2006 new housing was built in the area and rights to rent the property were exclusively given to teachers. Rental rates were

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<sup>207</sup> David, J.L. (2008); 'What Research Says About Teacher Recruitment Incentives', Educational Leadership, Volume 65, Number 7, ASCD, pp.84-86

<sup>208</sup> Ibid., pp.84-86

<sup>209</sup> Colorado Department of Higher Education (2017), *Teacher Shortages Across the Nation and Colorado Similar Issues, Varying Magnitudes*, p.37

<sup>210</sup> Ibid.

<sup>211</sup> SPREE Spring 2015 Conference (2015); *Financial Incentives to Promote Teacher Recruitment and Retention: An Analysis of the Florida Critical Teacher Shortage Program*, p.2.

charged at below-market rates.<sup>212</sup> Evaluation of the effectiveness of this initiative was not available.

In addition to financial incentives, other types of initiative are also evident in Northern USA and Canada. These include the reformation of teacher qualifications and the provision of additional support to help retain those that are newly qualified or experienced in the profession.

Research by Hanover (2008) found that some states encouraged people into the teaching profession by reforming school and FE teacher qualifications.<sup>213</sup> They offered the opportunity to become qualified without completing full traditional courses; this allowed individuals to enter the profession that might otherwise find qualifying too time intensive or costly.

The provision of good levels of support via mentoring and induction programmes for newly qualified school teachers was reported by ASCD (2008), as being one of the ways in which teacher retention could be improved. They stated that 'retaining good teachers is an even bigger problem than getting them into challenging schools in the first place'.<sup>214</sup> ASCD's research concluded that the most important reason first-year teachers choose to stay was job satisfaction and that the most important factors in job satisfaction were social support and school management. They also found that schools that provided teachers with more autonomy, administrative support, mentoring and induction programmes had lower levels of teacher turnover.<sup>215</sup>

Another example of support for newly qualified school and college teachers was the creation of Teacher Centres, aimed at guiding teachers through the qualification process and providing ongoing support. An example is the Mississippi Teacher Centre, whose website provides links and information for support but also advertises roles in teacher shortage areas and promotes scholarships and loan forgiveness schemes.<sup>216</sup>

Overall the literature suggests that financial compensation alone in Northern USA and Canada is not a sufficient motivator to encourage people into the profession or to encourage them to stay. Evidence suggests that other factors such as poor leadership and a lack of support can also be attributed to the shortage of teachers that currently exists.

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<sup>212</sup> North Carolina LEA Case Study (2007); *Regional specific incentives for teacher recruitment and retention*, p.3

<sup>213</sup> Hanover Research (2016); *Best practices in teacher recruitment: preliminary review prepared for California County Superintendents*, p.8

<sup>214</sup>David, J.L. (2008); 'What Research Says About Teacher Recruitment Incentives', *Educational Leadership*, Volume 65, Number 7, ASCD, pp.84-86

<sup>215</sup> *Ibid.*, pp.84-86

<sup>216</sup> SPREE Spring 2015 Conference (2015); *Financial Incentives to Promote Teacher Recruitment and Retention: An Analysis of the Florida Critical Teacher Shortage Program*, p.24

## 6.2 Case study: Australia

Australia is experiencing significant problems in the provision of good quality schooling. The country's geography makes recruitment particularly difficult, as many communities are located in isolated rural areas (e.g. a three-hour flight from a city), and therefore filling teaching posts within these areas with qualified and experienced teachers is challenging. The House of Representatives Committees (2005) reported that most of the Northern Territory's teachers were imported from other states and the retention rate of teachers in these remote areas was only around six to seven months.<sup>217</sup>

All states in the Northern Territory have policies in place offering financial and non-financial incentives to teach in schools and colleges in rural and remote communities. These incentive packages include: housing subsidies of 70-100%, retention benefits if teachers stay in rural schools beyond a certain number of years, holiday travel expenses (including three flights per year) and an 'isolation from goods and services' allowance.<sup>218</sup> Funds are also available for schools to offer to pay off teaching loans, to provide additional holiday days and an isolation allowance of \$1,200 (£650)<sup>219</sup> per year.<sup>220</sup> For example, Western Australia offers teachers moving to remote locations additional allowances of up to \$20,000 (£10,856) per year and half a year of long service leave after four years of teaching.<sup>221</sup>

A further example is the Student Teacher Bursary Scheme which was introduced to the Northern Territory in 2002. The aim of the bursary was to encourage students to teach in schools and colleges in remote areas and in some subject shortage areas, such as mathematics, science, special education, ESL and IT. The bursary was worth \$12,000 (£6,514) per year for the duration of the course. Some positive effects of the bursary were reported at the time. At the end of 2002, five of the first 20 bursary holders had graduated and of these five, three had been permanently placed in Darwin schools, one was working for a private college in Alice Springs and one was moving interstate.<sup>222</sup>

The state of Victoria, as part of the Victorian Government's Excellence in Teacher Education reforms offer a number of initiatives to improve the quality of school and college teaching and encourage teaching in remote areas. There is not any documented evidence as to the effectiveness of these programmes.

The Rural Scholarship Programme offers one-off financial support to rural and disadvantaged students who want to do a teaching qualification. Students are provided with \$3,000 (£1,628) upon signing the Scholarship Agreement and then a further \$2,000

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<sup>217</sup> House of Representatives Committees (2005), *Teaching Indigenous languages*, p.15

<sup>218</sup> The Guardian (2016), *Recruitment lessons; how Japan and Australia attract teachers into rural schools*

<sup>219</sup> Currency conversion based on 0.54 pounds to the Australian dollar (28.3.18)

<sup>220</sup> Australian Council for Educational Research ACER (2003), *Initiatives to address teacher shortage*, p.19

<sup>221</sup> The Conversation (2015), *How can we recruit more teachers to work in rural schools? The health sector could have the answer*

<sup>222</sup> Australian Council for Educational Research ACER (2003), *Initiatives to address teacher shortage*, p.19



(£1,085) upon provision of evidence of enrolment in an undergraduate teaching course.<sup>223</sup>

The Student Teacher Rural Practicum Placement Programme provides financial incentives for pre-service teachers to experience a placement in a rural Victorian government school, the aim of which is that they will have a positive learning experience through this placement that may encourage them to apply to a similar school.

The New Graduate Incentive Programme offers financial assistance for schools experiencing difficulty attracting high-quality graduate teachers to teach in rural schools and difficult-to-recruit curriculum areas. Schools can promote the incentive as part of the employment package when advertising vacant positions. Incentives up to \$11,000 (£5,971) are available to schools to enable them to provide new graduates with a cash payment as part of an offer of ongoing employment.<sup>224</sup>

The state of New South Wales (NSW) also offers financial incentives such as the Deferred Salary Scheme which gives teachers in schools and colleges the opportunity to put aside part of their salary to fund a one year sabbatical, allowing them time for continued professional development, postgraduate study or simply a long holiday. NSW also offers one of the country's highest teacher salaries: in 2013 newly qualified teachers started on \$59,706 (£32,410) and most experienced teachers were earning \$89,050 (£48,339).<sup>225</sup>

The main problem however, is such financial incentives have limited effectiveness because the factors against moving to rural areas in Australia are so significant that they do not outweigh the attractiveness of the financial incentive. Another issue associated with financial rewards is that ineffective teachers may be just as likely to be attracted as effective teachers, which does not help to improve the overall quality of teaching.<sup>226</sup>

One of the alternatives used to financial incentives and a way to combat the barriers to attracting teachers to work in remote areas is 'The Local Teachers in Local Schools' initiative. By encouraging local indigenous students to become teachers 'The Local Teachers in Local Schools' initiative combats the need to try and financially encourage teachers from more populated areas to live and teach in remote rural ones. The initiative encourages them to initially stay at school longer and then to consider a career in teaching. The main idea behind the initiative is that indigenous teachers will remain in

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<sup>223</sup> Victoria State Government Education and Training (2018), *Teaching Incentives, Scholarships and Financial Help*

<sup>224</sup> Ibid.

<sup>225</sup> NSW Government Education (2017), *Benefits and Incentives*

<sup>226</sup> The Conversation (2015), *How can we recruit more teachers to work in rural schools? The health sector could have the answer*

their communities to teach, providing communities with some continuity in qualified staff who can speak the first language.<sup>227</sup>

Another way of encouraging teaching within schools and colleges in rural areas without the use of incentives and to reduce the perceived professional isolation of teaching in a rural community, was the Beyond the Line program. This was initiated in 2002 by the NSW Department of Education and Training in partnership with local universities.<sup>228</sup> The five day programme gave teachers a taste of teaching and living in rural NSW areas, the key aim was to provide 'a snapshot of a rural teacher's life, first-hand experience of country hospitality and the chance to discover more about country areas that hold the greatest number of employment opportunities'.<sup>229</sup> In 2006 this was superseded by the 'Over the Hill' project that involved six days spent within rural areas. Those that took part positively viewed it as a 'valuable and authentic teaching experience, that would position them well for future career choices and expanded their knowledge of teaching in remote settings'.<sup>230</sup>

Other non-financial initiatives include those that focus on strengthening the skills of teachers to be able to cope with the demands of working in more challenging areas and schools/colleges. The National Exceptional Teaching in Disadvantaged Schools Program is an example of this. This programme selects high-quality teacher trainees and provides them with targeted coursework and practice placements in disadvantaged schools. It was reported that 90% of these trainees went on to accept a teaching job in a disadvantaged school.<sup>231</sup>

A further example is Teach for Australia, a programme designed to attract high achieving graduates, young professionals and career-changers, to work in Victorian government secondary schools and colleges serving disadvantaged communities. In addition to all accommodation and meals being provided free of charge for the two-year duration of the course, there is a big focus on mentors to support the students throughout.<sup>232</sup> Students are given time for one-to-one sessions with mentors, receiving help with practical teaching issues and both students and mentors work together to ensure the course is challenging but enjoyable.

Literature suggests that in Australia a combination of both financial incentives and those focused on developing skills and supporting teachers in their role are most effective in recruiting and retaining teachers.

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<sup>227</sup> Ibid.

<sup>228</sup> Beutel, D, Adie, L & Hudson, S (2011), *Promoting rural and remote teacher education in Australia through the over the Hill project*. International Journal of Learning, vol. 18, no. 2

<sup>229</sup> Ibid., p.380

<sup>230</sup> Ibid., p.383

<sup>231</sup> The Conversation (2015), *How can we recruit more teachers to work in rural schools? The health sector could have the answer*

<sup>232</sup> Victoria State Government Education and Training (2018), *Teaching Incentives, Scholarships and Financial Help*

## 6.3 Case study - Germany

The teaching sector in Germany experiences relatively high levels of recruitment and retention partly due to salaries which are competitive both internationally and in relation to other jobs in Germany that require similar qualification levels.<sup>233</sup> The average annual salary of an upper secondary school teacher with 15 years' experience in Germany is \$78,579 (£55,562), with an average starting salary of \$61,589 (£43,549). This gives German teachers one of the highest salaries in the OECD, second only to Luxembourg.<sup>234</sup>

A general incentive for German graduates considering a career in teaching is the 'civil service status' of teachers which promotes a relatively good wage, pension scheme and job security.<sup>235</sup>

As well as wage and pension benefits, 'civil servant status' in Germany provides a regulated retirement age of 65 (with options for earlier retirement). The German civil service wage is also supplemented by further remunerations such as child and family allowances.<sup>236</sup>

German teachers experience substantial job security and can only be dismissed under 'extraordinary circumstances'. Underperforming teachers may be 'required to undergo further training or to move to a different school but dismissal usually proves impossible'.<sup>237</sup> Trainee teachers are also provided with comparably generous benefits. Known as 'probationary civil servants' trainees receive around half of the wage, family and holiday allowances that teachers with full civil servant status receive. The relative flexibility of the teaching profession in Germany could also be perceived as a further incentive for choosing teaching as a career. Nearly half of teachers in German primary schools work part-time and 96% of primary school teachers are female.<sup>238</sup>

Watt et al (2012) focused on a sample of German students undergoing teacher training who were asked about their motivations for becoming a teacher.<sup>239</sup> The students agreed that teaching in Germany was a 'well-paid profession' when compared with future teachers from Norway, Australia and the United States. However, despite the motivation of high salaries for teachers in Germany, the students felt that teaching had a low status as a profession. One explanation for the perceived low status of teaching in Germany is the 'PISA-shock' caused by much lower than expected international PISA study results in

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<sup>233</sup> Halász, G., Santiago, P., Ekholm, M., Matthews, P., & McKenzie, P. (2004), *Attracting, developing and retaining effective teachers*. Country note: Germany

<sup>234</sup> OECD, 2015 <https://data.oecd.org/eduresource/teachers-salaries.htm>

<sup>235</sup> Rotte, R. (2006), *International perspectives on education policy*

<sup>236</sup> Halász, G., Santiago, P., Ekholm, M., Matthews, P., & McKenzie, P. (2004), *Attracting, developing and retaining effective teachers*. Country note: Germany

<sup>237</sup> Ibid.

<sup>238</sup> Ibid.

<sup>239</sup> Watt, H. M., et al (2012), *Motivations for choosing teaching as a career: An international comparison using the FIT-Choice scale*. *Teaching and teacher education*, 28(6), 791-805.

2003. As a result of this 'shock', teaching in Germany had been viewed with less prestige as a profession.

A 2017 paper from the German Centre for Higher Education (CHE) assesses a serious shortage of new teachers in vocational education in Germany.<sup>240</sup> This shortage could be explained by the declining prestige of the German teaching profession but can also be attributed to the ageing teaching population in German vocational schools. Around half of all vocational teachers in Germany are over the age of 50 and therefore set to retire in the next ten to 15 years, which could trigger serious teacher shortages. The problem is exacerbated by the length of teacher training in Germany, which can take up to seven years, making it difficult to quickly readdress the anticipated shortage.

Engineering is currently facing particular teacher recruitment issues and shortages in Germany. Despite aforementioned high teacher salaries, the nature of the engineering sector, which offers particularly good job and wage prospects, means that those with an engineering degree are unlikely to go into teaching. This problem however isn't present in other areas of vocational education such as administration and health and social care, whereby teaching is viewed as a more attractive career option for graduates.<sup>241</sup>

In a bid to tackle the shortage of teachers in specific subjects in Germany, the education system has developed to allow for recruitment of individuals with no formal teacher training into a teaching role. Known as 'side-entrants' to teaching, individuals with experience in industry or a particular vocational subject can now undertake paid employment as a teacher before they have completed any teacher training. Several German regions or 'Länder' have developed policies to fill shortages with 'side-entrants'. This policy has also been beneficial to schools and colleges through increasing the subject-specific skills and experience of teachers. 'Side-entrant' teachers are often employed on a fixed term contracts meaning that the 'system is not committing itself long-term to those individuals who do not adapt well to school needs'.<sup>242</sup> A 2004 OECD review team collected 'very positive accounts from teachers and school principals about their experience with 'side-entrants', in particular in vocational schools'.

Despite the relative success of 'side-entrant' teachers in filling vacancies, CHE have proposed some shortcomings of relying on this policy. This includes the current failure to address the problem of teaching not always being a financially competitive alternative, particularly for those from the engineering profession. CHE therefore propose that more attractive incentives are offered to those who are 'side-entrants'. Many teachers in vocational schools are much older than those teaching in general education schools and have started their teaching career after several years of experience working in industry.

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<sup>240</sup> CHE (2017) *Attraktiv und zukunftsorientiert?! –Lehrerbildung in den gewerblich-technischen. Fächern für die beruflichen Schulen*

<sup>241</sup> Ibid.

<sup>242</sup> Halász, G., Santiago, P., Ekholm, M., Matthews, P., & McKenzie, P. (2004), *OECD: Attracting, developing and retaining effective teachers. Country note: Germany*

CHE recommend that financial consideration is given to the years of practical experience before entering the teaching profession, to ensure that those who become teachers later on in their career would not be taking a significant decrease in salary.<sup>243</sup>

Due to the low numbers of young people choosing to become teachers in vocational subjects, some Länder have set up programmes to increase the take up of vocational teacher training courses. In Nordrhein-Westfalen the 'Teach Future' project was developed in 2013 by the Ministry of Education and Training (MSW), with the support of the Ministry of Innovation, Science and Research (MIWF), Representatives of Business Associations, Vocational Colleges and Universities of Applied Sciences, as a joint initiative to improve sustainability of teacher provision at vocational colleges.<sup>244</sup> This project is targeted at high school students, aiming to make them more aware of available teacher training courses (particularly in the fields of mechanical engineering, electrical engineering, vehicle technology, health/nursing and social education). The project provides young people with mentoring opportunities and insights into the teaching profession at vocational colleges, including spending time in vocational schools and learning about earning potentials and career opportunities.

Volker Meyer-Guckel, Deputy Secretary General of Stifterverband (a business community initiative advocating long-term improvement of German education) believes that "there is an urgent need for the federal states, higher education institutions, associations, schools and companies to implement sustainable measures and undertake joint efforts to recruit more well-trained teachers for vocational schools".<sup>245</sup>

Overall, the literature for Germany suggests that opening teacher recruitment to those without formal teacher training has had some positive outcomes for recruitment and retention. However, there remain concerns that teaching is not seen as a financially competitive profession (at least in comparison to some sectors) and that take-up of vocational teacher training remains low.

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<sup>243</sup> CHE (2017), *Attraktiv und zukunftsorientiert?! –Lehrerbildung in den gewerblich-technischen. Fächern für die beruflichen Schulen*

<sup>244</sup> Teach Future (2017):

<https://www.schulministerium.nrw.de/docs/LehrkraftNRW/Arbeitsmarkt/TeachFuture/index.html>

<sup>245</sup> Stifterverband: <https://www.stifterverband.org/>

## 6.4 Key learnings from international education examples

- Drawing from evidence across four countries, teacher recruitment and retention programmes appear to draw on a combination of financial and non-financial incentives, with varying degrees of success. Financial incentives introduced internationally over the last ten years have included: bonuses for hard-to-fill subjects, loan forgiveness, tuition reimbursement, and assistance with relocation and housing support.
- However, whilst several incentive programmes have been identified through this review, evidence of the success and impact of these schemes and packages is particularly scarce. This highlights the importance of embedding evaluation activity into future activities, so that meaningful, robust and informative data can be collated around impact, effectiveness and value for money.
- Notably, the majority of incentive packages identified tended to be delivered across both the school and FE sectors; few are tailored specifically to recruitment and retention in FE, suggesting a potential need to promote FE more widely as a sector in its own right with an identity distinct from schools.
- The literature suggested that financial compensation may not be a sufficient motivator to encourage teachers to enter or remain in the profession across each of the four countries. For example, Germany provides a 'civil service status' for teachers which brings with it financial incentives of a relatively good wage, pension scheme, job security, a regulated retirement age of 65 (with options for earlier retirement) and wage supplements. However, recruitment into vocational teaching remains low. Evidence in the USA and Canada suggested that wider support around improved autonomy, administrative support, mentoring and induction programmes can result in lower levels of teacher turnover. Likewise, Australia provides a wide range of financial incentive packages, such as housing subsidies, retention benefits, holiday travel expenses, rural relocation allowances, loan reimbursement and bursary schemes.
- Collating the international evidence examined through this review tends to indicate that a combination of both financial incentives and those focused on developing skills and supporting teachers in their role are most effective in recruiting and retaining teachers in FE.

## 7. Conclusions

By collating the evidence identified through the literature review and the feedback provided during the telephone discussions, some broad conclusions can be drawn regarding the use of incentives to support FE teacher recruitment and retention. These are followed by recommendations for consideration by DfE and its partners in the future development of recruitment and retention incentives for FE.

### 7.1 Incentives to support recruitment

This review has identified a range of financial incentives in use across education and the broader public sector to encourage the recruitment of individuals into the workplace. There was a consensus across all the evidence, from education and wider industry, domestically and internationally, that financial incentives are just one of a wide range of strategies which should be employed to maximise recruitment and to ensure that trainees go on to take up teaching roles and remain in the profession long-term. Evidence from behavioural psychology supports this approach of utilising a range of strategies to tap into extrinsic and intrinsic motivations. These motivations vary from person to person and over time, suggesting that not only should a wide range of strategies be employed, but that they also should be flexible to adapt to differing and changing needs.

There does appear to be a place for financial incentives in certain contexts. Payments to individuals, such as bursaries, can enable those who would otherwise not have been able, to go into teacher training. They have also been shown to have an impact upon the speed of recruitment in the short term, encouraging more rapid enrolment amongst those already interested in the profession, thereby helping to quickly tackle teacher shortages. It therefore appears that financial incentives can increase applications for teacher training. In addition, funding which is targeted at organisations such as ITT providers (rather than individuals) shows some promise, and there are examples where providers have utilised it to develop and offer a wide range of recruitment and retention strategies with reported success.

There is also evidence that targeted programmes which recruit trainees from their local area and provide tailored training, support and structured placement experience can successfully address recruitment issues in disadvantaged or rural areas, which provides interesting potential for future programme development. Across the literature and the telephone discussions, the ability to tailor incentives to meet local need (e.g. gaps in particular subject areas) was noted as positive by providers/colleges and may help to mitigate the risk of overrepresenting particular subjects among new entrants to the profession.

## 7.2 Incentives to support retention

There is less evidence related to the use of financial incentives and their impact on retention in-service, indicating an opportunity for the development of future support in this area.

Evidence from research undertaken recently across the school sector suggests that pay considerations are not a key driver for teachers who are considering leaving the profession. More pressing concerns tend to be workload issues and perceptions of the sector. This tended to be reflected in the literature and telephone discussions, with a common theme emerging that non-financial incentives – and particularly the provision of mentoring and support – appear to play a key role in the successful transition from training to teaching, and for continued retention in the sector.

The evidence in the literature and emerging from the telephone discussions suggests that high-quality mentoring and support should feature:

- Sustained, active mentoring programmes to support new teachers whilst they embed their training and develop their teaching skills.
- Continued support and cross departmental mentoring to fill skills gaps, such as the use of technology in teaching.
- A strong CPD programme with multiple opportunities for progression and personal development.

Although the availability of SKE courses was felt to have increased confidence in teaching delivery, it was not suggested to have had an impact on retention; likewise, awareness of Golden Hellos appeared to be limited, suggesting that any packages of incentives to support retention need to be promoted widely to the sector to ensure positive take-up.

## 7.3 Delivery and management of incentives

Some common themes occurred across the literature and telephone discussions that related to the delivery and management of incentives, and their administration more generally:

- **Awareness:** providers, careers advisers and potential trainees need to receive clear communication about financial incentives to maximise their reach and to ensure there is no confusion as to eligibility and how they are applied.
- **Simplicity:** simple, clear eligibility criteria without too many restrictions.
- **Targeting:** specific targeting at areas of greatest need to maximise impact (both in terms of local need and shortage subject areas).



- **Flexibility:** to reflect local demand in teaching provision, which is varied from institution to institution.
- **Commitment:** a commitment to funding programmes in two-to-three year cycles would help providers to better plan and recruit.
- **Timing:** availability of incentives needs to be marketed early in the academic year, to ensure that potential candidates are not already enrolled onto other schemes prior to being made aware of the availability of FE incentives.

## 7.4 Gaps in evidence

This literature review has identified a series of gaps in the currently available evidence relating to the impact of financial incentives on FE recruitment and retention.

- Evaluations, where they have taken place, have tended to focus on the qualitative perceptions of providers and recipients rather than measuring processes in terms of effectiveness, or identifying good practice in the use of recruitment and retention incentives.
- Evidence of the longer-term impact of incentive packages (e.g. in terms of encouraging progression from training into teaching itself, or retention in-service) is not available, as recipients do not appear to have been tracked during any evaluations to-date. It has therefore not been possible to provide an accurate assessment of the comparative effectiveness of incentives designed for pre-employment, and those offered to those already in-service.
- Likewise, evidence of value for money (including levels of deadweight) is scant and not possible to review objectively as formal measures have not been included within evaluation reports to-date.

Where evidence does exist, the results appear to be varied, providing no clear consensus as to their effectiveness and no analysis of their value for money. This lack of robust evaluation makes it difficult to identify the lessons learned and also to understand whether they are being applied in the development of future incentive schemes. As such, these gaps should be addressed wherever possible during future evaluation activity.

## 7.4 Recommendations

There has been an increase in short term schemes in recent years which reflects the tension between deregulation and the need for government to address the consequences of other policy developments such as post-16 maths and English reform. There needs to be a clear and consistent approach to supporting the sector and a reduction in small schemes that have limited evidence of impact, ensuring that any future incentive schemes are clearly understood and have value for recipients.

Based on the strongest findings, i.e. where evidence can be drawn from across the literature and telephone interviews, the following recommendations are suggested for future consideration by DfE and partners during the development and delivery of any future incentive programmes.

- The provision of incentives that are responsive to local need would appear to have potential for increasing recruitment into FE. This would enable providers to have the flexibility to implement funding as required to best meet local need and recruit the necessary teachers in the right subjects. Potential approaches to local supply could be considered further as there was feedback to suggest that delivering funding at institutional level could be advantageous to recruitment in the sector.
- Evidence suggests that a mix of targeted individual incentives and funding for providers should be utilised. Consultations with providers could establish how they can best utilise funding flexibly and innovatively to meet individual needs, but within clear guidelines. The ability to offer bespoke incentive packages may be worth considering further in the context of FE, particularly in subject areas where individuals are being recruited from industry. A model whereby providers can combine types of incentive (financial and non-financial), may warrant further consideration for FE.
- National schemes to support FE teacher retention appear to be limited. Although financial incentives do seem to increase applications to teacher training, a holistic approach including both financial and non-financial support is most likely to help to ensure that recruits then progress into the profession from ITE, and stay in it over the longer-term. Evidence from international literature suggests that such an approach - including an initial financial incentive followed by a range of financial and non-financial approaches to supporting and retaining high quality candidates – could be effective in both recruiting and retaining FE teachers. Existing research indicates that CPD, mentoring and flexible working arrangements are common approaches to retention that should be part of any longer-term work. There is therefore the need to explore how a longer-term in-service strategy could be developed and funded specifically to promote FE teaching and encourage retention. This would also ensure that retention is given parity alongside initial recruitment/training in terms of the incentive programmes available. However as with other programmes, this approach should be piloted and evaluated, with recipients from recruitment through to completion and in-service progression, to provide robust data on the effectiveness of any new programme developed.
- To support the success of any future incentive programmes, it is essential that the FE sector, and the opportunities within it, are promoted more widely to the general public as well as at recruitment fairs and across industry sectors. Promotion of the sector as a credible career path would be an important step towards re-aligning perceptions and raising awareness, with the development of clear information

about providers, qualifications, training routes, career profiles, progression and salaries.

- Given the patchy nature of published evidence in terms of the success of previous incentive programmes, it is paramount that evaluation activity is included as an integral part of any future incentive programmes. This evaluation activity should be developed to include a framework of key measures/indicators of success, relating to (as examples):
  - Value for money
  - Deadweight
  - Impact on recruitment
  - Impact on rates of transition into teaching
  - Impact on retention in teaching (e.g. by tracking recipients three-to-five years post-completion)
  - Widening participation
  - Meeting local/sector need (shortage subject areas)
  - Good practice

These evaluation measures should be incorporated into any pilot incentive to ensure that lessons can be learned for national rollout – both in terms of what works well, and any challenges that may arise so that these can be addressed.

- An ideal opportunity for trialling effective approaches to evaluation could be implemented via existing incentive programmes that have not yet undergone evaluation and assessment.
- This research included only a small number of qualitative discussions with stakeholders. More in-depth qualitative research may therefore help to identify good and/or innovative practice at a local level, and particularly any differences in need for incentives across subjects and by geographical area.

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