

LONDON BOROUGH OF MERTON

REPORT AND RECOMMENDATIONS ARISING FROM

A SCRUTINY REVIEW OF

RECRUITMENT AND RETENTION IN MERTON'S SCHOOLS

NOVEMBER 2003

FOREWORD BY PANEL CHAIR

The review was initiated by the former Education and Lifelong Learning Scrutiny Panel and concluded by the Life Chances Scrutiny Panel, some of whose Members were on the Education and Lifelong Learning Scrutiny Panel. The review was undertaken for the following reasons:-

- Concerns about the shortage of qualified staff in schools;
- The redeployment of existing teaching staff through the recent Schools Reorganisation process;
- The need to seek recruits from overseas; and
- The issue of recruitment of ethnic minority staff in schools.

Recruitment and retention initiatives were examined and this included the recruitment of overseas teachers. The specific issue of the lack of ethnic minority teachers was highlighted, particularly in view of the disproportionately high number of exclusions of pupils from ethnic minority backgrounds.

The recruitment and retention of teaching and non teaching staff in Merton's LEA maintained schools is a key factor in working toward the raising of standards in schools. To this end, the report draws together a number of recommendations which should go some way toward building on the existing situation regarding staffing levels.

It is important that these recommendations are progressed through a robust action plan that is effectively monitored. Recommendation twelve proposes that the recruitment and retention of teachers in Merton be reviewed after a period of one year, including the issue of gender.

The contribution of both the statutory and non statutory education co-optees has been most welcomed and Members have appreciated the specific knowledge and practical experience which the co-optees have brought to the scrutiny process. This has provided the Panel with a valuable insight into specific problems experienced and concerns held by schools in recruiting and retaining staff.

A warm thanks to all the Members of the Panel for their efforts. And to the officers who serviced the Panel, our special thank you for their hard work.

Councillor David Chung
Chair of Life Chances Overview and Scrutiny Panel

LIFE CHANCES OVERVIEW AND SCRUTINY PANEL

Membership:

Councillor David Chung, Chair
Councillor Samantha George, Vice-Chair
Councillor Jillian Ashton
Councillor Margaret Brierly
Councillor Nick Draper
Councillor Sheila Knight
Councillor Edith Macauley
Councillor Oonagh Moulton
Councillor George Reynolds
Councillor Debbie Shears
Councillor Andrew Shellhorn

Co-opted Representatives:

Mr Andrew Boxall, Parent Governor
Mr Alex Murray, Parent Governor
Revd. David Monteith, Church of England Diocesan Representative
Mr Chris O'Connor, Roman Catholic Diocesan Representative
Ms Val Kenny, Headteacher Representative
Mr Bernard Lyons, Teacher Representative
Mr Henry Macauley, Merton Governors Council Representative

Also, from the former Education & Lifelong Learning Scrutiny Panel:
Councillors Matt Bird, Amanda Ramsay and Mike Tilcock;

Officers:

Sue Evans, Director of Education, Leisure and Libraries;
Tony Munday, Recruitment Strategy Manager, Education, Leisure and Libraries.
Barbara Jarvis, Scrutiny Officer.

Acknowledgements:

The Panel would like to express its thanks and appreciation to all those who contributed to this review, through preparing reports and attending meetings to answer questions. For further information relating to the review, please contact:-

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REPORT SUMMARY

The former Education and Lifelong Learning Scrutiny Panel was given approval to undertake a scrutiny review of recruitment and retention of both teaching and non-teaching staff in Merton's LEA maintained schools. The need for the review arose from:-

- concerns about the shortage of qualified staff in schools;
- the redeployment of existing teaching staff through the recent Schools Reorganisation process;
- the need to seek recruits from overseas; and
- the issue of recruitment of ethnic minority staff in schools.

Since May 2003, the configuration of scrutiny panels has changed and this scrutiny review has been progressed by the new Life Chances Scrutiny Panel, some of whose Members were also on the Education and Lifelong Learning Scrutiny Panel.

During the course of the review, Members have considered statistics presented on the recruitment of overseas teachers and have discussed recruitment and retention initiatives, particularly in relation to ethnic minority teachers.

This report contains the findings of the scrutiny review and the Panel's recommendations, which are contained throughout the report at the appropriate places, and which are also drawn together below:-

- 1. That the success of recruitment fairs be emphasised as a useful mechanism to aid appointments to vacant teaching posts, but that the LEA should focus its recruitment efforts on local university recruitment fairs, such as Roehampton, as this is most likely to produce beneficial results for Merton;*
- 2. That Merton's Web Team be requested to advance work on establishing a direct link between school vacancies on the website and Merton's Recruitment Strategy Manager;*
- 3. That the LEA should work more closely with other departments, specifically Social Services, to effect an interchange of ideas in relation to recruitment and retention in order to learn from each other and share ideas about effective strategies and incentives;*
- 4. That support and encouragement be expressed for effective tracking in relation to progress made by NQTs and also for a networking system to support them, including the NQT Induction Steering Group initiative;*
- 5. That the use of positive tools, such as exit interviews, be encouraged, with all schools requested to undertake exit interviews where staff agree, so that an accurate picture of the underlying reasons for staff leaving Merton's schools be obtained and appropriate action taken;*

6. *That the LEA should be strongly recommended to consider moving towards an annual exit survey questionnaire for teachers to be distributed by the Recruitment Strategy Manager, as these are extremely useful for acquiring feedback;*
7. *That the changes to teachers' workloads as outlined in the National Workforce Agreement be promoted and supported in Merton schools;*
8. *That there should be further investigation of statutory schemes and grants available to teachers, together with research into incentives offered by other authorities to help inform Merton's approach to employing teachers;*
9. *That the issue of affordable housing for teachers be acknowledged as the key priority when considering employment of teaching staff and incentives offered to attract applicants;*
10. *That strategies to increase the number of ethnic minority teachers in schools and initiatives to achieve this need to be identified and put into practice. This should include:-*
 - ◆ *more use of advertising in ethnic minority publications, such as 'The Voice';*
 - ◆ *targeting ethnic minority groups at recruitment fairs;*
 - ◆ *raising the issue of representation of ethnic minority groups with teacher unions' representatives;*
 - ◆ *investigating initiatives used by other authorities for recruiting ethnic minority teachers;*
 - ◆ *promoting the teaching/classroom assistant route to teaching qualifications, as a way of encouraging ethnic minorities into the teaching profession; and*
 - ◆ *reviewing the position with regard to the number of ethnic minority teachers after one year.*
11. *That the need to have information on the ethnic and national background of all teachers, including those recruited from overseas, held on the corporate HR database be emphasised, so that the Authority has a clear indication of the ethnic profile of teaching staff in its school, and so that the data can be analysed to inform the LEA's recruitment strategy;*
12. *That the situation with regard to recruitment and retention of teachers at Merton should be reviewed after a period of one year, including the issue of gender.*

1. INTRODUCTION

Recruitment and retention of both teaching and non-teaching staff in schools was identified by the former Education and Lifelong Learning Scrutiny Panel as an issue of concern, which Members had become aware of through their links with local schools and governing bodies. Whilst it was acknowledged that problems with recruiting and retaining staff in schools was a national one and not unique to Merton, it was agreed that a scrutiny review of recruitment and retention processes should be undertaken with regard to Merton's community schools. This would enable recommendations to be made with the aim of helping to alleviate any specific problems.

The Education and Lifelong Learning Scrutiny Panel commenced its work on the review in January 2003, when discussion of the key issues and scoping of the review took place. The terms of reference for the review were approved by the Overview and Scrutiny Commission for inclusion in the work programme of the Panel on 7 May 2003.

2. THE PROCEDURE FOR UNDERTAKING THE REVIEW

The review was progressed during normal scheduled Panel meetings, with an additional task group meeting arranged, where four nominated Panel Members worked on finalising the review recommendations. Therefore the amount of time for review discussion has needed to be used effectively. The Panel conducted its review work over 5 meetings, receiving updates on staff vacancies and recruitment in Merton's schools.

From May 2003, the review has been taken forward by the Life Chances Scrutiny Panel, following reconfiguration of scrutiny panels at the beginning of the 2003/4 Municipal Year.

The active involvement of both statutory and non-statutory education co-optees has been most welcome, and Members have appreciated the specific knowledge and practical experience which the co-optees have brought to the scrutiny review process, which has given the Panel a valuable insight into specific problems experienced and concerns held by schools in recruiting and retaining staff.

3. KEY ISSUES AND CONSIDERATION OF EVIDENCE

The key areas identified in the review terms of reference (See Appendix A) were considered by the Panel and the conclusions reached, together with specific recommendations, have emerged as follows:-

3.1 Staff Vacancy Levels in Primary and High Schools:

Recruitment:

Members received an overview of the recruitment procedure in schools and the Authority's position as a central point of contact for school vacancies and advice on suitable housing for staff. The Panel was informed that a monthly list of teacher vacancies was in operation and schools were encouraged to pass on information on vacancies.

The Panel considered an update on recruitment in January 2003, which focussed on various aspects of the process:-

▪ University Fairs:

Merton LEA is represented at Teacher Recruitment Fairs and attendance at these is now free of charge, although a charge is levied on all stand holders. Merton uses data supplied by the Teacher Training Agency and its own NQT survey to determine which fairs will most benefit the LEA. As detailed in the recruitment update, the following University Fairs were attended by Merton LEA:-

- Roehampton
- Kingston
- St Mary's Twickenham
- Brunel
- Reading
- Winchester
- Teaching in London Event
- Institute of Education
- Canterbury

Having considered this list, the Panel agreed that it would be most beneficial to concentrate efforts on those universities which were most likely to benefit Merton.

Recommendation 1

That the success of recruitment fairs be emphasised as a useful mechanism to aid appointments to vacant teaching posts, but that the LEA should focus its recruitment efforts on local university recruitment fairs, such as Roehampton, as this is most likely to produce beneficial results for Merton.

▪ Recruitment Agencies:

Merton is working with the Government Office for London to introduce a Preferred Suppliers List, with the aim of giving London LEAs considerable scope to reduce the rates that agencies charge and ensure that LEAs work only with reputable agencies.

Part of the Panel's work has also been the monitoring of Merton's Schools Reorganisation Project, which has brought in a two tier system of primary and high schools. Issues relating to staff placements into the new system have been considered as part of this monitoring, including some difficulties with placing a number of teaching and teaching assistant staff. However, the number of unplaced staff has reduced as the Project has progressed and assurances given that there are sufficient placements for all the staff involved. Nevertheless, negotiations on particular staff requirements made some placements more complex than others.

The Panel has borne these issues in mind when undertaking the scrutiny review of recruitment and retention generally and welcomed the fact that, where there is a reduction in teaching posts, mechanisms are used to redeploy teachers to avoid the need for redundancy.

▪ Web/Internet:

A weekly list of teaching vacancies is available via e-mail and sent to all schools. Candidates requesting information on teaching in Merton also receive a copy. A master copy is also logged indicating forthcoming vacancies with periodic checks to conform successful placement. Members considered how best to ensure that the list of vacancies is easily accessible. Although the vacancies are available on Merton's website and details of each post can be accessed, there is currently no direct link to the Education Recruitment Strategy Manager, who therefore has to be contacted separately.

Recommendation 2

That Merton's Web Team be requested to advance work on establishing a direct link between school vacancies on the website and Merton's Recruitment Strategy Manager.

▪ Keeping in Touch:

The Teacher Training Agency (TTA) runs a Keeping in Touch Programme, through which retired teachers can continue to have contact with their local LEA and receive a newsletter from the TTA. This allows interested teachers the possibility to return to teach either full time or part time, bearing in mind that not all retired teachers are of the statutory retirement age.

- South London Group:

Merton has formed a working partnership with the London Boroughs of Bexley, Bromley, Croydon, Kingston, Richmond, Sutton and Wandsworth. This affords the benefits of representation at a wide base of university recruitment fairs, the sharing of information, joint advertising for NQT, PGCE (post graduates), OTT (overseas teachers) and experienced teachers, with the cost shared between the eight partners. The Group holds regular monthly meetings and is able to exert some influence with the TTA, drawing attention to issues affecting South London LEAs.

- Working with other departments within the Authority:

Although working with local partners is crucial, Members acknowledged that recruitment and retention problems are not unique to the field of education and other departments within the Council also experienced difficulty in employing good quality staff. In particular, the area of Social Services was raised as one which nationally experiences problems in recruitment and retention. It was suggested that closer working with other departments, in particular Social Services, would be beneficial, in order to learn from each other and share positive ideas regarding recruitment strategies and employment incentives. For example, it emerged that the incentive of a small reward for introducing a new staff member to the Authority was operated in another department and this could be something that Merton's schools could be encouraged to do.

Recommendation 3

That the LEA should work more closely with other departments, specifically Social Services, to effect an interchange of ideas in relation to recruitment and retention in order to learn from each other and share ideas about effective strategies and incentives.

- Databases:

Merton runs a teacher database, which can correlate CV applications and attempt to match them to vacancies. CVs are distributed weekly to schools expressing an interest on a weekly basis. Merton is also operating a database pool for NQTs seeking a post from September 2004 for both primary and secondary schools in the Borough.

- Publicity/Target audience:

Efforts have been made to raise the profile of teacher recruitment in Merton through the local press, cross-borough projects, a recruitment open day and use of the display boards in the Merton Link in the Civic Centre Foyer. A series of advertisements in the Independent national news paper have also been released, in addition to one year advertisements at Wimbledon and Mitcham railway stations. The importance of 'selling' Merton as an employing

authority was emphasised, with the need to highlight the positive aspects of the Borough.

▪ Funding:

Funding for the post and activities of the Recruitment Strategy Manager is received from the TTA and has been confirmed until July 2005.

3.2 Evaluation of Newly Qualified Teachers (NQTs):

It emerged that a database pool for NQTs seeking employment from September 2003 for both primary and secondary schools has been set up and was in operation at the time of the review. Headteachers submit their requirements each December prior to the start of a new academic year the following September. A vacancy matching service is provided to help give headteachers the staff they are seeking. The success of Recruitment Fairs, which are used to attract NQTs, was emphasised. Merton attracted over 400 expressions of interest for working in Merton Schools from the latest 'season' of fairs and application forms were sent out to students to enable them to enter the NQT pool. For 2004, the NQT database has been modified to give a report on the ethnic background of all NQT applicants. (See Appendix B for NQT data results).

Members were informed that there an evaluation of NQTs in their first year in a Merton school, which was welcomed. The LEA, together with the school, ensures that each NQT is assigned an induction tutor. Each NQT and Induction tutor must adhere to the standards set out in the Teacher Training Agency Induction Standards Programme. Three termly assessments are completed on the NQT by the Induction tutor and Head Teacher, with the third assessment recommending a pass, fail or extension of the induction year. The LEA then considers the assessment forms and a recommendation is forwarded to the General Teaching Council.

A specific note of concern expressed was the cessation of Standards Fund grant to schools for recruitment and retention of more than £400,000 from 2004 and also the loss of £1,000 Standards Fund support for NQTs, which is unfortunately outside the control of the LEA.

NQTs are encouraged to liaise with each other and networking events were arranged, with a welcome evening in September and a finishing evening in July each year. In addition, a networking event was being arranged for December 2003, to include tutors, the TTA and the Director of Education. Members were encouraged to learn that, with effect from January 2004, Merton will have an NQT Induction Steering Group.

Recommendation 4

That support and encouragement be expressed for effective tracking in relation to progress made by NQTs and also for a networking system to support them, including the NQT Induction Steering Group initiative.

3.3 Exit Interviews:

The Panel expressed the view that exit interviews would be a helpful tool to determine why staff left Merton's schools. It was important to evaluate whether staff were leaving the teaching profession as a whole or just a Merton school, so that any particular problems could be identified.

Recommendation 5

That the use of positive tools, such as exit interviews, be encouraged, with all schools requested to undertake exit interviews where staff agree, so that an accurate picture of the underlying reasons for staff leaving Merton's schools be obtained and appropriate action taken.

In a strategy to gain more information on teachers leaving Merton schools, an exit survey questionnaire will be sent to all teachers leaving Merton from July 2003, to gain a clear perspective of the reasons for departure. The first survey is due to be distributed from 31 October 2003 and is anonymous, with no personal details requested. The questions will include:-

- Type of contract – temporary/fixed?
- Time spent in current school?;
- First teaching post?
- Subject specialism?
- Factors for leaving post?
- Will person be staying in teaching?
- Gender?
- Ethnicity?
- Would person consider returning to Merton to teach?

Initial indications are that Merton has a turnover for teachers of 17.9%. This can be compared to 16.9% cited in the Local Government Association report on Teacher Retention for Greater London LEAs for 2002. The Panel considered that such a survey will prove extremely informative and should therefore be undertaken regularly.

Recommendation 6

That the LEA should be strongly recommended to consider moving towards an annual exit survey questionnaire for teachers to be distributed by the Recruitment Strategy Manager, as these are extremely useful for acquiring feedback.

3.4 Recruitment and Retention of Non-Teaching Staff:

Many of the non-teaching positions in schools are on a term time basis only and at this time do not present great difficulty in recruiting to a vacant post. Many applicants consider the flexibility of working term time the "best" retention tool. With the Government's introduction of High Level Teaching

assistants HLTAs there is now an opportunity for teaching/classroom assistants to gain a recognised qualification in their field, with financial support from Central Government.

Many of the incentives available for teachers are also available for non-teaching staff. Many candidates seeking to join the Graduate Teacher Programme (GTP) also use the teaching/classroom assistant route to start their qualification process.

▪ National Workforce Agreement:

The Panel discussed the implications of the National Workforce Agreement which was introduced on 1 September 2003, which sets out in detail the responsibilities which should be covered by teachers and those that should be undertaken by teaching assistants, such as classroom displays. Members acknowledged that this agreement will have some impact on schools if taken up, as it involves contractual changes, but welcomed any initiatives to reduce teachers' workloads, including paperwork.

Members agreed that the increase in paperwork required from schools by the DfES had added to the burden on school staff, which inevitably made this a contributory factor in staff retention. However, the Director of Education, Leisure and Libraries advised that she would be discussing the introduction of strategies to reduce teacher workload with headteachers, which might include use of advanced teaching assistants. This was welcomed by the Panel.

Recommendation 7

That the changes to teachers' workloads as outlined in the National Workforce Agreement be promoted and supported in Merton schools.

3.5 Options for Employment Incentives:

Merton offers a variety of incentives to meet the needs of teaching staff:-

- Continuous Professional Development;
- Access to the Government's Starter Home Initiative;
- Interest free season ticket loan (train or bus);
- A July start for NQTs (some schools only);
- Inner London pay scales;
- Laptop computers (some schools only);
- Gold Card Scheme for discounted entry to Merton sports facilities;
- Childcare facilities.

The Panel also considered that it is important to look at what other LEAs offered as incentives, as well as other departments within Merton Council (i.e. Social Services). The following are some of the incentives offered by other LEAs:-

-
- Subsidised housing cost for an initial period;
 - Relocation expenses;
 - Temporary accommodation;
 - Travel expenses if coming from overseas;
 - Travel allowance;
 - Interest free loan.

The Government is working on a number of projects and pilot schemes nationally to improve retention of teachers. These include the Advanced Teaching Assistant scheme, pilots looking at how to reduce teachers' paperwork overload, investigation of the possibility of subsidised travel within London and a scheme for paying off student loans.

Recommendation 8

That there should be further investigation of statutory schemes and grants available to teachers, together with research into incentives offered by other authorities to help inform Merton's approach to employing teachers.

The Panel acknowledged the various initiatives already outlined and welcomed the attempts being made to address the problem of recruiting and retaining good quality teaching staff. However, Members considered that the key issue of concern facing teachers was the issue of housing.

- Housing:

The problems faced by teachers in securing suitable, affordable accommodation in the London area were considered, as this was seen as a major factor affecting teacher recruitment. The Panel was informed that Merton works with Tower Homes on the Starter Home Initiative for Teachers, with 33 allocated places on the scheme, whereby Tower Homes contribute up to £50,000 towards the cost of a teacher's first property, through an interest free equity load, not repayable until the property is sold. Not surprisingly, a considerable number of enquiries are received whenever the Initiative is advertised. For 2002/3 there were 135 enquiries in Merton, representing 10% of Merton's teachers.

Merton LEA also intends to continue work with the Government Office for London in developing a solution to the problem of travel costs, with possible free or subsidised travel for London teachers, paid for by Central Government.

There is also work being undertaken with Merton's Housing Department on a project in the Colliers Wood area towards a private development of key worker accommodation at an affordable rent.

Recommendation 9

That the issue of affordable housing for teachers be acknowledged as the key priority when considering employment of teaching staff and incentives offered to attract applicants.

3.6 Ethnic Minority Teachers:

The specific issue of a lack of ethnic minority teachers was highlighted, particularly in view of the disproportionately high number of exclusions of pupils from ethnic minority backgrounds (as considered in a separate scrutiny review which has recently concluded). This led to agreement that there needed to be particular efforts devoted to addressing this concern.

Recommendation 10

That strategies to increase the number of ethnic minority teachers in schools and initiatives to achieve this need to be identified and put into practice. This should include:-

- ◆ ***more use of advertising in ethnic minority publications, such as 'The Voice';***
- ◆ ***targeting ethnic minority groups at recruitment fairs;***
- ◆ ***raising the issue of representation of ethnic minority groups with teacher unions' representatives;***
- ◆ ***investigating initiatives used by other authorities for recruiting ethnic minority teachers;***
- ◆ ***promoting the teaching/classroom assistant route to teaching qualifications, as a way of encouraging ethnic minorities into the teaching profession; and***
- ◆ ***reviewing the position with regard to the number of ethnic minority teachers after one year.***

3.7 Overseas Teachers:

The Panel acknowledged that there was a need sometimes for the LEA to recruit teachers from overseas and information was provided on the numbers involved. This information, which was considered by the Panel on 1 July 2003, can be found in Appendix C. It was confirmed that overseas trained teachers were unlikely to have the necessary DfES qualifications to be designated as having Qualified Teacher Status.

With regard to the issue of Merton's HR Payroll database holding information on ethnic and national backgrounds of overseas teachers, it emerged that the ethnic profile of overseas teachers, where it is provided by teachers working for the LEA, is now recorded in our system. However, Merton is not able to identify overseas trained teachers or their ethnic and national background once they have qualified teacher status in the UK. Nevertheless, the Panel considered it important to hold information on the ethnicity and national background of all teaching staff in the Borough.

Recommendation 11

That the need to have information on the ethnic and national background of all teachers, including those recruited from overseas, held on the corporate HR database be emphasised, so that the Authority has a clear indication of the ethnic profile of teaching staff in its school, and so that the data can be analysed to inform the LEA's recruitment strategy.

3.8 Gender Issues:

Concern about the small number of male teachers in schools, particularly primary schools, was raised and it was agreed that the lack of male role models impacts on schools and is of concern, although it is accepted that this is a national problem. Appendix B clearly shows this imbalance in Merton. It is suggested that this is one issue which should be reviewed at a later date, to determine whether any positive initiatives can be devised to encourage more male teachers to take up posts in Merton.

Recommendation 12

That the situation with regard to recruitment and retention of teachers at Merton should be reviewed after a period of one year, including the issue of gender.

4. CONCLUSIONS AND IMPLEMENTING RECOMMENDATIONS

The LEA will continue to work towards improving recruitment and retention of teachers, including working with the Government Office for London in developing a solution for either free or subsidised travel (paid for by Central Government) for London teachers. There will also be consideration of an overseas teacher recruitment drive, including assessment of the benefits this may or may not have for Merton schools.

The 12 specific recommendations agreed by the Life Chances Scrutiny Panel, as outlined in this report, will be presented to the Overview and Scrutiny Commission for formal endorsement and then to Cabinet for final approval and implementation, through the Cabinet Member for Education and Lifelong Learning and the relevant LEA officers.