



Leadership for excellence
In Education and training

Scoping Study for a Review of Initial Teacher Training Provision in Wales

A report for

**The Teaching and Leadership Division of
the Welsh Assembly Government**

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PART 1: Introduction

1. This report draws together and summarises the responses of 22 organisations consulted on the need for a review of ITT provision in Wales. The organisations, which included representatives of schools, all eight HE providers of ITT and other key partners with an interest in ITT, are listed in Annex 4 of the report. Interviews with consultees were held during November and December 2003. A number of organisations also submitted or referred to documentary evidence relevant to the study and these sources have been listed in Annex 3.

2. Consultees were invited to comment on both the general need for a review of ITT provision in Wales and the weight that a review, if needed, should give to specific aspects of the planning and delivery of ITT outlined in the terms of reference for the scoping study. They were also invited to comment on what should be the terms of reference for a review, and how a review might be carried out in terms of its timing and methodology. A copy of the full terms of reference for the scoping study is included in Annex 2.

GENERAL ARGUMENTS FOR A REVIEW

3. Consultees put forward a number of general arguments for a full review of ITT provision in Wales. In addition, it was felt that there were important issues that ought to be considered in determining the scope of a review. While there was a general wish for a review to be comprehensive, many respondents stressed the need to take careful account of evidence from reviews of aspects of ITT provision already completed and of the outcomes of current initiatives and developments. Similarly, a number expressed a need for caution in assuming that establishing new or different structures within Wales would necessarily be successful in solving problems that had proved intractable within the current framework for the recruitment and training of teachers. The following paragraphs summarise the responses of consultees to the general question of a need for a review.

A comprehensive review of ITT provision in Wales would add completeness to the wider review of HE undertaken in 2003 the outcomes of which were published in '*Reaching Higher*' (Welsh Assembly Government, 2003)

4. Initial Teacher Training is largely delivered by the HE sector in partnership with schools. However, the provision has key characteristics that set it apart from the bulk of undergraduate and graduate courses across the sector. '*Reaching Higher*', the most recent major review of HE provision in Wales, does not make any specific references to the future strategic direction of ITT, nor, simply by reason of that review's terms of reference, does it address the particular issues and concerns that relate specifically to ITT provision.

A thorough review is needed to take account of the distinctive policy agenda for education and training in Wales

5. Added weight is given to the case for a full-scale review by those who stress the growing divergence between England and Wales in the direction of key

educational policies. Particular policy areas mentioned by consultees as having distinctive implications for ITT include:

- proposals to implement a new Foundation Phase (for pupils aged 3-7) based on a revised Early Years curriculum;
- a distinctive approach to the 14-19 curriculum and qualifications in Wales, with underpinning principles embodied in the Welsh Bac.
- progress towards increasing Welsh and bilingual provision to support the creation of a fully bilingual society;
- statutory requirements and pledges on class size, teachers' workload and the reduction of bureaucratic burdens;

6. While most of these are the subject of parallel developments in England, some are not; there are also policy drivers that inform decisions about the allocation of intake targets and training routes in England that do not apply in Wales.

The division in Wales among different bodies of functions carried out more centrally by the DfES and TTA in England make it difficult to sustain coherence and a clear strategic direction in the planning, funding and delivery of ITT provision.

7. It is argued that a review should come to a view about whether the current structure and the roles played by individual bodies provide the best basis for planning and funding ITT. In meeting the future needs of schools in Wales, key aims should be to increase the supply of specialist teachers in priority areas, including Welsh and Welsh medium, to increase gender balance and diversity in the workforce, while at the same time helping to realise wider aspirations for the HE sector in Wales.

8. The key functions performed by different bodies include:

- Department for Education and Skills (DfES): operation of the Teacher Demand and Supply Model involving the annual analysis of relevant data to inform the setting of intake targets on an England/Wales basis;
- Welsh Assembly Government: decisions in the light of policy about the precise target numbers for HE providers to be funded in Wales, the level of financial incentives to be provided and of funding to be made available for non-traditional routes for achieving QTS;
- The Higher Education Funding Council for Wales (HEFCW): the accreditation of ITT courses and the funding of undergraduate and post-graduate ITT places for primary, secondary phase and for individual secondary subjects across the eight main HE providers who make up the ITT sector in Wales;
- The Teacher Training Agency (TTA): the marketing of teaching as a profession and the provision of information about routes and pathways for achieving QTS (carried out on behalf of Wales by the TTA on the basis of a MoU);
- TTA Regional Recruitment Adviser for Wales: has a role in advising and supporting the marketing, promotion and recruitment activities of individual providers, particularly in shortage areas;

- Higher Education Institutions (HEIs): market and recruit individually for particular training routes and courses, where necessary, in liaison with schools or other partner providers.

9. There is a perception among consultees that there are disadvantages in having as many partner organisations involved in the processes indicated above. However, the main functions undertaken by separate bodies in Wales do have parallels in England, even though the teams responsible may be located within the same overall department or agency. To some extent, the fragmentation is offset by the existence of the Teacher Training Recruitment Forum for Wales (TTRF). This group, composed of HEI providers and representatives of key agencies, meets termly to consider generic issues affecting recruitment, to share information and good practice and to support collaboration. Nevertheless, consultees feel that the arrangements in Wales could be streamlined or integrated more helpfully. Particular issues mentioned include:

- difficulty in discerning and sustaining a unified strategy for ITT;
- processes lack transparency and can be protracted;
- the circumscribed role of each group limits the scope for articulation and development.

A review is needed to take account of the impact of reconfiguration of the HE sector on the delivery of ITT, and of current developments in partnership and the collaborative delivery of training.

10. Taken together, these developments already have implications for the overall map of training provision with a number of partnerships under discussion, planned or already in operation. It is argued that there is a need for a central and agreed strategy to inform, guide and coordinate the collaborative work underway. It is felt that the overarching aim should be to ensure that partnerships contribute to a coherent pattern of ITT provision across Wales rather than consisting of isolated or 'ad hoc' responses to local or regional circumstances.

ISSUES THAT NEED TO BE CONSIDERED IN DETERMINING THE SCOPE OF A REVIEW:

What are the advantages of maintaining joint arrangements for ITT provision across England and Wales?

11. Some consultees argue that there is little to be gained and much to lose from a total separation of the Welsh system of ITT entirely from that in England. While it is clear that current strategies are not fully meeting the specific needs of Wales, it is vital to recognise that there is a joint Wales/England market for training and employing teachers and therefore a need to maintain common and consistent standards of training across the two countries.

What is the extent of current evidence available as the basis for the work of a review group?

12. Many consultees point to the considerable body of relevant research, reviews and other work either recently completed, ongoing or scheduled to take place. Some argue that a significant amount of 'review activity' has already taken place. In order to map a coherent strategy for the future of ITT provision in Wales, there will need to be close accord between proposals emanating from any review and the messages from:

- the ongoing revision of Assembly Government Circular 13/98;

- recommendations of the Steering Group for the promotion of bilingualism in HE established under the chairmanship of Andrew Green, National Library of Wales;
- commissioned study on the training implications of the Foundation Phase for pupils 0-8;
- Newly introduced arrangements for Induction and CPD;
- *Reaching Higher* and current proposals and discussions about reconfiguration in the HE sector generally;
- HEFCW's commissioned review of Partnership;
- The current review of Research in Education in Wales carried out by Professor John Furlong;
- Estyn's findings on the evaluation of GTP and other current studies;
- Work of GTCW's Professional Development Task Groups and the evidence base for the *Action Plan for Teacher Recruitment and Retention in Wales*.

What is the current progress towards meeting sector targets and goals?

13. Those who favour a more limited review stress the significant progress made across the sector in recent years towards the achievement of shared strategic objectives. They also point to the considerable survey and research literature that exists in relation to many of the key challenges facing the sector, and to the body of on-going action-based research undertaken by HEIs in collaboration with their partner schools. It is argued that these offer useful models and exemplars, illustrated in Estyn's recent evaluation: *Excellence and Innovation in ITT*, that are helping to disseminate successful practice across the sector.

What are the underlying issues affecting the recruitment and retention of teachers?

14. There is a degree of scepticism among consultees generally about whether changing the mechanisms of planning and funding, or re-apportioning roles and responsibilities to different bodies, would have a significant impact on the ability of Wales to recruit, train and retain greater numbers of specialists in shortage areas or to achieve a more diverse teaching workforce. These call for longer term strategies and sufficient evidence exists to form the basis for policy direction and planning.

What would be the resource implications of establishing wholly separate arrangements for ITT in Wales?

15. In view of the above, a review would need to take seriously the resource implications of making changes which necessitated the setting up of any new body or bodies in Wales, or of adding significantly to the remit or duties of existing bodies. While creating or adding new functions in Wales might increase the capacity, flexibility and responsiveness of the sector in meeting Welsh needs, it needs to be clear that such needs could not be addressed equally well by other means and that the establishment of new or additional bureaucracies would result in value for money.

RECOMMENDATION

16. There is strong case for a review of ITT provision in Wales. While there is no convincing case for a complete divorce between arrangements in Wales and England, in order to be worthwhile, any review needs to be comprehensive in scope and have the resources to look in depth at all aspects of current provision. A review should also consider carefully whether features of the current system provide an adequate basis for re-modelling to bring about desired changes and improvements. The terms of reference need to be broad enough to take account of the demographic context, the profile of the teaching workforce and the distinctive policy context in Wales.

PART 2: Consideration of key issues within the terms of reference

Issue A: The adequacy of the current Wales/England model for setting *overall* intake targets for ITT

Current situation:

17. The annual intake targets for recruitment to ITT courses set by the Welsh Assembly Government are underpinned by the Department for Education and Skills (DfES) Teacher Supply Model. This takes account of a wide range of data on both the numbers of pupils in schools and the numbers of teachers entering and leaving teaching each year. The data are used to quantify the numbers of new teachers needed in the early years and primary schools. For secondary schools, the numbers needed are broken down further into individual subjects. The model is based on projections about:

- the size of the future school population across England and Wales; and
- a series of assumptions about the annual inflow and outflow of teachers to the profession.

Some aspects of the model, such as the proportion of teachers needed in individual secondary subjects, are fed by England-only data from the annual Secondary School Curriculum and Staffing Survey, and the numbers are then scaled up (by about 7%) to take account of the additional numbers in Wales. Final intake targets are also subject to a range of policy considerations and take account of shortage areas and the capacity of the sector to meet the targets set. The targets produced by the model also include an additional 8% to allow for an element of competition in applications for jobs.

Commentary on the views of consultees:

18. This, as all who are involved agree, is not 'rocket science', but it has served effectively to give broad brush indications of need, taking account of the likely demand for teachers in the light of projected pupil numbers by phase across England and Wales. It is argued that most of the broad assumptions on which the model is based are backed up with data that has equal applicability to Wales and England, that the model has stood the test of time.

19. On the other hand, the majority of consultees raised questions about the adequacy of the DfES Teacher Supply Model methodology in providing an accurate picture of workforce needs in Wales and therefore as a sufficient basis for developing a strategic approach to meeting Welsh needs. A number of consultees argued that the profile of the teaching workforce in Wales, for example in terms of age, gender, secondary subject qualifications, bilingual capability etc is sufficiently distinctive and different from the overall profile for England and Wales to invalidate the outcomes of the joint England and Wales model used to predict training needs. An obvious deficiency that needs to be addressed is the fact that the demand and supply model takes no account of needs for Welsh medium provision. Another weakness is that the current methodology is ineffective in addressing many concerns which exist at a regional rather than a national level and are often linked to mobility (or lack of mobility) of the potential workforce.

20. The GTCW believe that the data on qualifications now collected for the Register of Qualified Teachers provides a more detailed and accurate profile of specialist qualifications than in the past. The Assembly Government's revised school census form for 2004 will further improve the range and quality of available data on needs, for example, on applications for posts, retention of teachers and exit information.

Conclusion and recommendations:

21. The issues raised are of sufficient concern to justify an in-depth study of the potential benefits and costs involved in developing and implementing a home-grown demand and supply model based on Welsh data. Any new methodology would need to address the fact that up to a quarter of trainees on ITT courses come from outside Wales and even larger proportion of those who qualify take jobs outside Wales. A prime task for any review would be to establish how far, and at what stage, it would be possible to disentangle the relevant information from Wales and England. It may be possible to retain some of the advantages of linking overall targets in Wales to the joint supply and demand model, while modifying phase and subject allocations to take greater account of Welsh needs.

22. Some concerns raised by consultees, such as those relating to the projected retirement of teachers, are common to England and Wales and are addressed satisfactorily by the current joint model. Nevertheless, there may be ways that the usefulness of the model could be increased by feeding in supplementary data relating to Wales, including information relating specifically to the supply and demand for teachers able to work through the medium of Welsh. A review should consider:

- the potential for refining the ITT intake targets for Wales using either a separate or supplementary demand and supply model based on Welsh data;
- the most effective strategy for addressing the imbalance between the numbers of primary and secondary trainees; and
- ways in which the additional data being captured by the GTCW Register and school census form can be used to inform planning for ITT and targets for recruitment.

Issue B:	The arrangements for setting intake targets and funding ITT provision in Wales
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Current situation:

23. Overall sector targets are initially worked out at an all-Wales level by the Assembly Government. Targets for secondary training are broken down into subject areas and take account of designated priority subjects (mathematics, English, Science, modern foreign languages, Welsh, design and technology and IT).

24. HEFCW has the responsibility for allocating training places to individual providers. Within the overall allocations made by WAG, there is scope for flexibility in the allocation of 5% of places which can be vired between subjects on the basis of bids from providers. The criteria applied by HEFCW in these cases include: the quality of courses as evaluated by Estyn; the regional spread of provision; and historical success of providers in filling agreed quotas. Targets in priority areas have to be realistic and achievable; they may therefore be set below the ideal number of trainees required in some specialist subjects, although success in meeting targets may well result in future targets being raised.

Commentary on the views of consultees:

25. As suggested above (in para.5) the diverging policy agenda means that Welsh needs are increasingly distinct from those in England. There is a strong feeling that planning should take increasing account of these differences and, in particular, the likely future demand for Early Years specialists, Welsh and Welsh medium teachers and teachers of other specific shortage areas in Wales. In order to do so, there is a need to review the evidence base and definitions on which judgements about needs are made. For example, while the number of overall vacancies and unfilled teaching posts in Wales is relatively low, it is felt that this gives only a partial picture of the actual scale and impact of shortages and takes little account of what are widely perceived to be reductions in the numbers of applicants for posts in certain specialist subjects and the wide disparity in the supply of specialist staff across different areas of Wales. Consultees also pointed to research on the ways that schools cope with shortages in specialist areas by:

- deploying non-specialist teachers and/or less well qualified or experienced staff on short-term contracts; or
- cutting or reducing aspects of the curriculum and other provision.

26. While it is agreed that Wales trains more teachers (7% of the Wales/England total) than currently teach in schools (fewer than 6%), there are also concerns about the likely knock-on effects of an across the board reduction, including issues about adversely affecting the viability of the remaining provision. This is discussed further in the following section under viability and cross-border movement.

27. Many consultees stressed the importance of the regional dimension in reviewing ITT provision. While it is generally agreed that, at national level, there needs to be a readjustment in the balance between primary and secondary training, some providers are at pains to point out that their records show that a very high proportion of their trainees are successful in gaining employment as teachers within the immediate locality and region.

28. Given the policy context of 14-19 development in Wales, consultees expressed a strong desire to explore ways to bring together the training and qualification requirements of teachers working across this age range in schools and colleges, particularly with regard to the post-compulsory phase. Some organisations stressed their commitment to teaching as an all-graduate profession, but this was not thought to preclude mutual recognition of a new PGFE qualification as the basis for QTS across the post-16 phase.

Conclusion and recommendations:

29. A number of the concerns expressed in relation to this issue follow on from the previous section and relate to matters of future education policy and development. Underlying these concerns is a desire to strengthen the strategic connections between the target setting process in Wales and the way that teacher supply impacts directly on schools, both in terms of the numbers and quality of available teachers and schools' capacity to deliver the evolving curriculum. Uppermost in the minds of many consultees were the implications of training teachers for the new Foundation phase and for 14-19. A review therefore needs to consider ways to strengthen the use of evidence at a regional as well as national level in order to ensure a clear and strategic link between ITT provision and the needs of schools. As part of this, a review should consider:

- the nature and source of the data used to identify needs in priority subjects and other specialist areas;
- the best mechanism for modelling demand and supply to reflect Welsh needs;

- how far such a model might forecast needs by location and modes of delivery as well as by volume and phase;
- achieving greater transparency in the way that policy drivers impact on these decisions.

Issue C:	The methodology for setting appropriate intake targets that match Welsh needs (taking account of cross-border movement and the need to maintain viable courses)
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Current situation:

30. Target numbers to individual providers are determined by HEFCW. The stated criteria take some account of needs, but they are also reflective of historical numbers and the success of providers in recruiting, the popularity of courses that attract large recruitments, arrangements which allow for some subsequent 'virement' between subjects, between providers (in the interests of rationalising provision), and even between ITT places and even recruitment to non-ITT provision. Subject courses that fail to reach targets (currently including eg English, Modern Foreign Languages and Welsh) may be 'capped' if they miss targets by 5% or more for two consecutive years (previously 10%). The Council does not fund cohorts of trainees 'where an institution fails to recruit a minimum of ten students in two consecutive years' (WO2/81HE). Providers are invited to consider 'how targets might be further adjusted or rationalised to improve recruitment performance', for example by increasing secondary provision and building on current recruitment strengths.

Commentary on the views of consultees:

31. The relationship between, on the one hand, setting intake targets, and meeting shortages and increasing diversity is seen as complex and problematic. While the allocation of targets is obviously effective in 'keeping a lid' on courses that might recruit far larger numbers than might be needed, there is no obvious relationship between the allocation of intake targets and success in increasing recruitment in shortage subjects other than by the application of financial incentives.

32. There has been general recognition that the setting of targets has not impacted on the imbalance between primary and secondary phase recruitment or addressed the shortages of specialist in individual secondary subjects. While the Assembly Government has decided to maintain primary targets at the current level in 2003/04, it has stated its intention of 'working towards establishing a better balance between secondary and primary targets and having targets more closely linked to demand for teachers'. The TTA has set itself the target of increasing the recruitment of men to primary teacher training by 20% on last year's intake. It is not clear to what extent the same target applies (or should apply) to Wales.

33. Any review will need to align its proposals with the reconfiguration of the HE sector generally and the collaborative arrangements for ITT evolving from individual mergers and partnerships. This is discussed further in section 2.7

CROSS-BORDER MOVEMENT

Commentary on the views of consultees:

34. Cross-border movement is a feature of the joint labour market. It is stimulated by the fact that a significant proportion of trainees domiciled outside Wales undertake

their training in Welsh HEIs. It is estimated that between a quarter to one third of teachers trained in Wales take up teaching posts in England or elsewhere. An important consideration adduced by those who favour maintaining the link with the English system is the need to maintain common standards and the acceptability of qualifications across England and Wales. It is generally agreed that Welsh providers have a good track record of preparing trainees to teach in both the English as well as the Welsh school systems.

35. There is also a cross-border element in a significant amount of training with strong partnerships established between Welsh schools in some parts of the country and England-based providers. Schools are still coming to terms with the implications of the recent DfES decision that, in order to gain QTS in England, trainees must complete more than half their teaching practice in schools in England. This does not prevent teachers trained in England from working in Welsh schools. However, an obvious effect pointed out by some consultees was that, by reducing the demand for training places in some Welsh schools, the requirement will reduce the scope for those schools to recruit specialists whose work they have seen at first hand.

36. It was pointed out by more than one teacher organisation that there has been a history of significant numbers of new and experienced teachers from Wales teaching for part of their careers in England before returning to teach in Wales. Teachers and headteachers consulted stressed the benefits for Welsh schools of staff having gained experience of working in the context of different regions and local authorities. GTCW figures suggest there is relatively little cross-border movement after teachers have qualified and taken up their first teaching post (of the order of 150 teachers a year). Nevertheless, headteachers in some parts of Wales look favourably at applications from teachers who have trained and worked in England because, at best, they bring fresh experience and new approaches to their work.

VIABILITY ISSUES

Commentary on the views of consultees:

37. For any review, a key consideration for HE providers is the positioning of ITT within the wider context of teacher education, training, CPD, leadership training and research. Ideally, these elements are regarded as part of a holistic input to teacher education and training (ITET) which should inform and be informed by research activity undertaken in partnership with schools and LEAs. It is argued that changes made in isolation to the ITT strand of provision will inevitably have knock-on effects on the totality of the HEI's work. While such changes might equally be positive or negative, they need to be taken into account. Smaller providers stress the critical place of ITT provision within the totality of what the HEI offers. Conversely, some providers who work in larger HEIs feel that the particular character and requirements of ITT are less well understood at whole institution level. All are agreed that funding – and the costs of sustaining effective school partnerships in particular – impose constraints on provision. In some areas, there is also evidence of a growing reliance on part-time appointments. A further review of strategies to rationalise provision (resulting in fewer but stronger providers) might help to increase the financial viability of training departments and, at the same time, serve to strengthen research capacity.

38. Consultees made a number of points to be taken into consideration regarding primary intake targets. It has been argued that across the board cuts in primary intake targets might impact disproportionately on providers for whom ITT represents a large part of their business. For example, in the case of one HEI provider, some 47% of staff are directly involved in ITT. It is also argued that the additional income generated by courses that recruit successfully (boosted by the additional trainees who come from England and the Republic of Ireland) helps to subsidise sometimes vulnerable provision for Welsh medium and secondary shortage subject training.

39. Others argue for caution in reviewing primary intake targets because the future need for primary teachers will be boosted by the need to train more Early Years specialists to increase the number and level of qualified staff in early years settings and Foundation Phase classes. These needs are currently the subject of a separate review being undertaken on behalf of the Assembly Government. Another strategy that a review might consider is the expansion of KS2/3 training courses to facilitate flexibility for trainees in gaining jobs in either primary or secondary schools.

Conclusion and recommendations:

40. There is a strong case for the allocation of intake targets in Wales to be informed by a broader and more strategic overview that takes account of a range of contextual factors. A review should advise on how the process might better reflect the relative needs of different phases of education; the evolving pattern of ITT provision across Wales; the wider role of providers in teacher education and training; and their regional role in meeting the local needs of schools and LEAs. In doing so, it would be important for a review to consider the following questions:

- how best can the current process of allocating intake targets be modified to take account of Welsh data on future phase and subject needs?
- what are the strategic implications of planning training for the Foundation Phase?
- what is the scope for KS2/3 training to help redress the primary/secondary imbalance in training provision?
- what might be the impact of sector re-configuration? (for example, the 'Reaching Higher' vision of: '*HE in Wales defined less by institutions than by networks of excellence*' and of '*fluid interactions between institutions, based on a cluster model*')
- how might a strategic rationalisation of ITT provision assist and sustain the HEIs in realising their wider aspirations for teacher education and training and research?

Issue D:	The effectiveness of the arrangements, including <i>incentives to recruit and retain trainees, to produce teachers to meet current and future demand - particularly in shortage subjects, including teaching Welsh as a second language, and for Welsh medium provision</i>
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INCENTIVES

Current situation:

41. Consultees were invited to consider the impact on recruitment and retention of trainees of the range of current financial incentives:

- Training Grants (£6000)
- Teaching Grants (£4000 taxable) for trainees in priority subjects
- Progressive re-payment of teachers' loans (RTL) pilot scheme involving re-payment at a rate of 10% per year over the first 10 years of teaching in

priority subjects, including Welsh

- Use of strategic funding initiatives, including money for providers to use to increase access (hardship funds and marketing)
- Taster schemes (school experience for undergraduates)
- Welsh Medium Incentive Supplement (£1200 payment) to boost the Welsh language skills of those intending to train through the medium of Welsh

Commentary on the views of consultees:

42. It was generally agreed that trends in applications and recruitment show a discernible impact from the introduction of financial incentives such as training grants and teaching grants. Some consultees also expressed the view that such incentives have helped to broaden the base from which prospective teachers are drawn, and that they can attract to teaching some particularly gifted individuals in much-needed shortage subjects who might not otherwise have considered a career in education. It is also recognised that any potential changes or differences in the kind and level of incentives offered in England compared to Wales would be likely to have a significant impact on recruitment.

43. Nevertheless, the majority of consultees tend to regard the strategy of offering financial incentives very much as a 'stop-gap' solution rather than as the long-term answer to the problem of under-recruitment in shortage subjects. The reservations expressed included concerns that:

- financial incentives were innately unfair, divisive and discriminatory;
- they did not ensure quality or commitment in those recruited;
- while they increased the flow of students into training, there was no guarantee that all the entrants attracted by such incentives were intending to make a long-term career in teaching.

44. Consultees suggested that greater recognition of training by accrediting PGCE and subsequent CPD activity within the National Qualifications Framework (NQF) might also act an incentive for teachers to remain within the profession.

Conclusion and recommendations:

45. Given the high level of demand and the salaries available from outside teaching for graduates in the priority subject areas, there seems little alternative, certainly in the short term, to the use of financial incentives. Nevertheless, a review should consider evidence from the evaluation of current schemes, particularly about the longer term impact of the schemes on recruitment. The current financial bursaries and grants cost approximately 13 million pounds a year in Wales. It may be that the most effective use of financial incentives would be to give more emphasis to rewarding staff in schools with a proven commitment to teaching, for example by rolling out and extending the RTL pilot scheme, and giving proportionately less emphasis to incentives for new trainees. A review therefore needs to:

- evaluate findings on the longer-term impact of different financial incentives on both the recruitment and retention of staff in priority subjects.

RECRUITMENT

Current situation:

46. The services of the TTA are used to secure marketing and recruitment to the teaching profession generally through media campaigns, website and general information about pathways and courses available. In addition, there is one regional TTA adviser for Wales, based in UWIC, who works to advise and support HE providers on the marketing of ITT provision and recruitment at local level and in shortage areas. As part of the innovation fund, HEFCW makes some grants available to providers for marketing courses and funding student access.

Commentary on the views of consultees:

47. Consultees put a strong case for improving the quality of information about routes into teaching in Wales. Many consultees stressed the need for a broader strategy to raise the status of teachers and to make teaching attractive as a profession attractive as a profession and to minimise the loss of good trainees and young teachers from the profession:

- positive media coverage that enhances the status of teachers;
- continuing implementation of pledges on class size;
- emphasising opportunities for career progression and CPD;
- successful implementation of new workload agreements and other measures aimed at minimising bureaucratic burdens.

48. Consultees were divided about whether improvements might be achieved more effectively by securing supplementary or additional recruitment functions in Wales, an expansion of the role of the TTA regional officer or by a full transfer of the TTA recruitment functions to a body in Wales. Some consultees expressed anxiety about the costs of 're-patriating' the TTA function and getting a 'second-class service' in terms of the global media recruitment campaign. However, the great majority were in favour of reviewing strategies for publicising and promoting the Welsh dimension of teaching in Wales in terms of curriculum, culture, language, geography and, not least, the distinctive educational policy agenda.

Conclusion and recommendations:

49. The services provided by the TTA have secured coverage in Wales of some high quality media advertising for teaching as a profession. However, the current arrangements and the division of responsibilities have not been as effective in highlighting the distinctive opportunities for teaching available in Wales, or in focusing sufficiently on areas of greatest need. A number of developments are in train which should go some way to addressing the issues raised. The Teaching and Leadership Division is engaged in working through arrangements with the TTA to enhance the treatment of Wales-specific issues. They are also developing a Teaching and Leadership website, and a further website on teacher training recruitment is planned by the Teacher Training Recruitment Forum (TTRF). In the context of these positive developments, a review should consider and advise on:

- the relevance and impact of the TTA services secured for Wales through the Assembly Government contract;
- effectiveness of current strategies to modify arrangements with TTA and to enhance the role of the TTA Regional Officer;
- ways to resource and enhance production of marketing literature specific to the opportunities and distinctive context of teaching in Wales;
- the potential advantages and costs of transferring responsibility for recruitment to another body in Wales;

- exploring other means of promoting teaching in Wales.

SHORTAGES

50. The national data on vacancies shows that the teaching workforce is more stable in Wales than elsewhere and the number of unfilled posts (0.4%) is lower than in England as a whole and also lower than any individual English region. However, it is argued that shortages are reflected not only in quantity of unfilled posts at a given time, but also in the numbers of applications for posts and the quality of resulting shortlists.

51. Many of the difficulties encountered by schools and LEAs are specific to particular regions. Shortages in secondary specialist subjects and in Welsh and Welsh medium teachers are a real concern for headteachers in some parts of the country, much less so in others. The picture painted by local education authorities and headteachers is one of reduced quality in terms of the numbers, qualifications and experience of applicants in many areas, including for key management and headship posts. Providers suggested that one strategy that might be considered is an expansion of degree qualifications that combine a main subject qualification with an education element plus QTS (eg B.Sc. Science and Education Studies).

Conclusion and recommendations:

52. One key strategy for meeting shortages in priority areas is the development of more flexible routes into teaching, including the GTP. This is addressed in section 2.8. Other areas for a review to consider include:

- identifying regional needs and enhancing the current strategy for targeting marketing and recruitment accordingly;
- developing a strategy for recruitment involving a mix of non-traditional and flexible training routes to attract mature entrants.

WELSH AND WELSH MEDIUM

Current situation:

53. Overall GTCW figures show that, 'between 1996 and 2001 the percentage of first year ITT students in Wales who undertook courses that enabled them to teach bilingually increased from 11% to 21%.' The number of entrants to primary training is satisfactory, but there remains a pattern of shortage, largely as a result of where teachers are willing to live in order to find posts. So, for example, Welsh-medium primary schools in the Welsh-speaking heartlands and in Cardiff have little difficulty attracting large fields, but schools in the upper valley conurbations and eastern side of the country tend to attract far fewer applicants.

Commentary on the views of consultees:

54. Despite the overall increase, the evidence from schools representatives and ITT providers suggests that the pool of prospective Welsh and Welsh medium teachers is insufficient to meet future needs, particularly in Welsh as a second language and in a number of other secondary subjects. Consultees felt that this largely reflected the small number of those following A-level or other courses through

the medium of Welsh and subsequently taking degrees with a Welsh or bilingual element.

55. In general recognition of the need for stronger strategic direction and joint planning for the development of Welsh medium provision in HE, a Welsh medium steering group has been established, chaired by Andrew Green. The terms of reference are comprehensive, encompassing:

- development, implementation and monitoring of a national strategy;
- ensuring coherence between institutions and strengthening the interface between post-16 sector providers and HE.

56. While these terms of reference rightly apply across the HE sector in Wales, it is felt strongly that there needs to be a clear and discernible focus on ITT within the broad strategy. Consultees point to a need for the central collection of data (from individual LEAs or other sources) to enable a more accurate mapping of the current bilingual workforce and projected numbers of pupils receiving bilingual education. There is a strong feeling that there should be specific Welsh medium secondary subject training, located mainly in single centres of excellence in the north, west or south. It is argued by some that, while some subjects might initially be undersubscribed, knowing that it was possible to continue their studies at a higher level would of itself be an incentive for students aged 16+ and 18+ to continue studying through the medium of Welsh.

57. An alternative view was expressed by some consultees who considered that some Welsh speaking students would be deterred by having to make an 'all or nothing' choice to train through the medium of Welsh. Where specialist Welsh medium ITT provision was not viable, it was thought that a more effective strategy might be to develop more mixed language provision in which Welsh speaking students might follow some elements of training in English and others in Welsh. Where the two groups agree is that provision should be planned systematically and not organised on an ad hoc basis depending on the linguistic balance of the students who happen to arrive on the course.

58. Some teacher and headteacher organisations expressed the view that current strategies that involve incentives and limited training to enable Welsh speakers to teach through the medium of Welsh are not always successful. Not all those who make the transition from English medium to Welsh medium teaching do so willingly and not all achieve the written (or oral) standards of Welsh that would normally be expected. In the view of these consultees, a more radical review of current arrangements is required involving all LEAs, providers and other partners with an interest in promoting bilingualism.

Conclusion and recommendations:

59. A priority for any review should be to advise on the best means of developing a national strategy for identifying and meeting the demand for teachers able to work through the medium of Welsh. Many bodies currently have a strong interest in this, not least HEFCW, providers, LEAs and the Welsh Language Board. At the least, an effective strategy should involve bringing together information about the current trends and future development of bilingual education from the education strategic plans of the 22 local education authorities. In mapping existing provision and forecasting needs, it may also require a more accurate distinction to be made between those whose oral and literacy skills currently enable them to teach through the medium of Welsh, those able to speak – but not to teach - in Welsh, and those who might teach through the medium of Welsh with the benefit of 'sabbaticals' or other forms of intensive training. Advice is needed on:

- the composition and role of the most appropriate body to undertake the strategic planning function;
- mechanisms for mapping existing needs and resources;
- strategies for increasing Welsh medium training provision and take-up;
- ways to increase the proportion of trainees taking some or all elements of their training through the medium of Welsh;
- findings from the current evaluation of the impact of Welsh Medium Incentive Grants.
- agreement on strategy to enhance the status of Welsh medium provision in the context of the Assembly Government's aspirations for a fully bilingual society

Issue E:	Means of increasing diversity by offering ITT provision that is attractive to under-represented groups and the disabled
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Current situation:

60. The profile of the teaching profession in Wales does not currently reflect that of the overall population in terms of gender, ethnic diversity and access to teaching for people with disabilities. This is illustrated in broad terms by the figures in the table below.

		General population in Wales
% teachers in Wales from minority ethnic groups	1%	2%
% 1 st Year trainees with a disability	4%	11%

While the overall proportion of female to male ITT applicants is around 75%, this proportion rises to over 85% on primary courses, and only a tiny number of these train to work in the Early Years and Key Stage 1. In practice, this means that children are unlikely to encounter any male classroom teachers until they reach Year 3 or beyond.

Commentary on the views of consultees:

61. Consultees agreed that, while the reasons for the continuing decline in the number of male applicants for primary training was understandable, it was to be regretted. The gender issues are similar to those in other 'caring professions'. However, the context in teaching is one of child protection and a steady rise in accusations of misconduct. Each of the main teacher unions in Wales reported a regular caseload of allegations at a rate of 3-4 per week. The vast majority of these were shown to be unfounded. Nevertheless, given the impact of procedures on those involved, they were thought to be a strong disincentive to men considering working with children in the younger age range...

Conclusion and recommendations:

62. More needs to be done to increase access to teaching for a wider range of potential trainees and of increasing diversity in the workforce. This is needed for a variety of reasons in order to increase equality of opportunity for potential applicants,

and also to help raise the achievement and aspirations of pupils from under-represented groups who might consider teaching as career. Many of the comments received relate to the potential of expanding routes into teaching to attract mature entrants and those wishing to move to teaching from other career backgrounds. The traditional undergraduate and PGCE routes are thought to pose unnecessary obstacles for categories of potential trainees. Aspects that a review might consider are addressed in section 2.8. A review should also consider possible strategies to arrest the decline in applications from men for primary teacher training together with the adoption of targets similar to those put in place by the TTA

- strategies to promote teaching as a career for men and to attract more men to train for primary teaching and in secondary arts and language-based subjects;
- ways to widen access ('Reaching Higher')
- investment by providers themselves to meet the needs of disabled and under-represented groups
- need for more innovative approaches to meet the needs potential trainees with suitable qualifications in non-traditional subjects;
- take-up and value of the use of undergraduate 'taster' experiences, Foundation degrees and subject enhancement provision in Wales;
- increasing the availability of part-time, distance learning and credit-based qualification pathways.

Issue F:	Strategies to reduce wastage during training
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Current situation:

63. The teacher supply and demand model recognises that there is considerable wastage in the process of training teachers as a result of those who fail to complete their courses or who complete and do not teach or who teach for only a short time:

- about 10% of trainees fail to complete their training (source: HEFCW)
- 30% of those who complete do not proceed to teach (source: STRB, 1999)
- a further 18% leave teaching within three years .

Commentary on the views of consultees:

64. Some 'wastage' should be viewed positively. There is universal agreement that future targets should recognise the principle that exit strategies involving 'counselling out – or sideways movement to other HE courses – for trainees who discover that teaching is not for them, should be seen as a positive alternatives rather than being defined as 'wastage'. In addition, some providers stress the value of ITT as a valid and valuable HE route in its own right - suitable, for example, for those taking up careers involving working with children and young people in other contexts such as caring and social work. Nevertheless, many consultees had not realised the scale of the numbers of trainees who do not go on to teach and agreed a need for a review to address the challenge this poses.

65. There was a positive response among consultees to the Assembly Government's introduction of statutory arrangements for the Induction and Early Professional Development of teachers in Wales. The potential success of these arrangements was linked closely to ensuring a supportive ethos to the processes and

commitment from school senior and middle managers to provide the personal and organisational support needed to motivate and develop new entrants. There was a strong wish to see the new arrangements given backing at all levels so as to eliminate the incidence of some NQTs being denied their right to a modified timetable, reasonable expectations and adequate support and development. There was equally strong support for the aim of encouraging all teachers to become 'reflective practitioners who have due regard for their continuing professional development'.

66. Evidence from exit interviews and other sources suggests that the most common reasons for non-completion of training are related to trainees' financial circumstances. While the use of hardship funds goes some way to supporting trainees' experiencing difficulties with, for example, child care, transport arrangements and teaching practice, the amount available can only meet a proportion of the needs that exist.

67. There was general agreement that providers should promote pre-course observation, taster courses and opportunities for subject conversion courses that might help prospective trainees to confirm their commitment to train as teachers.

68. Several consultees pointed to arrangements in Scotland where successful newly qualified teachers are entitled to a teaching placement in order to complete their induction year. The scheme is intended to ensure consistency and a high level of support for newly qualified teachers, all of whom are assured of a maximum .7 contact timetable in their first year. New teachers are allowed to express preferences as to where they would like to teach, but are not guaranteed an induction year at or near their home. The arrangements keep wastage well below the rates in England and Wales and the great majority of new entrants in Scotland follow this route into the profession.

69. Some teacher unions linked difficulties in newly qualified teachers obtaining posts to the fact that many schools do not have final confirmation of their budgets in time to recruit before the end of the academic year. This is thought to explain a 'scramble for jobs' as late as August each year and disappointment for some trainees who fail to find jobs in their first year after training. Another issue raised concerned the status and entitlement of new teachers taken on by LEAs or individual schools to provide supply cover. It was argued strongly that arrangements for induction and support should be extended to this group as of right.

Conclusion and recommendations:

70. Even allowing for the appropriate decision by some trainees and NQTs that teaching may not be for them, the scale of wastage is high. A review should take account of relevant evidence, for example on the success of different training routes, and advise on a range of strategies for reducing the loss of potentially talented teachers during training and subsequently. The positive response to the Assembly Government's policies on supporting NQTs suggest that the strategy is well aimed and it will be important to monitor implementation of the statutory arrangements for induction to see what lessons can be learned. Other aspects for a review to consider include:

- roles and accountability for tracking the impact and outcomes of induction and support arrangements on recruitment and retention.
- strategies to extend opportunities for prospective trainees to gain pre-course experience of working in the classroom.
- models of training that guarantee an initial teaching post to enable trainees to complete their induction year.

Issue G:	The accessibility and spread of ITT provision across Wales by training offered identifying where there is potential under or over provision and taking into account any issues arising from reconfiguration in the ITT sector such as amalgamations of providers or collaborative working arrangements
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Current situation:

71. For a number of years, there has been a fairly stable pattern of ITT provision across the eight HE providers. Additional efficiency and flexibility has been achieved through the development of rationalisation and the introduction some collaborative arrangements, albeit on a modest scale. As a result of movements towards a more general re-configuration of HE provision in Wales, there are both firm plans and further proposals under consideration that will result in a reduction in the number of separate ITT providers.

Commentary on the views of consultees:

72. A number of consultees, including some providers themselves, put forward the view that the small size of training departments in Wales (relative to those in England) causes problems that need to be addressed. These include: difficulties in maintaining the viability and diversity of specialist ITT course provision; complications in managing and maintaining school partnerships; and a low level of research activity and support for schools and LEAs to complement ITT. Some developments have helped to eliminate unnecessary duplication of provision between providers, although it is thought that there may be further scope to rationalise in some specialist areas.

73. Consultees also thought that over-reliance by providers on the full-time undergraduate and graduate training pathways restricted the scope for attracting a more diverse range of applicants. Significant expansion of the GTP, for example, would necessitate some contraction of numbers on traditional modes of training and therefore underline the need for further rationalisation.

74. On the other hand, a number of current ITT providers argue that they are particularly responsive to the local and regional needs of schools and LEAs in their area. Similarly, with increasing numbers of trainees living at or near home, departments feel that they recruit particularly well from local schools and colleges – and that a high proportion of their trainees get jobs back in the same locality.

75. Providers and other consultees therefore agree that a reduction in the overall number of training departments should not detract from the availability of training provision, but that rationalisation should be used as an opportunity to enhance the provision of courses and ensure that there is:

- access to a broadly even spread of regional provision across Wales;
- stronger and more specialised training provision in subjects and areas (such as Welsh medium training) where it has been difficult to ensure viable numbers;
- scope for fewer, larger providers to invest in strategies to attract trainees from more diverse backgrounds (possibly along the model of specialist GTP training schools);

- rationalisation of the patterns of partnerships between schools and individual ITT providers
- consequent strengthening of support for trainees;
- further opportunities to strengthen the research base of departments and to develop 'centres of excellence';
- increased support for teacher-led development and resources made available for CPD.

76. While some consultees thought that regional links were a strength of the current pattern of provision, it was pointed out that schools in Powys were less well served by the regional network. While the current pattern includes some partnerships between schools and HEIs in Wrexham and Newport, in other cases difficulties in terms of proximity had led Powys schools to look towards partnerships with English consortia.

Conclusion and recommendations:

77. Accessibility and the location of ITT provision in Wales should be a major focus for a review. A key consideration will be the impact of the wider reconfiguration of the HE sector. It will be equally important for a review to weigh up the potential benefits and costs of having fewer but larger ITT providers, possibly with a stronger regional identity and links with schools and LEAs in their locality. Particular issues for consideration should include:

- deciding the optimum number of departments to provide training, given the overall re-configuration of HE sector institutions in Wales;
- drawing up an overall map of ITT provision across Wales taking account of the collaborative arrangements being developed between providers;
- advising on the development of 'regional centres' with the capacity to maintain excellence in specialist areas and closer partnerships with local LEAs and schools;
- drawing up a strategy (based on agreed needs) for the location and scale of phase and specialist ITT to be delivered through the medium of English, Welsh and flexible bilingual pathways

Issue H:	The availability and potential for more flexible or different types of training provision (e.g. SCITTs - school centred ITT; Open University courses; etc.) and the operation of the graduate and registered teacher training programmes (GTP and RTP).
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Current situation:

78. The great majority of ITT provision is by the traditional undergraduate and graduate routes to QTS. There is very little use of work-based, non-traditional or flexible training in Wales. Current provision of GTP training amounts for about 50 places per year. This represents about 2.5% of the annual total of ITT places in Wales. Participating schools receive £13,000 towards the salary costs of the graduate trainee and a further £4,000 is provided to support training and mentoring. There is currently no use of either SCITTs or the OU training courses in Wales,

although, in both cases, a small number of trainees are placed in Welsh schools from courses that are administered from England.

Commentary on the views of consultees:

79. The use of the GTP in Wales contrasts strongly with the approach taken by the TTA in England where there has been a large increase in work-based ITT provision. The GTP now accounts for some 5,000 places a year in England (some 14% of the total ITT intake). This policy is underpinned by the conviction that GTP and other flexible training routes are an effective way to increase diversity and plug shortage areas. According to the TTA:

- the average age of GTP trainees is 37;
- trainees come from a broader social and ethnic background than those on traditional programmes;
- 97% of trainees complete their training successfully;
- some schools are emerging as 'specialist training institutions' with as many as 20 GTP trainees;
- Following evaluation of the scheme by Ofsted, HE providers are playing an increasing quality assurance role in GTP provision.

80. Evidence from the expansion of the programme in England suggests that there is demand for the GTP and other flexible routes from potential applicants, but a continuing need to remove barriers to access and widen opportunity. Other provision includes opportunity for teachers from overseas to achieve QTS (mainly seen as a response to shortages in London and the south-east) and Foundation Degrees (for example in mathematics and science subjects) leading to the award of QTS for candidates whose prior qualifications make them eligible to teach.

81. Schools and HEIs in Wales directly involved in GTP provision offered very positive evaluations of the training and the potential of expanding the programme for increasing diversity and meeting identified needs in shortage areas. Consultees felt it important to take steps to ensure that potential applicants were not being deterred from applying for ITT, either by a shortage of available alternative routes into teaching, or by inadequate or hard-to-access information about opportunities. Evaluations carried out by schools mirror those of TTA in that trainees have a strong commitment to teaching subsequent to training. A big advantage is the potential of GTP to help increase numbers in key shortage areas and to increase diversity and gender balance. Similar views were expressed about the desirability of increasing the portfolio of training options to provide greater variety through distance learning (OU) and/or flexible part-time routes.

82. Some consultees had minor reservations about whether the GTP could have a significant impact on shortage areas and diversity. Others pointed out that in a year when only three mathematics graduates trained to teach through the medium of Welsh, three additional trainees recruited to the GTP would represent an increase of 100%.

83. Representatives of teacher and headteacher organisations representatives underlined the need to have clarity about quality assurance arrangements to ensure real equivalence in the standards required to achieve QTS on traditional routes and work-based or flexible modes of training. A review would need to take account of Estyn's evaluation of the GTP in Wales and possible strategies for ensuring that providers act on recommendations to reflect best practice.

84. Consultees also suggested that a review should assess the merits of other flexible training routes, including: those such as the OU scheme that utilise distance learning; part-time or modular/credit-based schemes that might offer training over a longer period to meet the needs of entrants with family or other commitments that

preclude following a full-time course.

Conclusion and recommendations:

85. There are strong arguments for an expansion of the GTP and more use of other non-traditional routes into teaching. These might well help to address some of the key objectives in the terms of reference, namely, increasing recruitment and retention in priority subjects and increasing diversity in the workforce. Feedback from a range of consultees also suggests that teachers with experience of employment outside education bring potentially valuable ideas and skills into schools. Mature trainees generally show high levels of commitment, both in training and subsequently in schools. While it is right to ensure that current standards are met by all entrants, a review should consider how support for non-traditional routes into teaching can help to overcome some of the barriers and constraints that mature trainees often face. A review should consider:

- the most desirable balance to be achieved between traditional and non-traditional training routes to achieving Qualified Teacher Status in Wales;
- the best mechanism for administering an expanded programme of flexible training routes within the overall allocation of intake targets;
- the best national and regional strategy for piloting and extending new pathways such as pre-ITT subject enhancement programmes and 2-year subject conversion PGCE courses.

PART 3: Recommended terms of reference, timing and methodology

REVIEW MODEL

86. Consultees offered a variety of models for the kind of review that might be most effective. However, while there was strong agreement on some of the aims and principles that should underpin any review, there was little consensus or strong feeling about the precise details of the most appropriate model for a review. The possible models suggested included the following options, although there were also suggestions that a combination of one or two of the approaches listed below (for example numbers 2 and 5) might offer the best solution:

87. (i) A Policy Review by the Education and Lifelong Learning Committee

Potential advantages:

- using a similar format to that employed in the overall review of HE (*Reaching Higher*) or the Welsh Language (*Iaith Pawb*) would achieve completeness;
- direct review by the ELL Committee would signal the importance of ITT and give high status and wide access to the review process;
- involvement in the process would give AMs a clear picture of the links between ITT and other aspects of policy development (eg. *The School of the Future, the Foundation Phase and 14-19*)

Possible disadvantages:

- the ELL Committee's immediate programme and priorities already determined;
- less frequent meetings of the Committee would result in protracted review;
- impractical to expect AMs to be able to give a review the dedicated time required to cover all aspects in sufficient depth.

88. (ii) Appointment of a high profile Chair and Representative Review Group, supported by a secretariat provided by the WAG

Potential advantages:

- would give high status to the review
- ensure input from senior representatives of all sectors and interested parties

Possible disadvantages:

- the 'nitty gritty' work of the review would still need to be undertaken by specialists and/or members of a secretariat closer to the ground;
- implies the goodwill and availability of participants working at or near executive level in their own organisations

89. (iii) Commissioned review by specialist adviser(s) supported by a steering committee and/or representative reference group

Potential advantages:

- one or more disinterested 'experts' (possibly secured through secondment), would command widespread respect;
- given a manageable brief and adequate secretarial and administrative support, they might also have sufficient dedicated time to carry a review through to a conclusion in reasonable time;
- regular reporting to a steering committee might help to set and maintain strategic direction;
- consideration by Minister and/or ELL Committee could ensure public access to outcomes

Possible disadvantages:

- potential difficulty of finding experts with the right combination of credentials, credibility and availability(at quite short notice);
- possible resource implications

90. **(iv) Contracted out review on the basis of invitations to tender**

Potential advantages:

- convenience of having the entire work undertaken by a single agency with contract steered and monitored by Teaching and Leadership Division;
- might yield the quickest result in terms of timescales;

Possible disadvantages:

- finding an agency with credibility, sufficient distance from the sector to be objective and yet with enough familiarity with the complexities of the Welsh and Welsh language context;
- could be an expensive option.

91. **(v) Creation of an advisory forum composed of existing representatives of**

HE providers, schools, LEAs, HEFCW, GTCW and WAG Teaching and Leadership Division, to review evidence and report to the Minister for Education and Lifelong Learning on a proposed strategy and recommendations for future ITT provision.

Potential advantages:

- members of the review group would be immediately familiar with the issues and have close involvement in addressing the challenges facing ITT,
- they would have good knowledge of review work completed, ongoing work and piloted initiatives.

Possible disadvantages:

- some potential for conflict of interest between different partners and difficulty for members in standing back to gain an objective overview;
- all those involved are busy and, without considerable resources, would find it difficult to combine review with other duties;
- a group with such diverse interests would need strong chairing and direction.

TERMS OF REFERENCE: OUTCOMES

92. Any review of ITT should start with a broad consideration of the future needs of schools in Wales in the context of policy development. This should include taking account of the development of a distinctive curriculum in Wales at virtually all key stages, of the need to increase school's capacity for bilingual provision, of the developing role of teachers in working with other support staff and of the contribution of ICT to teaching and learning as well as in school administration.

93. For a review to be productive, there also need to be clear outcomes that are specific, practical and manageable – the establishment of coherent and strategic training plan to meet the needs of schools in Wales. Such a plan needs to be based on agreed data and definitions of shortage, take account of the strands of work already undertaken and being undertaken currently, include a clear map of the nature, location and modes of provision required and reflect a good understanding of the resource implications.

94. Any review should have the resources in terms of time, expertise and access to evidence to propose a preferred model for the future of ITT in Wales. This needs to be based on a comprehensive and coherent strategy and underpinned by practical and specific recommendations. Key aspects of provision that need to be addressed include:

- **The kind of training that will best match the future needs of schools in Wales:**
 - numbers of teachers required in relation to predicted demographic changes in pupil population and the best available data about the current workforce in Wales;
 - the portfolio of ITT needed in terms of phase training (EY, primary, 8-14, secondary, 14-19) taking account of new policy implications;
 - specialist focus (possible extensions to and developments of the traditional secondary subject base to include more subject combinations (second subjects), vocational specialisms, PSE as a specialism; special educational needs; and fast track management training;
 - language medium: scope for a comprehensive map and dedicated Welsh medium training and bilingual training (mixed units of English and Welsh) in secondary courses, and access for Welsh learners and those converting from English-medium to Welsh medium teaching;

- **The number and location of HE providers best suited to provide for these needs, taking account of:**
 - current evolution of collaborative arrangements and general reconfiguration in the HE sector in Wales
 - rationalisation of the current map of school partnerships and related administrative and quality assurance arrangements;
 - the wider role of HE providers, and their strategic partnerships with local authorities and schools, in supporting the full continuum of initial teacher education and training, induction and CPD, classroom-based and other research, and contributions to NPQH and other leadership training;

- the impact of a possible expansion of GTP and alternative training routes on total provision.
- **Strategies to stimulate recruitment and improve retention specifically to linked to identified needs and shortage areas in Wales:**
 - methodology for basing future strategy more closely on best available data about current and future workforce needs at national and regional levels;
 - advising on ways to strengthen the general marketing of teaching as a profession, drawing attention to positive improvements in conditions and professional development, and suggesting how responsibility for this might be extended, possible through enhancing the role of the current TTA Regional Adviser;
 - reviewing the current TTA MoU with a view to increasing the Welsh dimension/ marketing the distinctiveness of teaching opportunities in Wales and how this might be best achieved;
 - advising on the most productive balance between the use of traditional training routes (Undergraduate and PGCE), work-based routes (GTP and RTP) and flexible training routes (OU, part-time and modular routes) as part of a coherent strategy to increase diversity, attract more mature entrants and meet specific shortages;
 - advising on ways to increase the pool of potential future teachers by strengthening and supporting the efforts of schools to raise the aspirations of younger students to consider teaching as a career, and to continue their study of mathematics, science, MFL and technology, IT and other shortage subjects through the medium of both English and Welsh post-16 and beyond.

METHODOLOGY

95. Methodology will partly be determined by the chosen model. Consultees urged that a priority for any review should be to take account of evidence and findings from studies and reviews already completed, to work closely with groups currently engaged in researching aspects of provision relevant to ITT and to ensure coherence with such work by cross-referencing findings and outcomes. To fail to do this would be to run the risks of duplicating work unnecessarily, sidelining important existing evidence and of different groups coming up with contradictory proposals. It is therefore regarded as essential, whatever model is adopted, for a review to have an important co-ordinating function. Other aspects of work will need to involve:

- **data collection** and research on demand and supply in Wales, with particular attention to the way that 'shortages' are defined and how to bring together our best information about the demand and supply of teachers in the Welsh-medium and bilingual sector;
- drawing together evidence from a wide range of **published surveys and reviews**
- taking evidence from those involved in **current action-based research and development** activities about models of training.
- learning from experience of workforce planning in **other countries**; particular mention was made of arrangements in Scotland and, possibly, of approaches

to ITT in Australia and New Zealand;

- **written submissions** on the terms of reference invited from interested parties;
- key bodies invited to present **oral evidence**
- **wide consultation** on the basis of initial proposals.

LEADERSHIP AND MEMBERSHIP

96. Most consultees agreed that all relevant bodies needed be represented and to play as full a part as possible in the review. However, there was also widespread recognition that leadership of the review group needed to be seen to be impartial there was a danger that leadership, either by the ITT sector, an individual provider institution, LEA and teacher representatives or by regulatory bodies and agencies would inevitably involve a conflict of interests. Careful consideration needs to be given to the appointment of the chair/ or expert adviser in order to ensure that the person appointed has credibility from having served in a senior role within at least one of the relevant sectors involved in ITT. On the other hand, they must not be seen to have such close associations with any one sector as to find it difficult to transcend local loyalties and be impartial.

Key members of any steering group should include representatives of:

UCET Cymru

The GTCW

HEFCW

Estyn

ADEW

One representative of headteachers associations

One representative of teacher associations

In addition, it was argued strongly that close attention should be given to the voices of trainees themselves. This might be achieved either by forming a focus group composed of a sample of:

- undergraduate trainees
- PGCE trainees
- School-based trainees on the GTP and/or RTP
- NQTs on induction year
- NQTs in second year of teaching

Ex-officio (secretariat):

DfTE, Teaching and Leadership Division

HMI Lead ITT team specialist

TIMING

97. It was considered that, while the need for a review was urgent, particularly to address the imbalance in primary/secondary intake and shortage subjects, it should not be rushed. The review should be undertaken during the calendar year 2004 with a deadline to report on proposals for consultation with the sector and all interested parties by December 2004.

98. As pointed out in the opening section of this report, it was also considered essential that any review should proceed in step with, and be informed by, relevant

work recently completed and parallel work being undertaken by other bodies or groups on specific aspects of ITT.

99. It was also recognised that arrangements likely to be affected by re-configuration in the wider HE sector would take considerable time to feed through.

ANNEX 1: Other issues raised by consultees

100. During discussions, consultees raised a number of issues which, while closely related to wider aspects of teacher education and training, recruitment and teacher supply, were not strictly within the scoping study terms of reference. Some of these have already been mentioned briefly where they formed part of a broader case for a review. Others are listed below.

Promoting take-up of priority subjects at A-level

101. Underlying discussions about shortages in the supply of secondary subject specialists there was a general recognition that this problem can only be addressed fully by increasing the available pool of graduates. This, in turn, can only be done by attracting more students to continue their study of priority subjects at A-level. The worrying facts are that, in subjects such as Modern Foreign Languages, the take up of languages is still decreasing. A key recommendation was for all concerned to explore ways in which ITT and other HE providers might work with schools and colleges to increase awareness of teaching opportunities to reverse the downward trend in take up of key subjects at A-level. Obvious examples included encouragement of female students to continue with the study of mathematics, science and technological subjects, and of male students to study Welsh, English and modern foreign languages.

Second subject teaching

102. A number of consultees mentioned the strategy of strengthening second subject teaching (very much the norm in Scandinavia and a number of other European countries), as one way of increasing flexibility in the deployment of staff and specialisms in shortage areas.

Special educational needs

103. Feedback from a number of consultees, including teacher organisations and LEAs, suggested difficulties in attracting experienced teachers with specialist qualifications in special educational needs. There is evidence from England of the advantages of piloting SEN as a main specialism, albeit in conjunction with another curriculum subject or subjects, within ITT courses.

Candidates for headship

104. Although not strictly related to ITT, a number of consultees pointed to actual and future potential shortages in applications for headteacher posts as a concern. It is thought that the requirement for future applicants to have completed the NPQH may result in a further contraction of short lists and an assumption that all NPQH qualified applicants will have the necessary experience and quality to lead schools effectively. The 'fast track' programme that operates in England is thought to be one response to these concerns and, while not necessarily recommending that Wales should follow suit, it was thought that a review should consider ways to strengthen progression along the continuum from ITT to leadership training.

ANNEX 2: Terms of reference

REVIEW OF INITIAL TEACHER TRAINING PROVISION IN WALES: SCOPING STUDY

Terms of reference

This will be a scoping study to be carried out prior to a full scale review of initial teacher training (ITT) provision in Wales.

The study will explore the issues set out below with the aim of:

- recommending whether a full scale review is needed; and if so,
- what its detailed terms of reference should be; and,
- how the review might be carried out in terms of its timing and methodology.

The objective

To examine the provision of ITT in Wales and possible alternative routes into teaching, with the objective of determining how the supply of newly qualified teachers might more closely match the needs of schools in Wales.

Issues

The scoping study will take the following into consideration:

- the adequacy of the current Wales/England model for setting overall intake targets for ITT
- the arrangements for setting intake targets and funding ITT provision in Wales
- the methodology for setting appropriate intake targets that match Welsh needs (taking account of cross-border movement and the need to maintain viable courses)
- the effectiveness of the arrangements, including incentives to recruit and retain trainees, to produce teachers to meet current and future demand - particularly in shortage subjects, including teaching Welsh as a second language, and for Welsh medium provision
- means of increasing diversity by offering ITT provision that is attractive to under-represented groups and the disabled
- strategies to reduce wastage during training
- the accessibility and spread of ITT provision across Wales by training offered - identifying where there is potential under or over provision and taking into account any issues arising from reconfiguration in the ITT sector such as amalgamations of providers or collaborative working arrangements
- the availability and potential for more flexible or different types of training provision (e.g. SCITTs - school centred ITT; Open University

courses; etc.) and the operation of the graduate and registered teacher training programmes (GTP and RTP).

Timing

The study is expected to start from 13 October 2003 and to take the equivalent of a total of 19 days to complete.

Outputs

A report to be presented to Teaching and Leadership Division before the end of December 2003 to include:

- the findings from the structured interviews, with a commentary covering the issues above and any other matters that might arise from the interviews
- based on that outcome, a statement of the case for a full review of ITT provision
- recommendations (if it is concluded that a review is desirable) as to the timing and methodology for carrying out that review.

ANNEX 3: Short bibliography

The scoping study has been informed by the following published papers, surveys and reports brought to the author's attention and referred to as the basis for discussion with consultees.

DfES (1997) *Teacher supply and demand modelling: an explanatory paper*

Edwards, Richard LL.P (2002) *The Recruitment of Men and Ethnic Minority Students to Primary PGCE Courses in England and Wales*, HEFCW/ University of Wales, Swansea:

Estyn (2003) *Excellence and Innovation in Initial Teacher Training: A Case study approach*

Estyn (2003) *Annual Report of HM Chief Inspector*

GTCW (2003) *Action Plan for Teacher Recruitment and Retention in Wales*

GTCW (2003, *Review of Teacher Recruitment, Supply and Retention in Wales*, Patrick White, Beng Huat See, Stephen Gorard and Karen Roberts, Cardiff University School of Social Sciences

GTCW (2002) *Recruitment and Retention Survey 2002*

HEFCW, *Corporate Strategy to 2010*

HEFCW, *Corporate Plan 2003-04 to 2005-06*

HEFCW (2003), *Initial Teacher Training in Wales 1996-2002: Summary of Estyn Findings for the Higher Education Funding Council for Wales*

HEFCW (2003), *Initial Teacher Training (ITT) Strategic Funding Mechanism: Outcome of Consultation.*

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Ramsden, Brian (2002) *Patterns of Higher Education Institutions in Wales*, HEFCW/HEW (2002).

Smithers, A and Robinson, P (2002), *Teachers Leaving*, Liverpool University Centre for Education and Employment Research.

Smithers, A. and Robinson, P. (2000) *Coping With Teacher Shortages*, Liverpool University Centre for Education and Employment Research.

Welsh Assembly Government (2003) *School of the Future: Interim report*

Welsh Assembly Government (2003) *Reaching Higher*

Welsh Assembly Government (2003). *Written Evidence to the STRB on Pay and Conditions of Employment of School Teachers*

Welsh Assembly Government (2002) *Iaith Pawb*

ANNEX 4: List of consultees

Acknowledgement and thanks

This scoping study is based on a collation of the views and evidence contributed by representatives of the organisations listed below. In all, the meetings included 80 people from 22 organisations. These included the eight HE providers of ITT. Approximately 30 of the consultees were headteachers or senior school staff/mentors directly involved in the training of teachers. All those consulted gave generously of their time; the author is sincerely grateful for their cooperation and for the willingness of all concerned to share their considerable knowledge, experience and expertise in relation to the recruitment, training, deployment and development of teachers in Wales. It was abundantly evident from the responses received that all share a common concern to achieve the highest standards for learners in schools in Wales and a determination to work together to achieve the best possible training for those who teach, support and care for them.

Organisations consulted

Association of Directors of Education Wales (ADEW)
Bwrdd Iaith Cymraeg
DfES: Teacher Supply and Demand Team
Estyn, Her Majesty's Inspectorate for Education and Training in Wales
General Teaching Council Scotland
HEFCW
National Association of Headteachers Wales (NAHT Cymru)
National Union of Teachers Wales (NUT Cymru)
NASUWT Wales
North-East Wales Institute of Higher Education
Secondary Headteachers Association Wales (SHA Cymru)
Swansea Institute of Higher Education
Swansea University Department of Education
The Teacher Training Agency (TTA)
TTA Regional Recruitment Adviser for Wales
Trinity College Carmarthen
University College of Wales, Aberystwyth
University College of North Wales, Bangor
UCAC
UCET Cymru
University College of Wales, Newport
University of Wales Institute Cardiff

PHYSICAL EDUCATION AND SCHOOL SPORT INITIATIVE BACKGROUND PAPER.

Issue

1. To provide background on the development of the PE and School Sport Action Plan for Wales and a summary of progress.

Background

2. The PE and School Sport Task Force was established by the Assembly Secretary for Education and Children in May 2000 to advise on strengthening the position of PE and Sport in schools.

3. The Task Force drew together a wide range of specialists including representation from local education authorities, LEA advisers, schools, higher education, Estyn, the Sports Council for Wales (SCW), ACCAC, BAALPE-Wales (British Association of Advisers and Lecturers in PE), WLGA and PHAB.

PE and School Sport Action Plan for Wales

4. The report produced by the Task Force "The PE and School Sport Action Plan for Wales" was published for consultation in June 2001. The report was made available to schools, local authorities and sports governing bodies. There was strong support for the key recommendations.

Implementation Arrangements.

5. The Minister for Education and Lifelong Learning welcomed the report and asked the Sports Council for Wales to take the lead in action to address the central recommendations and, in particular, to:

- establish PE and School Sport (PESS) Development Centres across Wales to pilot innovative approaches to the raising of standards of physical education in schools;
 - develop proposals to improve opportunities for those undergoing Initial Teacher Training to acquire the knowledge, skills and understanding required to teach aspects of physical education;
 - develop proposals to raise standards in physical education and school sport by establishing ready access to opportunities for continuing professional development (CPD) in physical education for all teachers.
6. Day to day management of the project is in the hands of a National Development Manager appointed by SCW, supported by a small specialist implementation team and advisory group. The Advisory Group is chaired by Anne Ellis, MBE (Vice Chair of SCW) and draws together representatives from ACCAC, Estyn, the Youth Sports Trust, SCW, the

University Council for the Education of Teachers, British Association of Advisers and Lecturers in PE, the Welsh Local Government Association, Welsh Council for School Sports and Welsh Assembly Government (observer status).

7. SCW has established two sub groups to provide additional support.
 - **Research, Monitoring and Evaluation of Development Centres (DCs)** – to agree a framework for monitoring and evaluation, making best use of SCW school survey data and specialist support and advice to be provided by Estyn;
 - **PE and School Sport Development Centres** – the group works with members of the implementation team to consider how key messages and successes from pilot development centres can be applied across Wales.
8. Welsh Assembly Government officials have regular management meetings with SCW to monitor progress against proposals for this work approved by the Minister for Education and Lifelong Learning.

Progress and Plans

9. The Welsh Assembly Government made £500k seed-corn funding available to the Sports Council for Wales in 2002-03 to establish pilot PE and School Sport (PESS) Development Centres (DCs) to act as a test bed for this work. In October 2002 the Minister for Education and Lifelong Learning announced that further resources would be made available for SCW to take forward implementation of the PESS Plan over a three year period. £1 million was made available to SCW in 2003-04 and a further £1.5 million is available in 2004-05.
10. The main area of work is the establishment of DCs in each local authority area. In addition, there are a range of national projects looking at initial teacher training (ITT), continuing professional development and specialist areas including Health Related Exercise, Gymnastics, Dance and ICT.
11. Good progress was made in the first full year of the project with some 34 DCs in place as at the end of March 2004. SCW's target is to have 2 DCs in place in each local authority by March 2005.
12. Links forged by SCW with local authorities are a key element in this work; with support from SCW, each authority has appointed (from September 2003) a PE and School Sport Co-ordinator. These posts will play a central role in supporting the implementation of the Action Plan and embedding good practice across all schools.
13. Progress is monitored on a regular basis by Estyn. An initial Estyn report submitted in 2003 concluded that there was already evidence confirming that the initiative was having a positive impact on standards in the schools involved in the first 15 DCs established. A further report is scheduled for completion in May 2004.

PE and School Sport (PESS) Development Centres

14. PESS Development Centres bring together a number of schools (primary and secondary) to work with local partners, including colleges, higher education providers, leisure centres and sports clubs to identify and share best practice and to make best use of innovative approaches to the sharing of facilities and expertise. PESS Development Centres have a key role in helping schools to work with local partners to raise standards and improve the range of activities made available to all young people.
15. Each Development Centre, with support and advice from the National Implementation Team, is tailored to local circumstances and it is anticipated that they will take different approaches. What might work in an urban environment may not work in a rural setting.
16. Each model will be evaluated to see what works well both in specific circumstances and across Wales as a whole. For example the PESS Development Centre in Caerphilly has:
 - used secondary schools specialists to enable primary schools to extend and improve the range of activities that they provide for pupils;
 - agreed a common approach to assessment and recording of pupil achievement to support effective transition from primary to secondary school;
 - trained supervisors to promote lunchtime playground games and activities;
 - promoted the wider use by schools of facilities (such as mini-tennis) at both leisure centres and local clubs to widen opportunities for pupils;
 - developed activities targeted specifically at engaging girls aged 13-16 in PE and Sport.

Supporting work

17. The Sports Council has appointed managers for each of the specialist projects with the aim of devising agreed strategies to implement specific aspects of the Action Plan. Progress to date:
 - **CPD (Continued Professional Development).** An action plan has been developed and a code of practice for CPD has been agreed. A register of development opportunities for physical education in Wales and beyond, identifying specific courses and providers (along with contact details and supporting resources where available) has been developed for use by teachers across the country.
 - **ITT (Initial Teacher Training).** An Action Plan has been developed. All Higher Education Institutions in Wales have signed up to the principles and recommendations within the Plan and are working to agree the content for the individual areas of the PE curriculum within ITT - to ensure that trainees are equipped with the necessary confidence, knowledge, skills and understanding to teach PE. This is of particular importance for trainee primary teachers where PE is generally delivered by non-specialist teachers.
 - **Use of ICT.** SCW is drawing on specialist expertise to provide support for

improvements in the use of ICT in the delivery of PE in schools. The project is being developed in two parts with initial recommendations on the use of ICT in PE in relation to performance analysis and assessment. The second part focuses on development of practical guidance for use in schools, leading to development of a national resource (likely to be internet based), and to be piloted in DC schools in 2004-05.

- **Health Related Exercise(HRE).** In partnership with Loughborough University, practical guidance for teachers and support materials has been developed on HRE for Key Stage 2/3. The materials will be piloted in DC schools in the autumn term of 2004-05 with a view to distribution to all schools.
- **Dance and Gymnastics.** The focus is on provision of practical support for teachers in DC schools, including resources and regional INSET.

Links to other initiatives

18. An integrated approach, that makes the link between key policy areas, - including health, education and employment, has been very much at the heart of planning for implementation of the PE and School Sport Action Plan.

- PESS Action Plan complements the *Healthy and Active Lifestyles Framework for Action* and *Climbing Higher, the Sports and Active Recreation Strategy*;
- *Welsh Network of Healthy School Schemes.* Firm linkages have been established with the network of school co-ordinators put in place as part of the Welsh Network of Healthy School Schemes. All schools involved in the DCs have also signed up to the Healthy Schools Initiative.

NOF Funding

19. The Assembly Government and SCW have worked closely with the New Opportunities Fund to ensure that NOF funding - £48m over 4 years for PE and sport in schools - complements the PE and School Sport Action Plan. The NOF funding targets the building of new facilities and refurbishment of existing facilities while the PE and School Sports Action Plan majors on raising standards through curriculum and staff development and the promotion of local partnerships to develop and disseminate good practice.

20. All Local Authorities have received a formula based allocation of the £48m and have agreed with NOF an outline Stage 1 portfolio of projects. Stage 2 detailed applications were submitted to NOF by end March 2004.

SCW role in wider context

21. The Sports Council for Wales also plays key role in ensuring that the PE and School Sport Action Plan complements ongoing initiatives including "Dragon Sport" (promotion of opportunities for extra-curricula and out of school hours sport for 4-11 years olds) "Junior Club Development" (formerly known as Clwb Cymru) and Girls First (which aims to raise the

profile of physical education for girls in secondary schools). Girls First is a particularly important development that aims to halve the gap between girls' and boys' participation levels.