
EVALUATION OF THE GOLDEN HELLO INITIATIVE

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Introduction

York Consulting Limited were commissioned by DfES to assess the early impact of the Golden Hello initiative to improve recruitment and retention of teachers in FE shortage subjects.

Key Findings

- Take up of the initiative has been high and exceeded the profile for the 2003-04 financial year.
- At this early stage, it is not possible to definitively and quantifiably comment on effect and impact. Nevertheless, there is evidence that the initiative is having some positive effects in terms of: recipients feeling more valued and motivated; increased speed of enrolment for an appropriate teaching qualification for some teachers; and some increased recruitment and retention.
- Despite this, there are some negative effects in that the restricted eligibility for Golden Hellos is seen by some as divisive; the payments are not felt to be sufficient to affect longer-term behaviour, and there is a significant degree of deadweight in terms of retention payments to teachers who would have remained in FE anyway.
- In most colleges visited the Golden Hello is operated as a discrete initiative and there is no evidence of variance in approach for different shortage subject areas. Several colleges are operating their own separate approaches to tackle recruitment and retention.
- Several issues emerged in relation to eligibility and design of the initiative, including: the definitions of shortage subject areas are unclear and there is uncertainty as to whether these reflect sector need; the exclusion of individuals with prior teaching experience is questioned by some; and there are appeals to widen eligibility to include non-eligible adult learning institutions, as well as support staff.

Aims

The aims of the evaluation were to:

- assess how effectively the initiative has met its objectives;
- assess the impact on recruitment and retention;
- assess the extent to which colleges have used the initiative and any complimentary approaches to aid recruitment and retention;
- assess the effectiveness of the delivery processes;
- report on lessons learned and make recommendations for improvements.

Background

The Golden Hello initiative was introduced in September 2002 as part of the Government's Success For All strategy to reform further education and training in England. The Learning and Skills Council (LSC) administer the initiative. Golden Hellos are one-off payments to a maximum of £4,000 available to new Further Education teachers in their second year of teaching in designated shortage subject areas. The initiative aims to increase the attractiveness of teaching in the FE sector and increase the recruitment and retention of new teachers. Eligible teachers must hold or be working towards a teaching qualification in line with the Further Education Teachers' Qualifications (England) Regulations 2001.

Methodology

The research was carried out between August 2003 and February 2004. Several methods of data collection were employed:

- preliminary investigation involving desk research and telephone consultations with ten local LSCs;
- a postal survey of Golden Hello recipients;
- ten in-depth case studies of FE institutions.

Main Findings

Take Up

Take-up of the initiative has been high and has exceeded the profile for the 2003-04 financial year. Patterns of take-up are uneven in terms of geographic and subject variables. Differences in take-up are influenced by several factors including word of mouth and marketing.

Despite high levels of take-up, the extent to which this is a reflection of recruitment and retention needs is not clear due to a lack of up-to-date national and local data.

Effect on Teachers

The key effects on teachers receiving a Golden Hello are:

- feeling more valued - over one-half of survey respondents (54%) stated they feel more valued as a result of receiving a Golden Hello;

- job motivation - just under one-third of recipients (30%) agreed that *'my job motivation has increased as a result of receiving a Golden Hello'*;
- perceptions of FE - albeit limited, the Golden Hello initiative is having an effect on perceptions of FE among around one-tenth (14%) of recipients.

Qualitative evidence shows that the issues influencing teachers' decisions to work in the sector are complex, and often a Golden Hello is not the sole or determining factor. In some colleges the Golden Hello initiative is considered divisive as some individuals receive payment and others do not.

The Golden Hello initiative is having a small positive influence on the speed with which qualifications are undertaken and on the types of qualification - i.e. in line with the FE Teacher Qualifications Regulations England (2001).

Impact

It is not possible to definitively or quantifiably measure the impact on recruitment and retention because:

- there is a lack of quantified, national and local data documenting the scale of need in the sector and by subject area;
- it is too early to be able to evidence an effect on recruitment;
- the definition of recruitment and retention is loosely defined.

However, the majority of survey respondents (60%) agreed that *'Golden Hellos are an effective incentive in improving recruitment and retention in FE'*.

Recruitment: The majority of early recipients consulted had entered FE prior to being aware of Golden Hellos. Nevertheless, 10% of survey respondents stated that the availability of a Golden Hello had influenced them to work within FE.

Mixed views were obtained from colleges on the size of the pool of applicants applying for vacancies, with some experiencing an increase in the number of applications in shortage subject areas and others a decline.

Retention: Golden Hellos are having an effect on retention of some teachers. Around one-third of survey respondents (31%) indicated the payment had influenced them to stay working in FE. However, qualitative evidence suggests that payment of a Golden Hello is not sufficient in itself to generate long-term commitment. Other factors exert greater influence and several colleges identified low pay within the sector as the more fundamental constraint. Furthermore, there is no requirement for Golden Hello recipients stay for more than a term post-payment, which is felt to limit the level of impact in the long term.

Deadweight: In terms of recruitment, it is too early to make an accurate assessment of deadweight since most recipients to date will have entered into the sector before the initiative was introduced. In terms of retention there appears to be a significant element of deadweight associated with Golden Hellos - that is, in a significant proportion of cases individuals would have stayed in (or indeed left) FE teaching regardless of the Golden Hello payment.

Process and Delivery

The intended aims and objectives of the initiative are not very transparent and lines of responsibility for delivery are somewhat unclear. In most colleges visited the Golden Hello is operated as a discrete initiative and there is no evidence of variance in approach for different shortage subject areas. Several colleges are also operating their own separate approaches to tackle recruitment and retention.

The approach to marketing has been minimal. Most recipients (51%) found out about Golden Hellos via word of mouth.

The Local LSC role is considered to be largely operational and the delivery process is viewed as straightforward. All Local LSCs have rejected some Golden Hello applications for reasons of ineligibility. Mechanisms for delivery vary and there is some scope to standardise the process.

Despite feeling generally confident, most Local LSCs are contacting LSC National Office or DfES with queries concerning eligibility. There would be merit in providing further guidance and for making eligibility criteria simpler and clearer.

Most Local LSCs are not collecting additional monitoring information other than that required by LSC National Office. Gathering data on local recruitment and retention needs was not understood to be part of the role and such data are not typically available.

All colleges have designated a member of staff to take responsibility for Golden Hellos. Whilst some are undertaking a detailed eligibility check, others are not filtering applications when uncertain on issues of eligibility and are leaving decision-making to the Local LSC.

Eligibility and Design

Several issues emerged in relation to eligibility and design of the initiative:

- the definition of shortage subject area is unclear. This is leading to confusion among deliverers and resulting in some incorrect approvals;
- the extent to which the list of shortage subject areas reflects sector need is unknown given a dearth of up-to-date data nationally and locally. Qualitative feedback suggests that shortage subjects differ by location and contextual factors and are subject to change. Independent Specialist colleges have distinct needs that are not considered to be reflected in the design of the initiative;
- there is a lack of clarity in the definition of prior 'teaching experience' and the rationale of excluding individuals with prior teaching experience has been questioned. It is felt that returnees and those 'testing the water' by undertaking some paid teaching prior to entering into the sector e.g. from higher paid industry employment could be attracted by a Golden Hello;
- there needs to be greater cohesion across other initiatives to ensure that (local) policies/programmes for teacher training and to attract Basic Skills tutors do not conflict with each other;
- some non-eligible institutions (in Adult & Community Learning and Work-Based Learning) are disappointed that the initiative does not

cover their staff;

- some colleges have highlighted recruitment and retention needs for support staff who are not eligible for a Golden Hello;
- the timing, amount and requirements for payment have been questioned. It is argued that, to act as a recruitment tool, payment could be made earlier. There is concern that the initiative does not require recipients to stay for more than a term post-payment. It is uncertain whether the amount of payment received (after tax) is sufficient to make a difference in the light of wider issues around FE pay;
- some colleges felt it might be more effective to give them more autonomy and flexibility to distribute Golden Hellos according to needs.

Conclusions

At this early stage, it is not possible to definitively and quantifiably comment on effect and impact. Nevertheless, there is evidence that the initiative is having some positive effect in terms of teacher attitudes and small positive effects on recruitment and retention. However, the findings suggest that the initiative has not addressed recruitment and retention issues in the majority of cases because of the way it has been framed and is being delivered. Under its current framework the initiative is too generic, open to interpretation and, in some cases, deemed as unfair. There is a need for the initiative to be more targeted and specific. Moreover, although the initiative was never intended to address the issue of pay, the evidence suggests that whilst this remains the central constraint for stakeholders, it will limit the extent that Golden Hellos could have an impact on recruitment and retention.

Recommendations

It is recommended that consideration is given to the following points:

- the parameters of recruitment and retention issues that Golden Hellos are intended to address should be more clearly defined and disseminated;
- strategies for marketing need to reflect the

remit of the initiative and should be more widely focused to attract those external to the sector;

- a means of collating data from colleges should be developed (e.g. survey) to identify shortage subjects areas at the national, regional and local level;
- the policy for eligibility for returnees and those with prior paid teaching experience should be reconsidered so that the initiative does not exclude those that may be attracted;
- discussions are undertaken with relevant policy holders and other stakeholders to ensure greater cohesion with other policies and strategies (e.g. for Basic Skills and to address concerns regarding recruitment and retention of support staff);
- the timing and amount of payment is reviewed and should reflect the definition of recruitment and retention issues within the policy remit;
- consideration should be given to developing a separate approach/ initiative to more effectively address the needs of Specialist colleges.

Additional Information

Copies of the full report (RR544) - priced £4.95 - are available by writing to DfES Publications, PO Box 5050, Sherwood Park, Annesley, Nottingham NG15 0DJ.

Cheques should be made payable to "DfES Priced Publications".

Copies of this Research Brief (RB544) are available free of charge from the above address (tel: 0845 60 222 60). Research Briefs and Research Reports can also be accessed at www.dfes.gov.uk/research/

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