



Department  
for Education

# The Teacher Student Loan Reimbursement Scheme

Final Evaluation Report

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Government  
Social Research

# Contents

List of figures	3
List of tables	4
Acknowledgements	5
Executive summary	6
Awareness	6
Processes	7
Impacts	7
Introduction and context	9
Recruiting and retaining teachers in England	9
The purpose of the TSLR evaluation	10
The story so far	11
Focus of the final 2022 report	19
Methodological summary	19
Teachers' views on the profession and their career	22
Staying in teaching	22
Teaching experience	25
Awareness and understanding of TSLR	29
Drivers of awareness	29
Finding out about TSLR	29
Knowledge of policy features	32
The TSLR application process	35
Making a claim	35
Satisfaction with the claims process	36
Influence of TSLR on career decision making	39
Recruitment challenges faced by headteachers	39
The general influence of financial incentives on teacher retention	42
Influence of TSLR on teachers' career decisions	42
Conclusions	58
Awareness	58
Processes	58

Recruitment	59
Retention	59
DfE's Internal statistical evaluation	61
Data and method	61
Group Comparisons	63
Results	65
Appendix A: Regression models and correlations – survey data	67
Appendix B: Models for DfE's statistical evaluation	70

## List of figures

Figure 1: Prompted awareness of TSLR by different survey audiences .....	13
Figure 2: Likelihood of remaining a teacher over different timescales .....	23
Figure 3: Length of time teachers have been employed by their current school .....	25
Figure 4: Level of agreement with statements about teaching .....	27
Figure 5: What motivates teachers to stay in the profession.....	28
Figure 6: Satisfaction with the application process .....	36
Figure 7: Satisfaction with communications and payment timing.....	37
Figure 8: Influence of TSLR on recent decision making .....	43
Figure 9: Reported influence of TSLR on future career decisions .....	44
Figure 10: Influence of different reimbursement values on remaining a teacher.....	49
Figure 11: Self-reported influence of different factors on applying for another post.....	57
Figure 12: Proportion of teachers leaving by year – eligible areas compared to ineligible areas, not taking into account subject.....	63
Figure 13: Proportion leaving teaching – eligible subjects compared to ineligible subjects, not taking into account location.....	64
Figure 14: Proportion leaving teaching – eligibility by subject and location .....	65

## List of tables

Table 1: Evaluation aims and objectives.....	11
Table 2: Prior evaluation fieldwork.....	12
Table 3: Proportion of pilot area teachers stating TSLR had at least some influence on future career decisions.....	17
Table 4: Demographic profile of survey respondents.....	20
Table 5: Professional characteristics of survey respondents .....	21
Table 6: Proportion of TSLR eligible teachers remaining in the profession .....	23
Table 7: How claimants first heard about TSLR.....	30
Table 8: Teachers' awareness of TSLR eligibility criteria.....	33
Table 9: Teachers' awareness of TSLR features and processes.....	33
Table 10: Results from the logistical regression model of leaver rates .....	66
Table 11: Linear regression – what determines whether a teacher thinks they will be teaching in 5 years' time. $R^2 = 0.273$ .....	67
Table 12: Linear regression – influenced by financial incentives to stay in teaching. $R^2 = 0.183$ .....	69

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The CFE authors of this report are John Higton, Sophie Spong and Michelle Hansel.

## Executive summary

The Teacher Student Loan Reimbursement scheme (TSLR) aims to improve teacher recruitment and retention. Eligible teachers can claim back payments made to the Student Loans Company in the previous year if they taught a target subject in a pilot area<sup>1</sup>.

The evaluation has three core purposes: to measure awareness of the scheme, to assess whether the application and claims process is effective, and to measure any self-reported impact on teacher recruitment and retention.

This report summarises findings from the last phase of the survey and interview fieldwork conducted in 2022 with teachers working in pilot areas, teachers working in non-pilot areas bordering a pilot area, and headteachers in pilot and non-pilot areas. The report also presents a review of the key findings from earlier fieldwork between 2018 and 2021 (Table 2 summarises the fieldwork conducted in the evaluation).

The Department for Education conducted an internal impact analysis of TSLR alongside the process evaluation outlined. This analysis aimed to measure whether the policy had significant impact on quantitative measures of teacher retention. The findings of this analysis are also included within this report under the heading *DfE's internal statistical evaluation*.

## Awareness

Teachers in pilot areas showed high awareness of the scheme. However, whilst nearly all TSLR claimants (96%) were understandably aware of TSLR, awareness was lower (67%) amongst the small number of eligible teachers in pilot areas who did not claim. Interviews with eligible non-claimants showed that low awareness was one reason they did not make a claim.

Teachers expressed higher awareness of the general eligibility criteria compared with the specific mechanics of the scheme. Higher awareness arose from claimants who learned more about the scheme's details through the application process. The findings indicate that increasing awareness of TSLR amongst eligible teachers in pilot areas may increase take up.

Many headteachers in this research, including those in pilot areas, reported little knowledge of TSLR apart from the general concept. A few headteachers wanted to use the scheme and other financial incentives as part of a wider recruitment package when

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<sup>1</sup> Full eligibility criteria are listed on Box 1

filling teacher vacancies. As most headteachers knew little of the scheme, they could not alert prospective teachers to benefits like TSLR as part of recruitment.

## Processes

The findings indicate that the scheme is operationally effective. There are high levels of reported satisfaction with the process of making a claim and receiving a reimbursement. Teachers found the application form straightforward, although a few thought some method of auto-filling data from source (amount of loan repaid, details of their school, teacher reference number, etc.) would further improve the process.

The main source of relative reported dissatisfaction was communication regarding the time when claimants should expect to receive payment. Several teachers discussed the lack of information on when they would receive their payment. Clearer communication may reduce the expressed perception that payment takes time and could result in claimants checking their accounts for payment less frequently.

## Impacts

The evidence shows individuals entered teaching for many reasons; financial incentives were one factor amongst many for a minority of teachers. In 2019, a small proportion of trainees (7%) said TSLR would strongly influence which subject they would teach. The evaluation consistently found altruistic motivations had a stronger influence on teacher recruitment.

This last phase of the research found that TSLR influences some teachers' career choices, but only influences the choice to stay in teaching in specific circumstances. Teachers who were interviewed said the factors that drew them into teaching in the first place were stronger influencers on remaining in the profession. These factors were interest in their subject and an altruistic motivation to make a difference in children's lives. Teacher workload was reported as the strongest factor pushing teachers away from the profession.

The scheme's influence on career choices was subtle. There was evidence that TSLR plays a part in retention for some teachers and financial incentives motivate those who worry about their student loan to remain a teacher. Incentives also exerted more influence for older teachers who find their workload manageable. Reimbursing £1,212 per annum<sup>2</sup> (which was the second highest amount presented in the survey: See Figure 10) significantly contributed to whether a teacher said they would be likely to remain in

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<sup>2</sup> The scales used in the survey to ask how much participants were reimbursed, were based on student loan repayment thresholds and incremental teacher salaries at the time the survey was designed.



teaching in five years' time. However, surveyed teachers with higher outstanding loans were less likely to think they would stay in teaching.

The statistical analysis conducted by the Department did not find strong evidence of any effect of receiving TSLR on teacher retention. There was a small difference in year-on-year leaver rates between the treated (i.e., those receiving TSLR) and the control (observably similar teachers not receiving TSLR) populations. However, the size and variability of the pilot, with additional variability caused by the Covid pandemic, meant that the analysis was not sufficient to determine whether this was due to a real effect of the pilot, or random variation.

# Introduction and context

## Recruiting and retaining teachers in England

The government's Teacher Recruitment and Retention Strategy (2019<sup>3</sup>) recognises the central role good teachers play in successful schools. The strategy recognises that recruiting and retaining teachers of the right calibre is increasingly difficult and supplements successive Government policies addressing the professional challenges teachers face. The Early Career Framework<sup>4</sup> offers a two-year induction period for newly qualified teachers to support their early professional development.

### Box 1: The Teacher Student Loan Reimbursement Scheme in summary

The scheme enables eligible teachers to claim back the amount they have paid to the Student Loans Company (SLC) in the preceding financial year for up to 11 financial years into their teaching careers. Repayments are dependent on their salary and when teachers took out a loan.

Teachers are eligible if they:

- teach in one of the 26 LA Pilot areas in a state funded secondary school.
- undertook Initial Teacher Training (ITT) and achieved qualified teacher status (QTS) between 2013/14 and 2020/21 inclusive.
- spent at least half their time teaching Languages, Biology, Chemistry, Computing or Physics.
- are still teaching when they claim.

Financial incentives also play a role in wider recruitment and retention policies, especially in subjects facing more shortages (Long and Danechi, 2021<sup>5</sup>). The Teacher Student Loan Reimbursement scheme (TSLR, or the scheme) is one such intervention which reimburses student loan repayments made by eligible teachers if they stay in teaching (see Box 1 above).

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<sup>3</sup> Department for Education (2019). Teacher Recruitment and Retention Strategy. DfE. [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/786856/DFE\\_Teacher\\_Retention\\_Strategy\\_Report.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/786856/DFE_Teacher_Retention_Strategy_Report.pdf)

<sup>4</sup> Department for Education documentation available at the ECF microsite: <https://www.gov.uk/government/collections/induction-training-and-support-for-early-career-teachers-ects>

<sup>5</sup> Long, R., and Danechi, S. (2021) Teacher Recruitment and Retention in England. House of Commons. <https://researchbriefings.files.parliament.uk/documents/CBP-7222/CBP-7222.pdf>

This report concludes an evaluation that commenced in 2018. Several internal reports were produced over the past four years. This report summarises the main findings from earlier research and presents evidence from the last round of fieldwork conducted with teachers and headteachers.

## **The purpose of the TSLR evaluation**

### **Aims and objectives**

The evaluation was designed to measure awareness and understanding of the scheme, as well as assessing any influence on the recruitment and retention of trainees and qualified teachers in the target subjects and areas.

The study covered the processes involved throughout the scheme and self-reported impacts on individual career decisions. The process elements of the evaluation considered applications for the scheme and reimbursement processes. Those who were eligible to claim for TSLR were asked about the impact of the scheme on their career decisions. Table 1 (overleaf) summarises the aims and objectives of the evaluation set at inception in 2018 and identifies the research methods used to gather evidence.

The Department for Education (DfE) conducted a quasi-experimental impact analysis the results of which are summarised in the final chapter of this report.

**Table 1: Evaluation aims and objectives**

Research question	Surveys	Interviews with school leaders	Interviews - target trainees & teachers
<b>Awareness</b>			
Awareness of the scheme	✓		✓
Understanding of the scheme/offer	✓	✓	✓
<b>Processes</b>			
Efficiency and effectiveness of the process for claiming	✓		✓
How the scheme could be improved	✓	✓	✓
How TSLR works alongside other recruitment and retention initiatives		✓	✓
<b>Impacts of TSLR on ... (self-reported)</b>			
... attitudes towards the scheme and teaching more broadly	✓	✓	✓
... trainees' decisions to pursue teaching	✓		✓
... successful completion of an initial teacher training (ITT) course and where choose to train	✓		✓
... retention in i) teaching; ii) teaching in target subjects; and iii) teaching in ineligible schools	✓	✓	✓

## The story so far

Four waves of fieldwork have been conducted since the start of the evaluation in 2018 (Table 2). Each wave collected evidence from different audiences to answer the specific research questions set out in Table 1. Measures of awareness were considered throughout, whereas questions about experiences of the scheme were only posed to TSLR claimants. Similarly, the influence of the scheme on training decisions only featured in early fieldwork with those considering teaching and trainees.

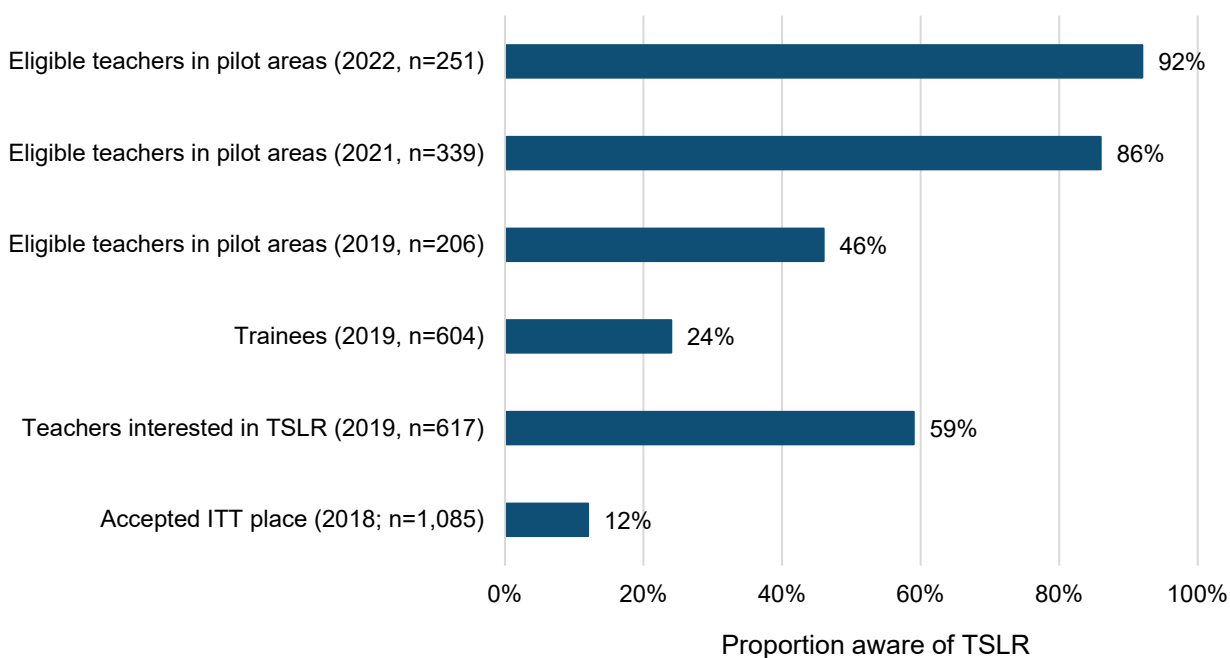
**Table 2: Prior evaluation fieldwork**

<b>Fieldwork wave</b>	<b>Timing</b>	<b>Scope</b>	<b>Methods</b>
Survey 1	June to June 2018	Awareness of the scheme amongst those considering teaching	Online survey (n=1,085) and 15 telephone interviews
Survey 2	September to November 2018	Awareness amongst teachers expressing an interest in the scheme	Online survey (n=629)
Mixed methods 1	May to June 2019	Awareness amongst those completing initial teacher training (ITT), and teachers and headteachers in pilot areas	Trainee survey (n=604) and 15 telephone interviews  Pilot area teacher survey (n=737, including 206 eligible) and 15 telephone interviews  12 interviews with headteachers
Mixed methods 2	March to July 2021	Claimants' experiences of the scheme, plus a return to issues of awareness of teachers and headteachers in pilot areas.	Pilot area teacher survey (n=836, of which 339 were eligible) and 29 telephone interviews  12 interviews with headteachers

## Awareness

Awareness of TSLR differed between all survey audiences, and over time. Figure 1 shows that levels of prompted awareness<sup>6</sup> were higher in more recent surveys. However, it is important to note that variance in the sample of respondents is likely to account for many of the differences shown in the chart. Most notably, TSLR claimants comprised most of the sample frame in the last two pilot teacher surveys.

**Figure 1: Prompted awareness of TSLR by different survey audiences**



Sources: Various evaluation surveys, with the date of survey and base in the chart.

Nevertheless, two tentative conclusions can be drawn:

- Firstly, trainees were less aware of TSLR than qualified teachers in the early stage of the evaluation, which may indicate that TSLR's effectiveness as a recruitment tool was limited at the time. In order to influence ongoing recruitment, raising awareness amongst trainees eligible for other financial incentives may be helpful.
- Secondly, awareness amongst eligible pilot area teachers *who did not claim* TSLR remained similar between 2021 and 2022 (around seven in ten). This is an increase from 2019 (before claims could be made) of approximately 25 percentage points and implies an increase in baseline awareness in pilot areas. Around three in ten eligible non-claimants in the last survey remained unaware of

<sup>6</sup> identifying TSLR from a presented list of wider financial incentives

TSLR so improving awareness amongst this group may also increase take up and improve any subsequent impact on retention.

## **Awareness of various aspects of TSLR**

Survey respondents usually knew more about TSLR's eligibility criteria than the detailed features of the scheme. Eligibility criteria sets out general information about who can apply, whereas detailed features are relevant to those making an application. We would expect higher awareness of general information as not all eligible teachers made an application and hence have no direct experience of the scheme.

A relationship between awareness, eligibility, and teaching location was also present. Throughout the evaluation, those eligible for TSLR were more aware of various aspects of the scheme than those who were ineligible. Again, this finding is not surprising, but it does suggest that communication within pilot areas to eligible teachers raised awareness for some.

The subject eligibility criterion<sup>7</sup> was the best-known element of TSLR by respondents to all surveys. In 2018, nearly half (45%) of those entering training for a TSLR eligible course who knew about the scheme recognised only teachers of certain subjects were eligible. By 2021, nearly all eligible (94%) teachers in pilot areas knew about this criterion.

However, awareness of all criteria was lower amongst eligible teachers who did not make a claim. For example, fewer than three in five (58%) eligible non-claimants knew only teachers of certain subjects were eligible in 2021. Again, this finding suggests that improvements to communication would have had value in reaching more eligible non-claimants.

## **Channels of information**

Two key channels of communication about TSLR emerge from the evidence.

- Websites managed by DfE and its agencies were cited across all waves of research as an important source of information. In 2018, two in five (39%) of those interested in teaching and eligible by subject first learned of TSLR from the Get Into Teaching website. The DfE website was a critical information source for finding out more about TSLR for eligible teachers in 2021 (83%) and 2022 (84%).
- Other teachers / colleagues were the other main source of information. At each prior survey point, around a quarter of teachers said they first learned about TSLR from other teachers.

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<sup>7</sup> Teachers should spend at least half their time teaching Languages, Biology, Chemistry, Computing or Physics

## Application Process

Views on the application process were collected in the last two fieldwork waves and processes worked smoothly for most surveyed claimants. For example, the 2022 survey found nearly all claims were successful (97%), replicating findings from 2021 (96%). A similar proportion of claimants (92%) planned to apply again.

Some tweaks to the information required to support an application were suggested in 2021, including auto-filling online form data. The main point of relative dissatisfaction reported in 2021 was how long it took to receive payment and the limited communication on progress after applying. Fewer criticisms of these aspects were found in the most recent 2022 survey.

## Working alongside other schemes

Teachers who were interviewed reported that bursaries exerted the strongest influence on recruitment into the profession throughout the evaluation. They support teachers throughout their training year and are especially important to career changers who need funds to replace the salary they lose on leaving their previous employment.

Awareness of teaching bursaries was highest amongst all listed financial incentives for all audiences throughout the evaluation: three quarters (75%) of those interested in teaching recognised teaching bursaries in 2018, as did 90% of eligible trainees in 2019. TSLR was less well known for these earlier trainees as only a quarter (24%) recognised the scheme. By comparison, half (54%) had heard of Initial Teacher Training scholarships and more than a third knew of Teaching and Learning Responsibility (TLR) payments (37%) and London weightings (36%).

## Impacts

### Attitudes towards loans

Throughout the evaluation, most survey respondents expressed neutral feelings towards student loan repayments. More than half (54%) of eligible trainees and teachers with loans surveyed in September 2019 disagreed that they worry about their student loan<sup>8</sup>: 61% of eligible pilot area teachers said the same in 2021; this report finds 54% of the 2022 pilot area teachers disagreed that they worry about their student loan.

Those who reported that they do not worry about their student loan noted that repayments only begin after crossing a salary threshold and they are deducted automatically and proportionally from their wages. During in-depth interviews, trainees and teachers commonly equated student loan repayments to tax deductions.

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<sup>8</sup> By comparison, around a third of these two audiences agreed with the statement



The exception were teachers interested in TSLR who were surveyed in April 2019. More of this group agreed (54%) than disagreed (35%) that they worried about their student loan. These respondents registered an interest in applying for TSLR and were actively thinking about their loan at the time, which may explain the observed difference.

A minority of respondents do worry about their student loan; a third (33%) agreed they were concerned in the 2022 survey. Furthermore, a statistical relationship is found between those who say they are influenced to remain in teaching by financial incentives and those who worry about their student loan. Therefore, the TSLR policy is likely to have a differential impact depending on attitudes towards loans.

### **Influence on recruitment**

Other financial incentives are available to teachers in addition to TSLR. Evidence across all this evaluation's fieldwork shows that monetary schemes which support individuals during their training year (see section on bursaries above) are perceived to exert the greatest influence on teacher recruitment. Older trainees who change careers to become a teacher rely on the support offered by bursaries or salaried teacher training routes to offset lost income, as do trainees with existing financial commitments such as mortgages.

Nonetheless, financial factors were less influential on the decision to pursue teaching compared with personal considerations. The evaluation evidence consistently finds altruism (wanting to make a "difference" to children's' lives) and teachers' love of their subject are the strongest draws into teaching. Even though financial support often enables individuals to move into teaching, a minority of respondents in the earlier evaluation surveys said TSLR exerted some influence on what and where to teach:

- In 2018, more than a quarter (28%) of those considering a teaching career said TSLR would be very influential on the subject they would teach. Around one in six said the scheme would influence intentions to teach or train in an eligible area. This survey also included a small group of people (63) who were no longer interested in teaching. The main reasons given to not pursue teaching were attractions of another career (51%), low salaries (39%), and the cost of initial teaching training (21%).
- One in eight (13%) of ITT applicants surveyed in 2019 cited financial incentives to encourage people to stay in teaching as a motivation to enter teaching. Three in five trainees in that year (60%) did not hear of TSLR until after they begun teacher training. One in 14 (7%) teacher trainees said TSLR would be very influential on the subject they chose to teach.
- One in seven (15%) teachers interested in TSLR (April 2019) said TSLR would be very influential on their teaching subject: nearly three times as many (44%) said the scheme was not at all influential on this measure. A quarter (24%) said they

would consider moving to an eligible school if they could commute but only 14% said they would move home to an eligible area with similar local characteristics.

### Influences on retention

Throughout the evaluation, the evidence shows motivations to stay in teaching mirror those that draw teachers into the profession. Results from the 2021’s pilot area survey typify findings across the whole evaluation: three quarters (74%) of eligible teachers said they were motivated to continue teaching because they love the subject they teach and seven in ten (71%) thought they would make a difference to peoples’ lives. By comparison, one in six (18%) said the financial incentives on offer to encourage people to stay in teaching were motivating.

From 2019 onwards, eligible teachers working in pilot areas expressed broadly consistent views about the stated influence of TSLR on their future decisions<sup>9</sup>. Table 3 shows around two in five respondents said TSLR exerted at least some influence<sup>10</sup> on their future career plans. These findings suggest that TSLR was part of the retention decision-making mix. Eligible teachers said non-financial factors primarily motivated them to remain in teaching, but finances do have some, lesser, influence.

**Table 3: Proportion of pilot area teachers stating TSLR had at least some influence on future career decisions**

Sample (date; base)	Remain teaching in an eligible area	Keep teaching in a state-funded school	Stay in teaching for another academic year
Eligible teachers in pilot areas (2019, n=205)	42%	44%	42%
Eligible teachers in pilot areas (2021, n=337)	46%	42%	41%
Eligible teachers in pilot areas (2022, n=238)	42%	40%	41%

Sources: Various surveys. Bases in table

<sup>9</sup> How influential was the teachers’ student loan reimbursement scheme on the following career decisions for the current academic year?

<sup>10</sup> A seven-point scale was used where 1 = not at all influential and 7 = very influential. “At least some influence” is an aggregate of all respondents scoring 5, 6 or 7.

## **Influence of the reimbursement value on staying in teaching**

It comes as no surprise that the scheme's influence on retention increases with the amount reimbursed. Four in five (80%) teachers interested in TSLR (April 2019) said an annual reimbursement figure of £1,344 would be very influential on a decision to remain in teaching<sup>11</sup>. The figure used in the survey increased from 2021 to reflect policy and economic changes, but the overall result was similar. By 2022, the proportion of pilot area teachers who said the highest stated reimbursement figure (£1,656) would influence a decision to stay in teaching was 72%. Figure 10 shows that the highest amount stated was more influential than the middle range figure used each time the question was asked<sup>12</sup>.

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<sup>11</sup> Survey respondents were asked to state how influential different reimbursement amounts were on a decision to remain in teaching. Five amounts were presented in a randomised order. In the 2021 and 2022 surveys, these values ranged from £48 a year (£4 per month) to £1,656 a year (£138 per month).

<sup>12</sup> Initially £720 per annum, increasing to £768 from 2021.

## Focus of the final 2022 report

The remainder of this report focuses on the final wave of research completed in 2022. After summarising the research method for the final round of fieldwork, this report sets the context in which TSLR operates. Throughout the evaluation, TSLR is found to influence choices rather than function as the main decision-making criteria. The first chapter outlines the key factors which influence teachers' career decision making based on fieldwork conducted between March and July 2022.

The remaining chapters follow the structure of the evaluation aims and objectives. Teachers' views on the profession are covered first to provide context for the rest of the report. Next, teachers' and headteachers' most recent awareness of the policy and its component features is presented. Following this, recent claimants' views of the application and claims process are covered. The report then explores the impact of the policy on career choices from the perspective of teachers and headteachers. The final chapter summarises the findings from the DfE impact analysis based on DfE School Workforce Census data between 2016 and 2021.

## Methodological summary

### Teachers

An online survey of teachers in schools located within pilot areas eligible for TSLR was conducted between 22<sup>nd</sup> March and 26<sup>th</sup> May 2022. After data cleaning, a total of 251 teachers responded from two sampling methods:

- a survey of TSLR claimants (208 eligible responses); and
- a survey of eligible teachers (43 eligible responses after screening) working in pilot area schools – a link was shared via a staff member at that school. These teachers were a mix of those who said they claimed (25 respondents) and those who had not (18).

This report uses “respondent” when discussing findings from survey data.

In-depth follow-up telephone interviews with 30 pilot area teachers were completed between May and July 2022. This sample comprised of 23 claimants and 7 eligible non-claimants. The descriptor “interviewee” is used when discussing findings derived from in-depth interview evidence.

An online survey of teachers working in areas adjacent but outside of pilot areas was also conducted using a link shared through schools (the method in bullet two above). Ninety-nine teachers who would be eligible for TSLR if they lived in a pilot area completed this survey.

**Table 4: Demographic profile of survey respondents**

<b>Characteristic</b>	<b>Pilot area</b>	<b>Non pilot area</b>
<b>Gender (base)</b>	<b>251</b>	<b>98</b>
Female	64%	55%
Male	34%	42%
Prefer not to say	2%	3%
<b>Ethnicity (base)</b>	<b>251</b>	<b>99</b>
White British	84%	85%
White other	5%	6%
Mixed	2%	1%
Black / Black British	1%	-
Asian / Asian British	6%	4%
Prefer not to say	2%	4%
<b>Age (base)</b>	<b>249</b>	<b>80</b>
Mean (years of age)	32.4	29.4
Median (years of age)	30	29

**Table 5: Professional characteristics of survey respondents**

<b>Characteristic</b>	<b>Pilot area</b>	<b>Non pilot area</b>
<b>Role (base)</b>	<b>251</b>	<b>99</b>
Classroom teacher	65%	73%
Leadership role	32%	20%
Other	2%	7%
Prefer not to say	2%	-
<b>Subjects (base)</b>	<b>251</b>	<b>99</b>
Biology	26%	26%
Chemistry	18%	15%
Physics	16%	20%
Computer Science	10%	11%
French	12%	7%
German	2%	2%
Spanish	11%	7%
Other languages	2%	1%
Other eligible	4%	10%

### **Headteachers in pilot areas**

In-depth interviews were also conducted with 22 headteachers in pilot (12) and non-pilot (10) areas to explore their awareness of the TSLR scheme, their views on financial incentives for teachers, and the potential influence on recruitment and retention of teachers in their school.

# Teachers' views on the profession and their career

## Staying in teaching

### Career plans over the next two years

The 2022 survey found few pilot area teachers planned to leave the profession in the next couple of years. Just 3% said they planned to leave and pursue a different career. A further one in eight (12%) were unsure about remaining a teacher; two-thirds of these teachers (19 out of 31) were actively looking at other career options.

A third of pilot area respondents (34%) aimed to stay in their current role in the current school and over a quarter (28%) sought a promotion in their current school. One in eight (12%) said they would look for a new role in a different, local school.

Non-pilot area teachers' plans for the next two academic years were very similar.

### Medium- and long-term views on remaining a teacher

Stated likelihood of remaining in teaching diminished over time. A third of respondents (34%) said they were "very likely" to still be a teacher in three years' time<sup>13</sup>. Aggregating the positive end of the scale<sup>14</sup> shows nearly two thirds (63%) of respondents said they were likely to be a teacher in three years' time.

Non-pilot area teachers express similar views: two in five (39%) said they were very likely to stay in teaching over the next three years.

Stated likelihood to remain in teaching falls as the projected number of years in the future increases (Figure 2): one in six (17%) said they were very likely to be a teacher in ten years' time. Non-pilot area teachers exhibit the same pattern with no statistical difference for the percentages presented in Figure 2.

The same trend was also found in 2021's<sup>15</sup> pilot area survey; however, more of this cohort eligible for TSLR planned to stay in teaching at each future date (See Table 6).

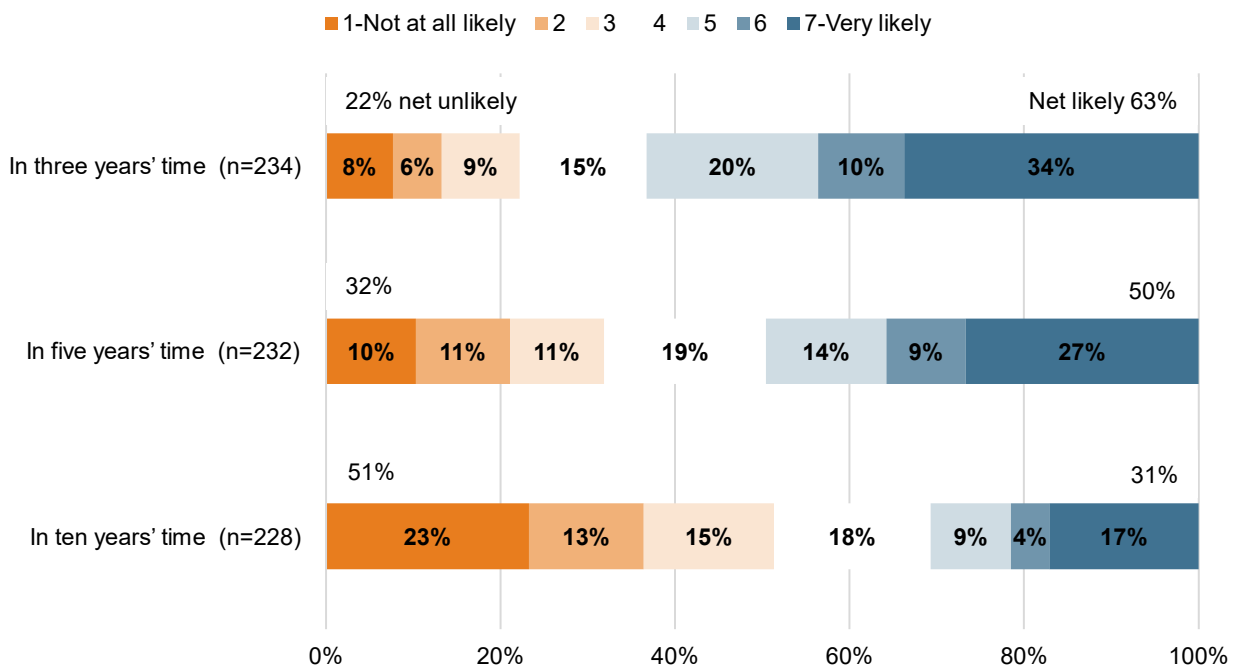
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<sup>13</sup> On a scale of 1 to 7, where 1 is 'not at all likely' and 7 is 'very likely', how likely is it that you will still be a teacher...?

<sup>14</sup> A seven-point scale was used where 1 = not at all likely and 7 = very likely. "Likely" is an aggregate of all respondents scoring 5, 6 or 7.

<sup>15</sup> Fieldwork dates between March to July 2021; n=308 to 336, See Table 6.

**Figure 2: Likelihood of remaining a teacher over different timescales**



Source: Pilot area teacher's survey. Bases in chart: All respondents excluding don't know.

Net percentages sometimes do not sum to individual percentages due to rounding.

**Table 6: Proportion of TSLR eligible teachers remaining in the profession**

Likely to be a teacher in...	Eligible teachers in 2022 (% / n)	Eligible teachers in 2021 (% / n)
Three years' time	63% / 234	82% / 336
Five years' time	50% / 232	72% / 330
Ten years' time	31% / 228	48% / 308

Source: Pilot area teacher's surveys 2022 and 2021. Bases in table: All respondents excluding don't know.



## The factors that influence plans to remain in teaching

The other factors that relate to remaining a teacher over the next five years (medium-term likelihood is used as shorthand) were modelled for the pilot area cohort<sup>16</sup>.

Regression is a useful tool for identifying other factors that relate to a topic of interest.

Appendix A shows the results of a linear regression model<sup>17</sup> exploring factors which influence the reported likelihood of remaining a teacher in five years' time. Five factors were significantly, positively correlated (i.e., each factor increased with the reported likelihood of remaining a teacher):

- Whether the respondent is a woman
- Motivated to teach because "I love the subject that I teach"
- Agreement with the statement "The workload of a teacher is manageable"
- Specifically state they "plan to stay in my current role, in my current school" rather than other career choices, and
- Influenced to remain in teaching if reimbursed £1,212 a year (£101 a month).

One other factor was also negatively correlated: medium-term likelihood of staying a teacher fell as the value<sup>18</sup> of outstanding student loans increased.

Love of the subject was therefore a strong pull factor when respondents considered their medium-term future in teaching. Respondents who said teachers' workloads<sup>19</sup> are manageable were more likely to say they will stay. Women were more likely than men to stay in teaching whereas those with a large student loan debt were more likely to say they will leave.

The unrelated variables in this model are also useful. Although reimbursing £1,212 of student loans is significant, the motivation of "the financial incentives on offer to stay in teaching in addition to my salary" does not influence the medium-term likelihood of remaining a teacher. The specific role of TSLR in career decision making is discussed in detail later in the report under the heading the "*influence of TSLR on career decision making*".

Age is also unrelated to the likelihood of remaining a teacher in five years' time. On average, eligible teachers surveyed in 2022 were 32.3 years of age which is very similar

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<sup>16</sup> Five years was chosen for the model because survey responses for this period were most evenly distributed across the 1 to 7 likelihood scale. As per Figure 2, teachers were asked about their likelihood to stay in teaching for three, five and ten years hence.

<sup>17</sup> The model accounts for 27% of the variation in the likelihood of still being a teacher in five years' time.

<sup>18</sup> Likert scale using bands of £10,000

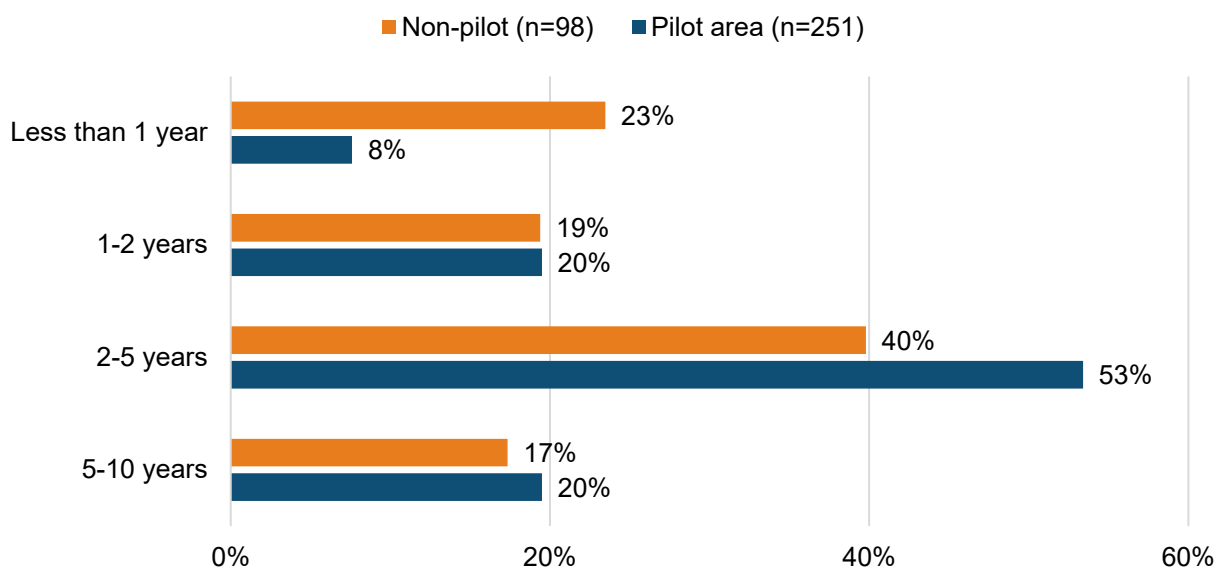
<sup>19</sup> Workload covers a range of tasks and activities to contribute towards teachers working hours. DfE resources to tackle workload are found here: <https://www.gov.uk/government/collections/reducing-school-workload>

to the average of 31.9 years in 2021. Two in five (42%) 2020/21 teacher trainees were aged 25 or younger<sup>20</sup> and four in five (81%) of all secondary school teachers in 2020/21 were aged 49 or younger<sup>21</sup>. As TSLR is open to teachers who undertook ITT and achieved QTS between 2013/14 and 2020/21 inclusive, these statistics help explain the young age profile of claimants and eligible non-claimants.

## Teaching experience

The pilot and non-pilot area samples differed by the length of time respondents were employed by their school at the time they were surveyed. A quarter (23%) of the non-pilot area sample had worked in their current school for less than a year compared with 8% of eligible pilot area teachers (Figure 3). Nearly three quarters (73%) of pilot area teachers had taught at their current school for more than 2 years compared with 57% of non-pilot area teachers.

**Figure 3: Length of time teachers have been employed by their current school**



Sources: Pilot and non-pilot area teacher's surveys. Bases in chart: All TSLR eligible respondents excluding don't know.

Overall, four in five pilot teachers (81%) had worked in their school for five years or less which is 12 percentage points higher compared with the 2021 survey (69%).

<sup>20</sup> DfE Initial Teacher Training profile data, <https://explore-education-statistics.service.gov.uk/find-statistics/initial-teacher-training-performance-profiles/2020-21>

<sup>21</sup> DfE School Workforce Statistics data, <https://explore-education-statistics.service.gov.uk/find-statistics/school-workforce-in-england>

## Comparing shorter-term career choices and views on teaching

Many factors influence teachers' views on their profession regardless of whether they teach in a pilot area. Figure 4 shows most respondents agreed that “the skills you learn as a teacher are transferable to other careers” (aggregate agree<sup>22</sup> is 61%) and “teaching offers good opportunities for relocation” (63% agreed).

Conversely, three quarters (74%) disagreed that “teaching offers a good salary compared to other careers I could follow” and four in five (82%) disagreed that “teaching offers good work / life balance” and “the workload of a teacher is manageable”.

Respondents' views on whether “teachers are offered good opportunities for continuing professional development”, “senior teachers manage classroom teachers well” and “the school in which I work effectively manages pupil behaviour” were mixed.

Non-pilot area teachers were more likely to agree their skills are transferable (77% vs. 61% for pilot areas teachers) but remained statistically similar for all other statements presented in Figure 4 (overleaf).

Views on many of these statements vary significantly by the career outlook of pilot teachers. Most views about teaching shown in Figure 4 significantly correlate to the stated likelihood of being a teacher in three-, five- and ten-years' time. The statements “The workload of a teacher is manageable”, “Teaching offers good work-life balance” and “Teaching offers a good salary compared to other careers I could follow” have the strongest relationship with the likelihood of remaining a teacher.

## Why teachers teach

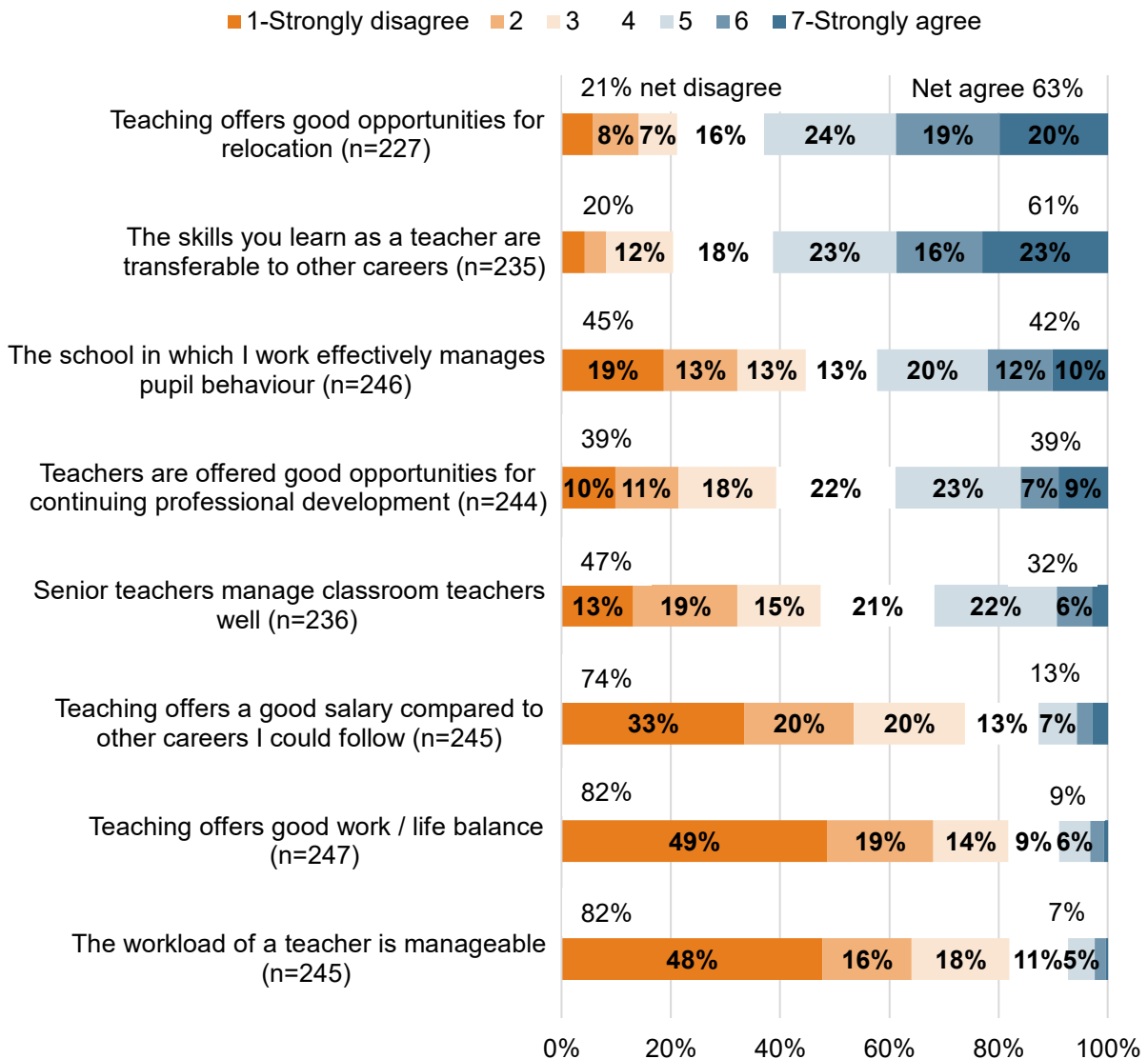
Teachers' motivations for pursuing a career in teaching were explored during the in-depth interviews. In line with findings from interviews conducted in earlier stages of the evaluation, claimants and non-claimants interviewed in 2022 said they became teachers because they wanted ‘to make a difference’.

These motivations did not change as their career progressed. The survey findings show love of the subject taught, making “a difference to peoples' lives”, “job security” and “the number of holidays” were also the strongest motivators to remain a teacher (Figure 5). The level of motivation and ranking of these factors is statistically the same for non-pilot area teachers.

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<sup>22</sup> A seven-point scale was used where 1 = strongly disagree and 7 = strongly agree. “Agree” is an aggregate of all respondents scoring 5, 6 or 7; “disagree” aggregates all scoring 1, 2 or 3.

**Figure 4: Level of agreement with statements about teaching**

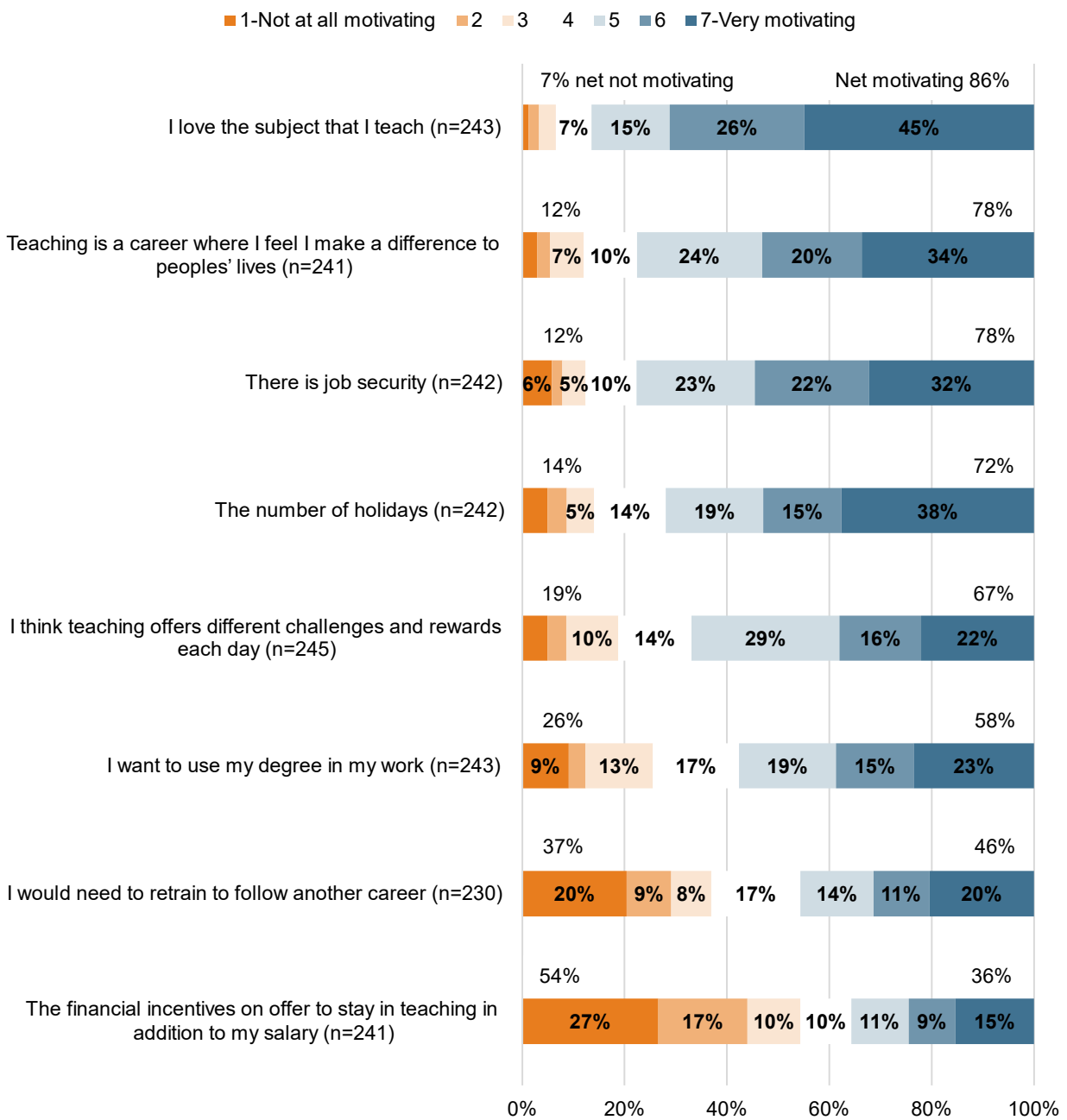


Source: Pilot area teacher’s survey. Bases in chart: All respondents excluding don’t know. Net percentages sometimes do not sum to individual percentages due to rounding.

The focus of this report is TSLR as a financial incentive. Figure 5 shows the mixed effect of financial incentives on offer to stay in teaching as a motivation to remain in the profession. This variable is discussed later in the report when considering the attributes of teachers more strongly influenced by financial incentives (see “the general influence of financial incentives on teacher retention”).

Interviewees primary motivators to remain in teaching were their enjoyment of the job and the impact they had on learners. These were key themes for interviewees who reported that teaching was a vocation and that the best aspects of their role were interacting with students in the classroom and inspiring future generations. These motivators helped interviewees manage the pressures of workload and accountability for children’s futures that are associated with the profession.

**Figure 5: What motivates teachers to stay in the profession<sup>23</sup>**



Source: Pilot area teacher’s survey. Bases in chart: All eligible respondents excluding don’t know.  
 Net percentages sometimes do not sum to individual percentages due to rounding.

<sup>23</sup> To what extent do the following factors, related to teaching, currently motivate you to continue your career in teaching?

# Awareness and understanding of TSLR

## Drivers of awareness

### Pilot area teachers

More than 9 in 10 pilot survey respondents (92%) had heard of Teacher Student Loan Reimbursements: nearly all (96%) respondents sampled from the claimant database were aware. Almost eight in 10 respondents (77%) sampled via their school knew of TSLR.

Of the other financial incentives listed, respondents were most aware of Teaching and Learning Responsibility payments (84%) and London weightings<sup>24</sup> (47% inner/outer London, and 45% London fringe). 15% of respondents said they had heard of Early Career Payments.

### Non-pilot area teachers

A separate survey of teachers working outside pilot areas resulted in 115 responses. All “non-pilot area teachers” teach in state schools located within local authorities adjacent to pilot areas. If they worked in a pilot area, all would be eligible for TSLR by subject taught and completion date of their initial teacher training. However, only ninety-nine respondents (86%) had an outstanding student loan. Most comparative analysis in the report uses the 99 non-pilot area teachers eligible by subject, ITT completion and holding an outstanding loan.

Far fewer non-pilot area teachers (40%) knew of the scheme compared with those teaching in pilot areas. Awareness of other financial incentives amongst pilot and non-pilot area teachers was similar: nine in ten (92%) non-pilot area teachers knew of Teaching and Learning Responsibility payments and half were aware of London weightings (54% inner / outer London; 51% London fringe).

## Finding out about TSLR

All survey respondents were asked how they first heard about TSLR. Other teachers were found to be an important initial source of information for pilot area teachers. Table 7 shows over a quarter (28%) first learn about the scheme through verbal or written communication with other teachers. Conversely, non-pilot area teachers were twice as likely as those working in pilot areas to first hear about the scheme from a DfE email.

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<sup>24</sup> Details of other additional payments for teaching are available here: Additional payments for teaching: eligibility and payment details - GOV.UK ([www.gov.uk](http://www.gov.uk))

**Table 7: How claimants first heard about TSLR**

<b>Information source</b>	<b>Pilot area teachers (n=231)</b>	<b>Non-pilot area teachers (n=40*)</b>
Through other teachers – in person / text / email	28%	20%
In an email from the Department for Education	20%	38%
Via my employer (the school)	16%	8%

Sources: Pilot and non-pilot area teacher's surveys. Bases in table. Non-pilot base (\*) is low

Once aware of TSLR, the main source for further information was the DfE website. Eighty-four percent of pilot area teachers and 78% of non-pilot area teachers selected this option. After the DfE website, the information source used most by those working in pilot areas was other teachers (7%). Very few non-pilot area teachers used other sources and one in seven (13%) did not look for any other information. The extensive use of the website to find out more information underlines the importance of placing accessible and correct information there.

Linked to the survey findings, interviewees said they found out about TSLR in several ways. Conversation with peers and colleagues was useful because it showed that someone else has claimed and benefited from the scheme; however, these interviewees often reported checking the scheme was real by looking for facts on the DfE website. The website also provides links to apply, which prompted them to act straight away.

Other ways that interviewees first heard about TSLR included emails from DfE or their headteachers, and external communications such as newspaper articles or teacher-led social media like language teachers' forums. Interviewees' preference for finding out about the scheme was through formal written communication, which they deemed gave it credibility, particularly when this was sent by their school leadership. Several interviewees who had first heard about the scheme from another teacher wondered why it was not more widely publicised by DfE.

I just think, it just shouldn't be a sort of secret, should it? It should be quite clear, if you work in a state school and you're teaching certain subjects then you can apply for it. It should [be] known to people, and I don't know where that would come from, whether the state would send it to all state schools. I presumed, because I knew, that it was a known thing, I was astonished (that colleagues were not aware). –

*Teacher, Claimant, German*

These interviewees suggested that DfE should promote the scheme as widely as possible to raise its visibility, instil confidence in the scheme and give those who are eligible maximum opportunity to apply. Ideas for promotion put forward by interviewees included advertising TSLR in DfE bulletins and emails, conferences, professional publications, unions, teacher training providers, exam boards, in job advertisements and social media.

## **Headteachers' awareness and promotion of TSLR**

Although most pilot area headteachers heard about TSLR, the majority said they did not know specific details such as who was eligible and how it worked. Unsurprisingly, most headteachers in non-pilot areas were even less aware of the scheme and its mechanics.

Most headteachers said they would prefer to receive information about TSLR from DfE, but admit they skim communications from the Department because of the volume of emails they receive. Some of these headteachers reported that demonstrating how the scheme might help the school address issues like recruitment and retention may help messaging stand out.

The lack of detailed knowledge of the scheme helps explain why most headteacher interviewees did not promote TSLR as an incentive to teachers. After hearing more about the scheme during the in-depth interviews, a small number of headteachers in pilot areas said they would consider promoting TSLR to eligible staff and job candidates. These headteachers said incentives that uplift teachers' salaries could help with recruitment.

I think it's the sort of thing which if I were writing an advert to recruit a teacher in Spanish, I would say that, you know, for teachers in the first eleven years of teaching, they are eligible for the student loan reimbursement scheme if you choose to come and work at this school. So yes, I think it can be used as a mechanism to actively recruit. – *Headteacher, Pilot Area*

However, headteachers often said they promote targeted financial incentives discretely because most thought that such incentives can be divisive within the school. They explained that teachers who are not eligible for these incentives work just as hard as



those who are eligible, which can cause issues amongst staff. Multi-academy trusts (MATs) often benefitted from human resources departments that manage communications about teacher benefits, which ensures that only eligible staff are alerted to the incentive.

On balance, interviewed headteachers did not see TSLR as a primary recruitment or retention tool. Headteachers felt factors such as workload, pupil behaviour, commuting time (and associated costs), and alternative labour market opportunities have a bigger impact on teachers' career decisions. Headteachers said teachers' salaries are becoming less competitive than other sectors, but that incentives such as TSLR could have some benefit in keeping teachers in their school or the local authority area.

## Knowledge of policy features

### Pilot area teachers

Pilot area teachers who knew about the scheme could mostly identify eligibility criteria. More than four in five knew that “the scheme applies to teachers of certain subjects” (86%) and “teachers must work in a state-funded school in a named area” (81%). Fewer (66%) knew that “teachers achieving qualified teaching status (QTS) between 2013/14 and 2021/21” were eligible (Table 8 overleaf; middle column).

Similarly, most pilot area teachers aware of the scheme (who are predominantly claimants) could describe how it worked (Table 9). Four in five knew they needed to make their loan repayments and this money was paid back (81%) and that the teacher (rather than the school) makes the application (79%).

However, fewer than half knew the scheme covered “all student loan repayments in addition to loans taken during teacher training” (45%). A similar proportion (42%) knew “teachers could make an annual claim for up to 10 years after completing initial teacher training”. The least understood feature of the scheme was “teachers do not pay tax on their reimbursements” (28%).

As per the survey findings, interviewed pilot area teachers knew more about some of the eligibility criteria than others and some of the aspects of the claim process. For example, interviewees reported lower levels of awareness of the loan repayment thresholds, the teaching timetable requirements and the timing of the claims window. Knowledge of the eligibility criteria and the claims process influenced whether claims were made (see the “challenges with claiming and improving the process” section below).

**Table 8: Teachers' awareness of TSLR eligibility criteria**

<b>Criteria</b>	<b>Pilot area teachers (n=231)</b>	<b>Non-pilot area teachers (n=40*)</b>
Only teachers of certain subjects are eligible	86%	70%
You have to be teaching in a state-funded school in a named area to be eligible	81%	78%
You have to have achieved QTS between 2013/14 and 2020/21 to be eligible	66%	55%

Sources: Pilot and non-pilot area teacher's surveys. Bases in table. Non-pilot base (\*) is low

**Table 9: Teachers' awareness of TSLR features and processes**

<b>Criteria</b>	<b>Pilot area teachers (n=231)</b>	<b>Non-pilot area teachers (n=40*)</b>
You still have to pay your student loan repayments; the money is paid back to you	81%	18%
You have to apply for the scheme yourself	79%	50%
You are not automatically enrolled on the scheme and need to apply each year	76%	30%
It covers all student loan repayments; not just loans you may have for teacher training	45%	10%
You can make an annual claim for reimbursement for up to 10 years following completion of your ITT	42%	15%
Teachers will not pay tax on the reimbursements	28%	10%

Sources: Pilot and non-pilot area teacher's surveys. Bases in table. Non-pilot base (\*) is low

The research also identified confusion from a small number of interviewees regarding the number of years teachers can claim the TSLR. A couple of interviewees thought claims could be made up to eleven years into their teaching career, whilst a few others believed

a total of eleven years of claims can be made after the first application<sup>25</sup>. Another interviewee was aware that TSLR is a pilot scheme, and so reported being unsure as to whether it will continue. These findings indicate that a further review of communications and website material may be helpful to improve the information for potential applicants and for teachers who have been claiming for several years.

### **Non-pilot area teachers**

Teachers outside of pilot areas cannot make a TSLR claim. This is likely to explain their much lower awareness of how the scheme works (Table 9; final column) compared with pilot area teachers, most of whom claimed TSLR. Awareness of eligibility criteria amongst non-pilot area teachers was high (Table 8): seven in ten (70%) knew “the scheme applies to teachers of certain subjects” and nearly four in five (78%) knew “teachers must work in a state-funded school in a named area”.

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<sup>25</sup> The scheme enables eligible teachers to claim back the amount they have paid to Student Loans Company (SLC) in the preceding financial year for up to 11 financial years into their teaching careers.

# The TSLR application process

## Making a claim

Only pilot area teachers were asked about their views on the application process. Eighty-six percent submitted a claim, nearly all of which (97%) completed a successful application. Nearly all (95%) also received their payment by the time they completed their survey.

The process of making a claim was easy<sup>26</sup> for most, especially “understanding the claim questions” (easy for 87%) and “submitting the claim” (87% said this was easy). The only relative difficulty for claimants was “finding the information required for submission” although three quarters (74%) still said this aspect of the claims process was easy.

Interviewees who had made TSLR claims supported the findings from the survey and found the application process straightforward. Reading about the scheme, collating the required information, and filling in and submitting the online form were nearly always described as ‘easy,’ ‘simple,’ ‘straightforward’ and ‘self-explanatory.’ They explained that the trickiest aspects of the application process related to collating the required information. The harder actions they mentioned were remembering login details for their school’s electronic pay systems, contacting the Student Loans Company (SLC) to find student loan repayments for the previous year or looking up teacher reference numbers. Finding details like the Teacher Reference Number (TRN) and claim values were sometimes described as time consuming, which complicated the claims process. These interviewees described how they would like to see more automation of this process, as they felt much of this information could be collated centrally.

For me it was a bit of a struggle because I didn't have the P60, so I had to do my calculations from every pay slip... But then I did the calculations wrong... They [DfE] told me, 'Are you sure? Is that the money that we need to pay you?' Then I checked because now I had my P60 and then I told the government the exact amount and they were like, 'Yes, that's correct.' So, that's one thing that I thought, 'Well, if you knew how much you had to pay me, why are you asking?' – *Teacher, claimant, Spanish*

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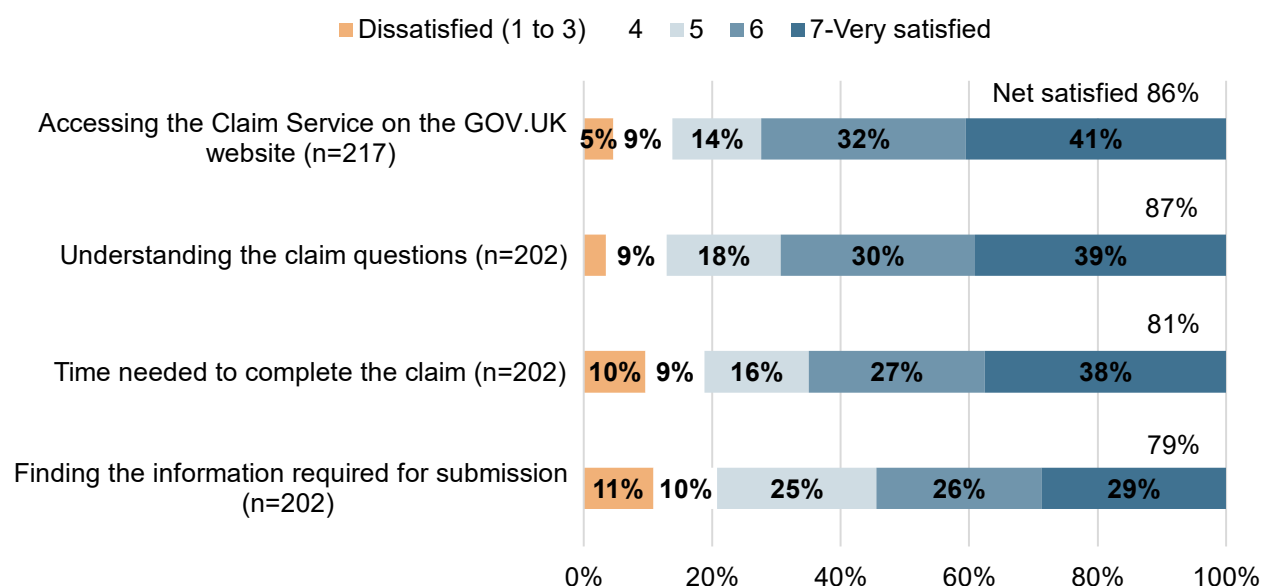
<sup>26</sup> Claimants were asked “How easy did you find the following elements of the claim process?” A seven-point scale was used where 1 = very difficult and 7 = very easy. “Easy” is an aggregate of all respondents scoring 5, 6 or 7.

## Satisfaction with the claims process

Overall satisfaction with the student loan reimbursement claim process was high: 85% were satisfied<sup>27</sup> and nearly two in five claimants (38%) gave the highest satisfaction score on the scale provided.

Satisfaction with each of the four individual elements of the claims process assessed was similar (Figure 6). The only significant difference lay in the proportion who were “very satisfied<sup>28</sup>” with finding the information required for submission. This was 10 percentage points lower (29%) compared with those very satisfied with “understanding the claim questions” (39%) and ties in with the discussion above about the challenges some faced finding the right information during their claim.

**Figure 6: Satisfaction with the application process**



Source: Pilot area teacher’s survey. Bases in chart: All applicants excluding don’t know.

Net percentages sometimes do not sum to individual percentages due to rounding.

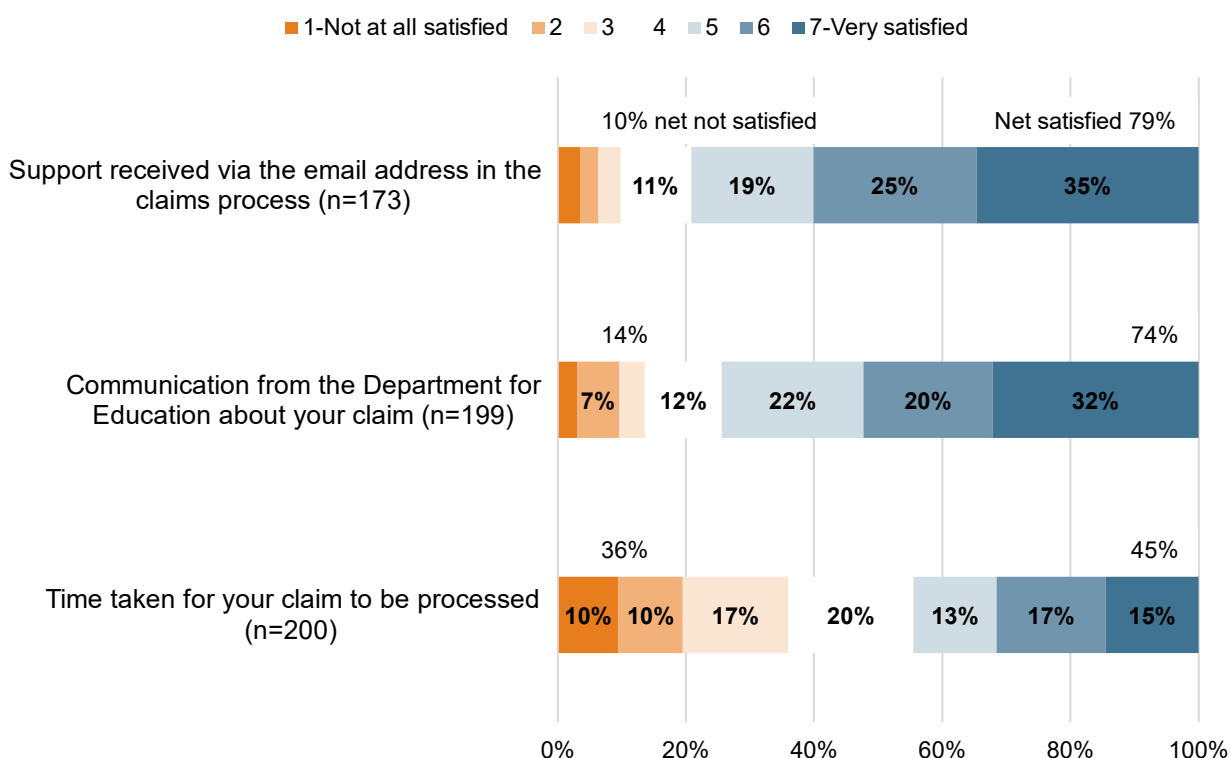
Claimants were also typically satisfied with post-application support and aspects of payment (Figure 7 overleaf)<sup>29</sup>. Satisfaction with the time taken to process the claim was mixed which was the main criticism of the process. Nearly all respondents with an outstanding loan (92%) said they will apply for TSLR next year.

27 A seven-point scale was used where 1 = very dissatisfied and 7 = very satisfied. “Satisfied” is an aggregate of all respondents scoring 5, 6 or 7.

28 Scoring 7 on the 1 to 7 satisfaction scale.

29 Lower bases because of a relatively high number of “not applicable” responses.

**Figure 7: Satisfaction with communications and payment timing**



Source: Pilot area teacher’s survey. Bases in chart: All applicants excluding don’t know.  
 Net percentages sometimes do not sum to individual percentages due to rounding.

## Challenges with claiming and improving the process

Interviewees expressed overall satisfaction with the claims process. Several non-claimants missed the claim deadline either because they only heard of TSLR after the claims window was closed, or because they forgot about until the deadline had passed: they suggested that communications about the scheme should be clearer. Whilst other non-claimants did not claim because they were unsure about their eligibility, a couple made queries about whether maternity leave or their nationality affected their eligibility which were unresolved by the time of interview. These comments relate to the earlier findings on awareness and highlight the reliance on information for the scheme from other teachers rather than official sources.

Some interviewed claimants stated that whilst their notification email provided a window within which the payment would be paid, it omitted the expected date of payment. This led them to repeatedly check bank balances over several weeks. These claimants recommended including the scheduled payment date in the notification email or communicating when the payment had been made. Several others reported a desire to have their payment closer to the submission of their application to the scheme, for example weeks later rather than months.

A small number of claimants requested a dedicated telephone number for queries<sup>30</sup>. Two interviewees abandoned their claims because they could not get through to the team processing the claims at DfE on the telephone.

I put the details in and then I sent the paperwork they needed. Then they asked me to send the statement... from the Student Loans Company, so, I sent that.... Then they were like, 'Oh, we need this and stuff.' I was a new teacher trying to learn everything and to be honest, I pushed it aside because we just went round in circles. I just spent an hour on hold on the dot-gov [main DfE switchboard] and then after the third time, it drops the call after a certain period of time... I would like to try again ... I don't know how much my time and effort is worth. – *Teacher, Non-Claimant, Chemistry*

Teachers also discussed the possibility of automating claims based on their view that DfE should already know who is eligible and have their employer, salary and student loan information to hand.

I don't know if it should have to be promoted. I think it should be automatic. I think it would be much easier surely. Less admin, less applications. Just a simple if you tick a box because someone somewhere knows when people qualified. – *Teacher, Claimant, Physics*

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30 The Claim service has a dedicated email helpdesk solely for Claim related queries.

# Influence of TSLR on career decision making

## Recruitment challenges faced by headteachers

The influence of TSLR on recruitment was covered in earlier phases of the evaluation and summarised in this report under “the influence on recruitment”. This section concentrates on the views on recruitment challenges from the latest wave of interviews with headteachers.

Most interviewed headteachers reported persistent recruitment challenges. Many noted on-going, year-round vacancies for most subjects both eligible and ineligible for TSLR, especially the core subjects of English, Maths and Science. Some said it was especially hard to recruit teachers for TSLR-eligible subjects, for example Chemistry and Physics teachers at Key Stage 5. They also had other hard-to-fill vacancies in Modern Foreign Languages and Computing.

## Supply-side recruitment issues

Headteachers described the following issues relating to recruitment. On the supply side, headteachers commonly reported there were fewer applicants applying for roles and/or attending scheduled interviews compared with previous years. This view was particularly true for those headteachers in more rural areas with poor transport links which made their school less accessible for teachers without access to their own transport. Schools with behaviour management issues were also finding it harder to recruit teachers.

Headteacher interviewees commonly thought that fewer trainees and a strong labour market for science, technology, engineering and maths (STEM) skills were the key causes for teacher shortages. In some instances, headteachers reported that they could not compete with the salaries scientifically trained teachers can command in other sectors, especially in highly competitive labour markets like London and the M4 corridor (Reading through to Bristol).

## Teachers’ skills, abilities, and professional expectations

Some headteacher interviewees felt the skills and quality of teachers they interview is falling<sup>31</sup>. A few believed teacher training courses attracted the wrong type of person into teaching. They said such new teachers had the subject knowledge but lacked the personal attributes needed to be an effective teacher. DfE did relax some ITT

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31 DfE has recently implemented a number of policies to improve the quality and skills of newly qualified teachers including the Early Career Framework and recommendations from the market review of initial teacher training.



requirements as a response to Covid which have now been rescinded<sup>32</sup>. Most headteacher's said teachers' passion for the role was a key motivator for entering, and remaining in, the profession.

My experience with interviewing people who want to come into the profession is that they want to make a difference to children; that sounds cheesy and trite, but it's true, and that's the motivation. – *Headteacher, Pilot Area*

Teaching is 50% active. You need a personality, you need something to give back to the students. You need to enthuse them. And some of these people haven't got that. – *Headteacher, Non-Pilot Area*

Several headteachers also described elevated levels of competition between schools for a smaller pool of teachers resulting in behaviours rarely seen by these heads before. One headteacher reported that they would offer a good candidate a role immediately for fear of losing them elsewhere. Another noted that some teachers are savvy to teacher shortages and use demand for teachers to improve the pay and conditions offered to either stay in their current role or move.

[Applicants use] the potential of movement as a bargaining chip in their own schools. So, they're letting headteachers know they're out on an interview on such and such a date, and that then leads to a counteroffer, which is enough for them to stay. – *Headteacher, Non-Pilot Area*

These challenges were also reported by headteachers interviewed in localities that have historically experienced fewer recruitment and retention issues. Headteachers in schools with outstanding Ofsted ratings, good pupil behaviour, affordable local housing and proximity to universities providing teacher training also reported challenges recruiting teachers.

We're a good school in a city where the majority of the schools are much more challenging places to work. So, you know, we're not the canary in the coal mine, there are other people [schools] who've been seeing it long before us. But actually, when a school like us starts to say recruitment is getting difficult, then it really is getting hard. – *Headteacher, Non-Pilot Area*

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32 Withdrawn - Coronavirus (COVID-19): initial teacher training (ITT)  
<https://www.gov.uk/government/publications/coronavirus-covid-19-initial-teacher-training-itt/coronavirus-covid-19-initial-teacher-training-itt>

## Addressing recruitment challenges

Headteachers interviewed as part of this study used various strategies to address recruitment challenges. Examples that focussed purely on teacher recruitment included securing supply through forging stronger links with training providers (including School Centred Initial Teacher Training (SCITT) providers), using recruitment agencies and specialists to arrange work visas for overseas candidates, and extending recruitment for September starts to February (in addition to the traditional Easter advert). Headteachers said they established working partnerships with local universities and teacher training providers so they can be more actively involved with the teacher pipeline. Heads in a few larger schools offered placements to trainee teachers with the intention of identifying strong trainees that they could subsequently recruit.

We do that because we obviously get to train them and learn from their experience around current methodologies. We also get to talent spot in terms of recruiting every year. – *Headteacher, Pilot Area*

One headteacher worked in collaboration with other schools. If they interviewed several strong candidates, they would ask those they did not recruit if they could pass their details to the other schools.

So, what we'll do is, if we get a field, we'll appoint, obviously, the top candidate, and then, if the other two candidates are really strong, I will ask them if they're okay with me emailing colleague headteachers. They can make their choice whether they want to work there or not, and they may have applied, but at least I'm promoting other schools. So, there's got to be a sense of collaboration. – *Headteacher, Non-Pilot Area*

Other headteachers used pay alongside terms and conditions to aid teacher recruitment. These methods are discussed in more detail later in this report, as they also relate to teacher retention, and include wellbeing packages and offers of professional development and progression opportunities to candidates.

Another headteacher offered short-term contracts when they were concerned about the quality of candidates as a way of mitigating the risk of employing someone they were unsure about.

The headteachers interviewed did not often report using financial incentives like TSLR for the purpose of recruitment, partly because TSLR is not in the school's power to give (teachers, not schools, apply). However, as outlined earlier, few headteachers who were interviewed in pilot areas knew much detail about TSLR and therefore had not used it as a tool to promote vacancies to potential applicants. Thus, there is merit in advertising the

policy to headteachers in pilot areas so that it could be used as a tool to aid teacher recruitment.

## **The general influence of financial incentives on teacher retention**

“The financial incentives on offer to stay in teaching in addition to salary” was the least motivational option for continuing a teaching career of all those presented to eligible pilot area teachers. However, Figure 5 shows responses to this option were varied, making this item a good option for regression analysis.

Appendix A shows the results of a linear regression model<sup>33</sup> exploring factors which influence views on financial incentives to stay in teaching. The model finds three statistically significant, positively correlated factors:

- Agreement with the statement “The workload of a teacher is manageable”
- Agreement with the statement “I worry about my student loan” and
- The age of the respondent when the survey closed.

These findings indicate that financial incentives exert more influence on older respondents who are more concerned with their student loan and can manage their teaching workload.

## **Influence of TSLR on teachers’ career decisions**

### **TSLR’s overall influence on retention, deciding where to teach, and subject choice**

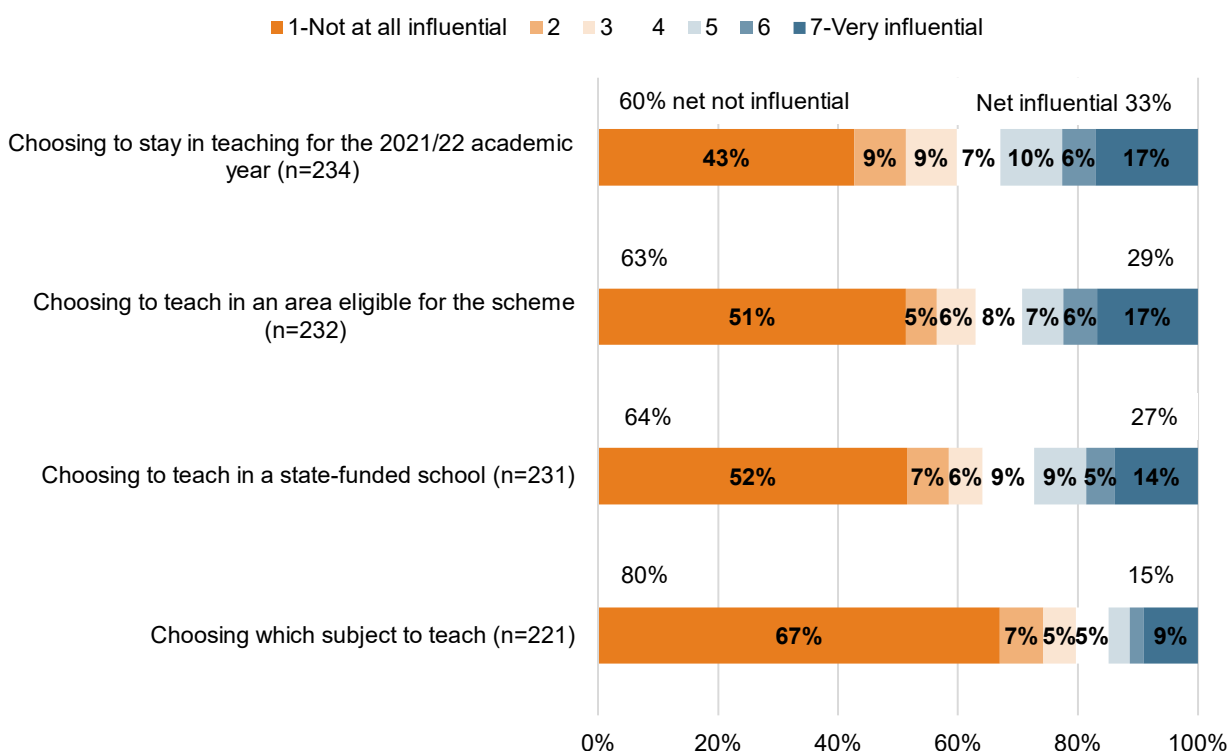
All eligible pilot area survey respondents were asked how the scheme influenced decisions they made at the start of 2020/21 (Figure 8). TSLR exerted influence on some respondents: the strongest influence was on retention where a third (33%) said TSLR influenced<sup>34</sup> their decision to “stay in teaching for the 2021/22 academic year”. A similar proportion (29%) said TSLR influenced their choice to “teach in an area eligible for the scheme”. TSLR rarely influenced the choice of subject taught.

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33 The model accounts for 17% of the variation in “The financial incentives on offer to stay in teaching in addition to my salary.”

34 A seven-point scale was used where 1 = not at all influential and 7 = very influential. “Influenced” is an aggregate of all respondents scoring 5, 6 or 7.

**Figure 8: Influence of TSLR on recent decision making<sup>35</sup>**



Source: Pilot area teacher’s survey. Bases in chart: Eligible with outstanding loans excluding don’t know. Net percentages sometimes do not sum to individual percentages due to rounding.

## TSLRs influence on future behaviours

Pilot area TSLR eligible respondents with an outstanding student loan reported a stronger influence from TSLR on future decisions compared with recent decisions. Figure 9 shows approximately four in ten said TSLR would influence their choice<sup>36</sup> to:

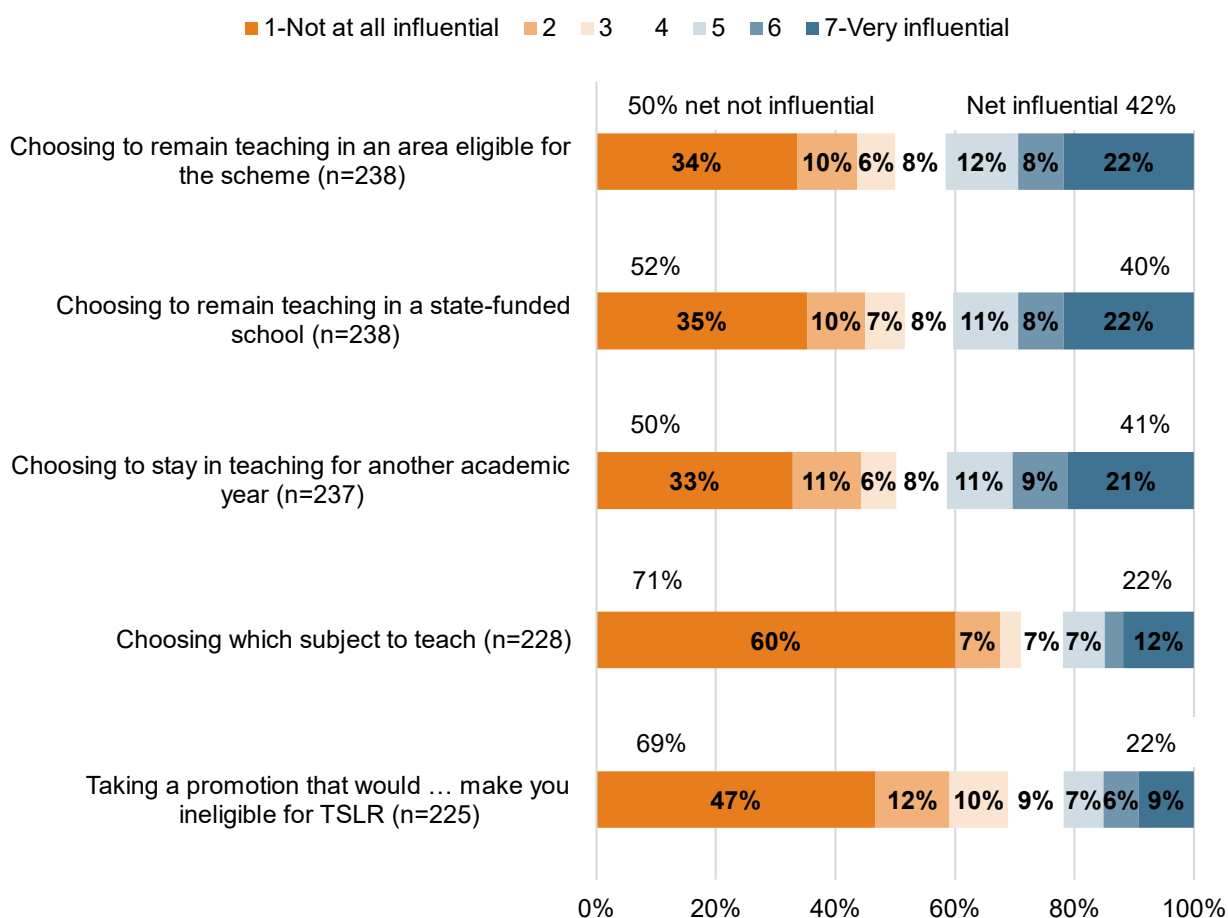
- “remain teaching in an area eligible for the scheme” (42%)
- “stay in teaching for another academic year” (41%); and
- “remain teaching in a state-funded school” (40%)

Around 1 in 5 said TSLR was very influential in these future decisions and responses were correlated which means a respondent gives similar ratings to each measure.

<sup>35</sup> How influential was the teachers' student loan reimbursement scheme on the following career decisions for the current academic year (2021/22)?

<sup>36</sup> How influential is the teachers' student loan reimbursement scheme likely to be on the following future decisions? This again uses a seven-point scale where 1 = not at all influential and 7 = very influential. “Influenced” is an aggregate of all respondents scoring 5, 6 or 7.

**Figure 9: Reported influence of TSLR on future career decisions**



Source: Pilot area teacher’s survey. Bases in chart: Eligible with outstanding loans excluding don’t know.  
 Net percentages sometimes do not sum to individual percentages due to rounding.

## How views on student loans and debt affect decision-making

Figure 9 shows the proportion of respondents reporting the scheme was very influential on different decisions ranged from 9% to 22%. Perceptions of student loans and debt are complex. Interviewees commonly thought of their loan as a type of tax and treated it differently to other debt or financial credit. It was this group of interviewees who view TSLR as a “nice-to-have” because they would not otherwise worry about a student loan repayment that is deducted directly from their salary. Income was not “lost” for this group of interviewees because they felt they had never received the money in the first place. This group thought of their TSLR reimbursement as a discretionary bonus which was typically conceptualised with phrases like ‘rewarding effort,’ ‘helping with the cost of living in an expensive area,’ or ‘boosting holiday, Christmas or home renovation funds.’ Although these claimants reported a weak impact on retention, it is not known how they would react in the absence of the incentive, or if the scheme closed.

Later in this report, we note that teachers concerned with the concept of debt (including a student loan) place a higher value on their TSLR reimbursement. Interviewees who worried about their loan typically thought that they would never pay it back and/or had significant outstanding loans (£30,000 or more). These interviewees were also more likely to report keeping track of their loan and therefore know how much was outstanding. This group managed their finances in more detail and as a result appreciated the impact that the TSLR had on their overall financial position and wellbeing regarding their views of the loan.

It's scary [the student loan amount] I'm kind of in the mindset of well, I'm never going to pay that back, even after 30 years, that's definitely not going to be paid back, so it's nice to have the government helping and saying, "Yes, we'll give you the money to do it," because I definitely wouldn't have been able to do it myself. – *Teacher, claimant, computer science*

Interviewees who earned more made higher monthly student loan repayments and were therefore reimbursed more through TSLR than those on lower salaries. Figure 10 shows that an annual reimbursement of £1,656 exerted significantly more influence on teacher retention amongst survey respondents compared with £1,212. Interviewees typically agreed that higher TSLR amounts were more influential for them to remain in a school in a pilot area.

## **Teachers' views on TSLR and why it might encourage them to stay in teaching**

Teachers reflected numerous reasons about how TSLR might encourage them to remain in the profession. This included them perceiving it as a token of appreciation for their hard work and making them feel more valued. One interviewee thought that TSLR was an effective way to reward teachers in state schools, as a way of recognising the work they do, and reported that teachers in independent schools are often paid more. However, a few teachers think the amount they receive is not enough to prevent people leaving if they have already decided to do so. The influence on the value of a reimbursement is discussed later in the report.

One interviewee also thought that TSLR might have encouraged teachers to remain in pilot area schools and specifically mentioned wanting to teach in deprived areas because they felt strongly about helping those children. Having an added incentive for them to continue doing this was seen as beneficial by this teacher.

I'm really passionate about the fact that schools need really, really good teachers and the children in the most socially deprived areas need the best teachers. So, I do think incentives and whatever the

DfE can do to support [retaining] people in that school is a great idea.  
– *Teacher, Claimant, Spanish*

Another emerging trend was that TSLR alleviated teachers' concerns – to some degree – about student debt, which is discussed in more detail later in this report.

### **TSLR does not prevent teachers taking promotions, moving between schools or leaving the sector**

During interviews undertaken in 2021, in some limited instances, interviewees reported they were hesitant to seek promotions which would reduce their teaching timetable and render them ineligible for TSLR. These teachers said they weighed up the additional pay associated with the promotion against the additional work they would need to undertake and the loss of their TSLR payment, and concluded they were probably better off staying in their current roles.

Encouragingly, most interviewees in the 2022 fieldwork did not share this view nor think TSLR would prevent career progression. Some were keen to pay off their student loans quickly; taking on extra responsibilities for a higher salary was a means to this end. Most interviewees looking at promotional opportunities felt they would still be eligible for TSLR because they would continue teaching the eligible subject for more than half their timetable.

Others seeking a promotion were prepared to forfeit the reimbursement, even if it meant a temporary drop in income, because the trajectory of long-term earnings in a senior role was likely to off-set the money they would no longer be entitled to through TSLR.

I think to be honest my next promotion will be an assistant headteacher ... I want the promotion if you see what I mean and the experience and I want to be in leadership more than I want £2,000 extra retention bonus. – *Teacher, Claimant, Spanish*

There were some limited instances of interviewees inaccurately thinking that they would not be able to claim if they had leadership responsibilities. This suggests that such misunderstanding could lead to some teachers not making a claim.

I've just actually accepted a new post as head of department, so I'm not sure now that I would [claim] next year because [that] would have technically been my fifth year of claiming... so I don't actually know if I would be eligible. – *Teacher, Claimant, Computer Science*

Occasionally, interviewees highlighted that moving to a school outside a pilot area did not necessarily result in a loss of income. One interviewee successfully negotiated a comparable package which compensated for the loss of the TSLR when moving to a

school in a non-pilot area. This suggests the TSLR policy influenced the non-pilot school to match the salary.

It's difficult to know when to ask about salary in an interview, but I waited until the end. They'd offered me the job. And then I was honest, 'I want to work here, I want the job.' Like you said, it's the next step in my career. But if I were to stay at [name of pilot school], I'd be getting the same money for less responsibility because of [TSLR]. To make it financially viable, I would have to start on X amount of money. And they were happy to do that. – *Teacher, Claimant, French*

TSLR also exerted less influence on interviewees moving out of the state teaching sector or away from teaching entirely. These interviewees were motivated by additional financial or professional rewards and thought their resulting uplifts in salary would more than compensate any lost reimbursement.

In some limited instances, interviewees said they would consider moving abroad where they believed they would have higher salaries and a better work-life balance.

In Kuwait ... I know for a fact that if I were to take on extra responsibilities there, I'd be properly compensated for it. – *Teacher, Claimant, Chemistry*

A headteacher from a non-pilot area also reported that they had already lost teachers to overseas teaching jobs over the last couple of years.

Similarly, a small number of interviewees were considering a move into the independent sector rather than leave teaching altogether. There was a perception amongst these interviewees that classrooms would be more manageable, and there might be fewer targets or pressure than what they currently experienced in state funded schools.

## **Influence of different reimbursement values on retention**

Larger reimbursement amounts exerted a stronger influence on remaining a teacher. Nearly three quarters (73%) of eligible pilot area respondents said an annual £48 student loan reimbursement was “not influential at all” in a decision to continue teaching in the next two years<sup>37</sup> (Figure 10, overleaf). In comparison, an annual reimbursement value of £1,656 per annum would be “very influential” for a third (32%) of eligible respondents and exerted at least some influence on more than seven in ten respondents (72%). There is

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<sup>37</sup> How influential, if at all, would having the following annual amounts reimbursed be on your decision to continue teaching over the next two years?



no statistical difference in views on reimbursement values from non-pilot area respondents.

As outlined earlier, interviewees often stated that their reimbursement was a 'nice to have' and a reward in recognition of their hard work. TSLR could also compensate their (perceived) lower salary compared with other graduate professions. In line with the survey findings, interviewees reported that higher repayments (£101 or £138 per month) were more influential on remaining a teacher. However, most interviewees said the incentive would be insufficient to keep them in the profession if they were experiencing push factors that affected work-life balance, like an unmanageable workload.

Interviewees also discussed how location (where they grew up, live and teach) was a key factor in the value placed on TSLR. The incentive carries more weight for those living in relatively expensive areas and those with less financial resources.

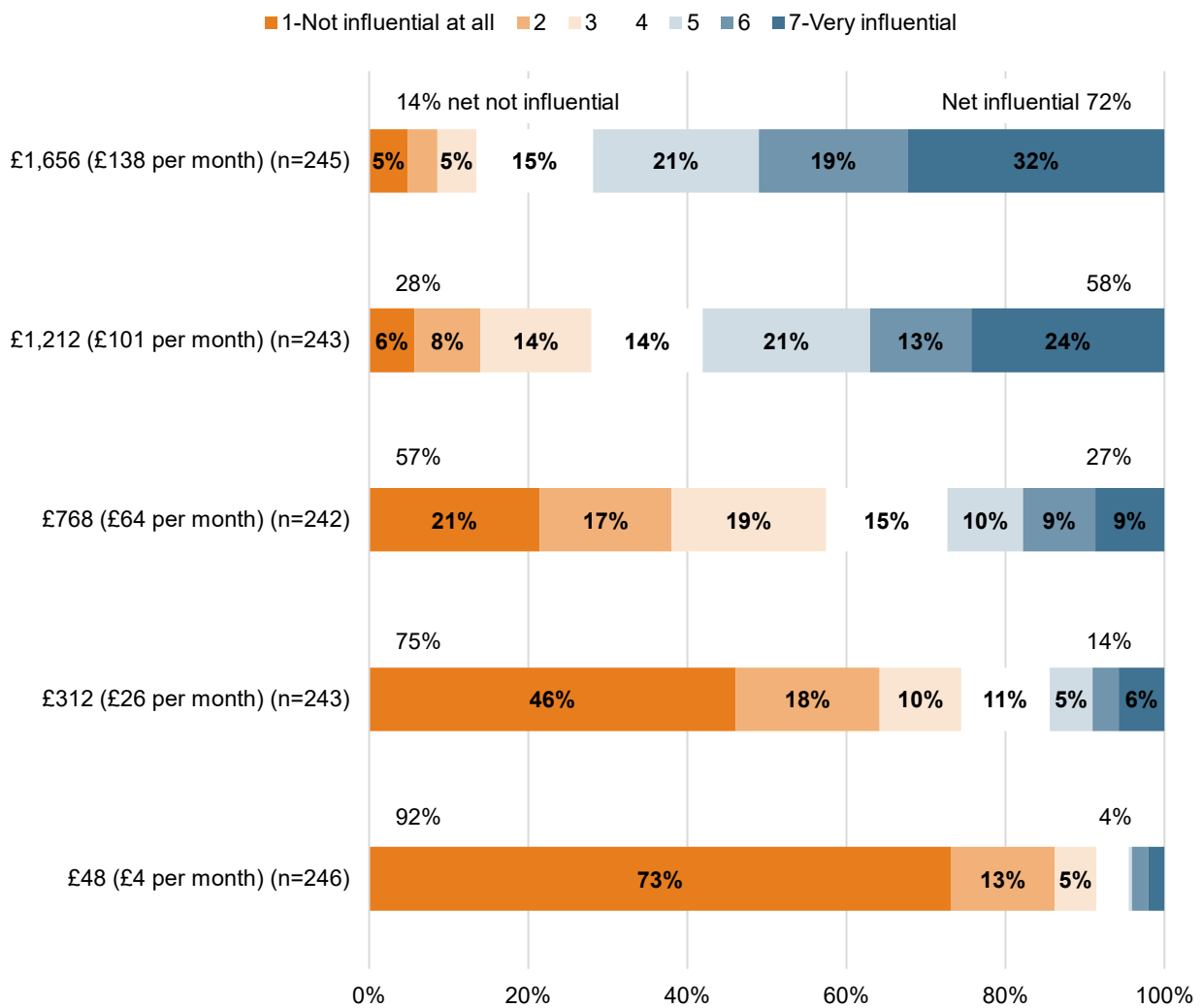
### **Salary, other incentives and staying in the profession**

Interviewees with a wealth of teaching experience said that salary becomes increasingly important as teachers' careers progress because their financial commitments (families, mortgages, etc.,) increase over time. These interviewees also equated their salary to the value others place on their profession and wanted to feel rewarded for their commitment.

The small number of interviewees with children reported entering or staying in the profession because of the school holiday entitlement. They viewed this entitlement as a benefit no other profession could provide and suggested that it was an influential incentive to train and stay in the profession for teachers in these circumstances.

I now have a young son; my holiday is my son and that's it. No other job is going to give me 13 weeks holiday per year. It kind of became a no brainer for me to retrain. – *Teacher, Claimant, Biology*

**Figure 10: Influence of different reimbursement values on remaining a teacher**



Source: Pilot area teacher’s survey. Bases in chart: Eligible with outstanding loans excluding don’t know. Net percentages sometimes do not sum to individual percentages due to rounding.

Financial considerations were important for interviewees who felt they had few alternative career options. Interviewees with families and financial commitments, including mortgages, said they could not afford to leave the profession and retrain. The desire for higher salaries was also felt more keenly, across interviewees, when they compared teaching salaries with those offered in other sectors, which they perceived often offered more money for less stress. Interviewees commonly reported that a teaching salary does not adequately reflect their professional workload.

## Workload and work-life balance as a reason for leaving the profession

A common theme amongst interviewees was a concern about high workload which is a long-standing issue in the profession<sup>38</sup>. The COVID-19 pandemic and the changes this has brought about within schools was also perceived to have exacerbated workload amongst interviewees.

I think teacher workload is one concern. Obviously, the whole pandemic has been quite difficult, especially with like teacher assessed grades, you know, things like that. I think if it was to continue increasing, then that's something I would have to, sort of, think. You know, because it's just getting that work-life balance, isn't it? – *Teacher, Claimant, Computer science*

In some cases, interviewees explained how teaching experience helped them to develop prioritisation skills and workload management strategies. Some more experienced interviewees suggested that achieving and maintaining a work-life balance is important to newly qualified teachers because they think a high workload and a poor work-life balance are key reasons why new teachers, particularly those who are younger and lack project management experience gained from other jobs, leave the profession. DfE's Early Career Framework guidance is designed to provide new teachers more time to adjust to the profession through limiting teaching timetables in years 1 and 2<sup>39</sup>.

## Balancing views on finances with decisions about remaining a teacher

Interviewees commonly reported salary and financial incentives in balance with other factors when making choices about remaining a teacher. For example, salary may be less favourable in the context of high workload which can make careers in other sectors more attractive. In this scenario, interviewees added salary into the criteria they use to balance the benefits and drawbacks of teaching.

We don't go into it for the money. But it is a major factor for people leaving the profession ... when you realise that, actually you can earn a lot more doing other things and have less stress. – *Teacher, Non-Claimant, German*

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38 Workload covers a range of tasks and activities to contribute towards teachers working hours. DfE resources to tackle workload are found here: <https://www.gov.uk/government/collections/reducing-school-workload>

39 As part of the early career framework (ECF) reforms in 2021, Early Career Teachers now receive a two-year induction rather than the one year than NQTs previously received. This includes a 10% timetable reduction in their first teaching year and 5% in the second. Full details of the reforms are available here: <https://www.gov.uk/government/publications/early-career-framework-reforms-overview>

## Professional factors and school context

Interviewees who felt comfortable and supported in their school reported being happier in their roles. These interviewees thought their school had good policies to address workload and teacher wellbeing issues, a strong leadership, clear vision and effective tools to manage behaviour. For this group of interviewees, the reimbursement often formed part of a wider package alongside teaching and learning responsibility (TLR) payments. For them, TSLR reinforced existing positive views about the profession. In a few instances, interviewees in this position said the loss of the incentive after eleven years would likely be counteracted by other factors such as job satisfaction or career progression.

I'll be doing the same thing until I retire, unless workload and the priorities of the school change, then obviously I would reassess. Financial incentives are only going to be effective if you actually want to remain in the career. From my point of view, I want to be in the career, so it's a lovely, 'well done, thank you for choosing to be a teacher'. – *Teacher, Claimant, Physics*

## Cost of living is particularly problematic for teachers with families

The increasing cost of living was a growing concern amongst interviewees with families or those considering starting a family. These interviewees said it was increasingly difficult to support a family on a teaching salary. Occasionally, interviewees without family commitments became inclined to see their financial pressures as outweighing their love for the job, pushing them to think about leaving in the next five years.

It's the sort of thing where the people that stay doing it are the people that love it.... In five years, if it continues with behind inflation pay rises and continues at the current rate of work and continues down the path it's going down, it's hard to say, but I would be probably leaning heavily against it. – *Teacher, Non-Claimant, Physics*

However, interviewees who were more concerned about the cost of living reported that lower TSLR reimbursements (irrespective of their value) remained significant because of the pressures of meeting their outgoings on a teacher's salary.

Every month, it's always, like, trying to split your money up for everything you have to pay, and I think every bit that you can get will make a difference. You know, £20-odd, £30 could be nearly a week's food shop. So, £100-and-something, so it all adds up, doesn't it, to something? So, at the minute, that does make a difference to us. I mean, I wish I could say it didn't, but it does. – *Teacher, Claimant, Spanish*

Interviewees described a variety of life circumstances that explained why they valued reimbursements. In some instances, interviewees said they supplement their income with other work (tutoring and exam marking were mentioned). Those with higher levels of student loan debt, or those who expressed concern about their debt, also welcomed their reimbursement. Location also influenced the value placed on their reimbursement, with those living in areas with higher-than-average living costs particularly appreciating TSLR.

However, interviewees' financial circumstances and attitudes towards debt were important contextual factors in shaping their decisions to remain in teaching. For example, those experiencing financial pressures also reported that they were more likely to explore other career options outside teaching where they were likely to make more money.

Will [TSLR] be a factor in my decision whether to stay in teaching or not? It will factor into it. Will it be a factor that tips me one way or the other? Probably not. Because the extra £125 a month, whilst useful, great, if you're talking about inflation at 8%, and energy bills have doubled in the past few months, it goes towards it and it's great, but I might have to start seeking higher-paying work at some point. –  
*Teacher, Non-Claimant, Physics*

## Headteachers' concerns about retention

The School Workforce Census shows nearly 7 in 10 (69%) teachers are still teaching five years after qualification: this means three in ten left the profession<sup>40</sup>. The rate at which teachers leave the profession after five years slows: a further one in ten leave over the next five years since qualification.

Counter to data from the School Workforce Census, around half of headteacher interviewees believed teachers were leaving the profession in greater numbers in the last few academic years than they had done previously. These headteachers attributed this change to a higher than anticipated workload amongst teachers, and teachers' disillusionment with the rewards versus the amount of work expected of them.

Reasons for leaving are to do with, again those individual staff's perception of their workload, the fact that they don't have a work and home life balance. – *Headteacher, Pilot Area*

In one instance, a headteacher thought fewer new teachers view the profession as a lifelong vocation and are therefore less willing to continue if they face significant barriers. Another headteacher perceived that the impact of COVID-19 led to less support for

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40 School Workforce in England, Reporting year 2021. <https://explore-education-statistics.service.gov.uk/find-statistics/school-workforce-in-england>

teachers, particularly amongst those new to the profession. They reported that the pressures schools were under during this time meant that the support being offered to newer teachers was not adequate.

I think the ECT experience during lockdown was probably not as good as it could have been, but, you know, that's the nature of what we all went through. – *Headteacher, Non-Pilot Area*

## **Headteachers' retention strategies**

### **Supporting teacher progression and development**

Overall, headteachers reported that teacher retention was less problematic than recruitment. However, they identified teacher workload and limited pathways for teacher progression as the key issues affecting teacher retention within their schools. Headteachers from smaller schools commonly said limited progression opportunities within their own schools affected retention. They described how teachers who wanted to progress often moved schools for promotional opportunities which also offered better salaries that the headteacher (in the smaller school) could not always match. One headteacher said a few of their experienced teachers were reassessing their careers and deciding to retire or leave the profession early, particularly since the pandemic. As a result, interviews with headteachers revealed a worry that they will lose and not replace teachers with the resilience needed for a teaching career.

It takes that time to build people up, the resilience, the skill set, learning that classroom craft that will get the best out of them [the children], there is a real concern that we're going to lose that. – *Headteacher, Non-Pilot Area*

Investing in teachers' continued professional development (CPD) was another key strategy headteachers reported using to minimise staff turnover. MATs were more likely than others to report having a developed CPD programme for their teachers. For example, one school that had strong links with local teacher training providers, recruited trainees who performed well during their placements and then provided them with a programme of CPD to help them progress within the school. Another school developed a mentoring scheme for teachers to shadow more experienced teachers.

Our turnover is so low. It's the work that we do to invest in our staff through professional development and personal growth. We've developed bespoke programmes which are shadow roles which really do expose staff to that growth and development. – *Headteacher, Pilot Area*

Whilst headteachers from MATs reported more flexibility to offer higher salaries to retain their strong teachers, headteachers from smaller schools offered extra in-kind benefits in an attempt to retain staff and make vacancies more attractive to new candidates. For example, they offered staff more planning, preparation and assessment (PPA) time to be able to access CPD. A limited number of headteachers from smaller schools said they were unable to offer higher salaries and so saw CPD opportunities as the only way they could compete for staff with larger schools. A couple of these headteachers also thought TLSR could function as a further incentive to help strengthen their offer to prospective teachers.

If new teachers knew about [TSLR] and thought, 'Well, actually, if I've got a choice, I can work there or I can work there, and if I work in that one, I'm eligible for this payment,' then yes. It might [attract them]. It might just swing it in our direction .... I need to tell staff about this. –  
*Headteacher, Pilot Area*

### **Flexibility on contracts and working conditions**

Retaining good, experienced teachers was important to all the headteachers interviewed in this research. Some headteachers sensed an emerging trend towards existing teachers requesting a move to part-time roles for a small number of experienced teachers to mitigate workload challenges. Headteachers in schools not part of a wider academy trust reported that this had a greater impact on their schools, as they had fewer staff to compensate for resulting gaps in teaching capacity. This also caused more significant issues for rural schools who struggled to find temporary staff and permanent part-time replacements due to poor transport links.

Commonly, headteachers reported that they wanted to reward and retain experienced teachers to ensure they did not move to a different school, often for promotions. However, headteachers interviewed from smaller schools found this difficult to do because of budget limits. Smaller schools need to make savings elsewhere if they want to offer larger salaries to teachers of shortage subjects. In contrast, headteachers within MATs reported more flexibility within budgets to use financial incentives to retain teachers, and most of those interviewed were willing to do this whenever possible.

We look at the recruitment and retention allowances we pay to staff, particularly in shortage areas. The school also has a long-standing policy of a finder's fee for staff in what are termed shortage subjects.  
– *Headteacher, Non-Pilot Area*

### **Taking care of teachers' wellbeing**

Headteachers typically reported that they invested in policies to support teacher wellbeing in their school because such policies improved recruitment and retention and

nurtured resilience amongst their staff. Headteachers within MATs more frequently cited such policies because they had access to larger, flexible budgets and a wider range of on-site facilities, including gyms. Headteachers provided examples of further actions taken by some schools like issuing work email embargos out of normal school hours and offering access to external counselling services. Several headteachers from MAT settings were keen to explore additional options to improve working terms and conditions for their staff to further improve staff wellbeing. One headteacher was exploring using health insurance to improve teachers' access to healthcare.

All headteacher interviewees agreed that a supportive school culture is crucial and anything that they can do to be more flexible and minimise the workload burden is essential to retaining staff. Actions cited by headteachers included passing all email correspondence through the school office rather than it going directly to teachers, or removing one responsibility from a teacher if they are given a new one. One headteacher explained that these types of actions can protect teachers from unnecessary administration, enabling them to concentrate on the job of teaching. Other examples included reducing the amount of marking and report writing for teachers, and employing additional support staff to alleviate pastoral and behaviour management pressures. A common theme amongst headteachers was a desire to give teachers a more flexible working week or early and flexible finishing times.

We are looking at ways in which we can give time to teachers, where they can finish early if they've got PPA [planning, preparation and assessment] or missed an opportunity. – *Headteacher, Non-Pilot Area*

### **Rewarding classroom teachers**

While most headteachers said they invested in CPD and teacher progression routes as a way to retain their staff, there were a small number of teachers who reported that they had no desire to progress and were happy being classroom teachers. These teachers thought leadership responsibilities increased workload and the shift from the classroom to more administrative and managerial tasks was less appealing to them. Headteachers felt there needs to be financial incentives for specialist classroom teachers so they can still retain and reward teachers with experience.

### **Headteachers' views of TSLR as a retention tool**

TSLR held appeal amongst some of the headteachers in pilot areas who had not been aware of the scheme before the interview. They suggested such schemes could reward teachers managing high workloads who do not get other financial incentives or pay increases. One headteacher felt the incentive could offset any negative effects on wellbeing caused by a student loan debt. They felt teachers concerned about their loan would derive more benefit from TSLR compared with receiving a one-off sum.



I think one of the things as a head you want to be able to do is offset some of that pain with less just thinking of it as a financial thing, but more almost like a wellbeing package. The nature of paying back debt [affects] wellbeing – *Headteacher, Non-Pilot Area*

A small number of headteachers who were unaware of TSLR's details prior to the interviews thought that the multi-year design of the scheme may be sufficient to keep teachers in the profession for longer. They thought offering incentives over several years is a better way to retain teachers compared with “upfront” incentives (several mentioned golden hellos) where teachers can leave without committing to the profession or paying anything back.

Fewer headteachers in non-pilot areas said that financial incentives (and specifically TSLR after it was explained to them) would help retain teachers. Although schools outside of pilot areas are ineligible for TSLR, many experienced similar recruitment and retention challenges as schools within the pilot areas. A small number of these headteachers viewed financial incentives as a temporary fix for a fundamental problem of teacher workload and low salaries.

I see incentives as sticking plasters. They're there, they create good soundbites, they solve a temporary problem in a certain area, or in a certain school, for a certain amount of time, but the fundamental, structural problem is there aren't enough teachers and we're not paying them well enough. – *Headteacher, Non-Pilot Area*

### **Targeted incentives are perceived as inequitable**

Targeted teacher financial incentives aimed at specific groups of teachers to address teacher shortages were seen as inequitable by a few interviewed headteachers. These interviewees felt incentives should be available to all teachers. They thought that teachers perceive targeted financial incentives in the same school as unfair and that such incentives can have a negative rather than positive impact on retention. Teachers who were claiming TSLR also acknowledged this, as well as those who had not claimed.

I think if we're talking about rewarding teachers to be teachers, we're making all sorts of payments for other reasons than being a great teacher. [There may be a reverse impact. Teachers may say...] 'Okay, I'll do the usual stuff, stay for X years to make sure I get that payment and off I go.' I think we're not providing a sustainable route by doing that. – *Headteacher, Pilot Area*

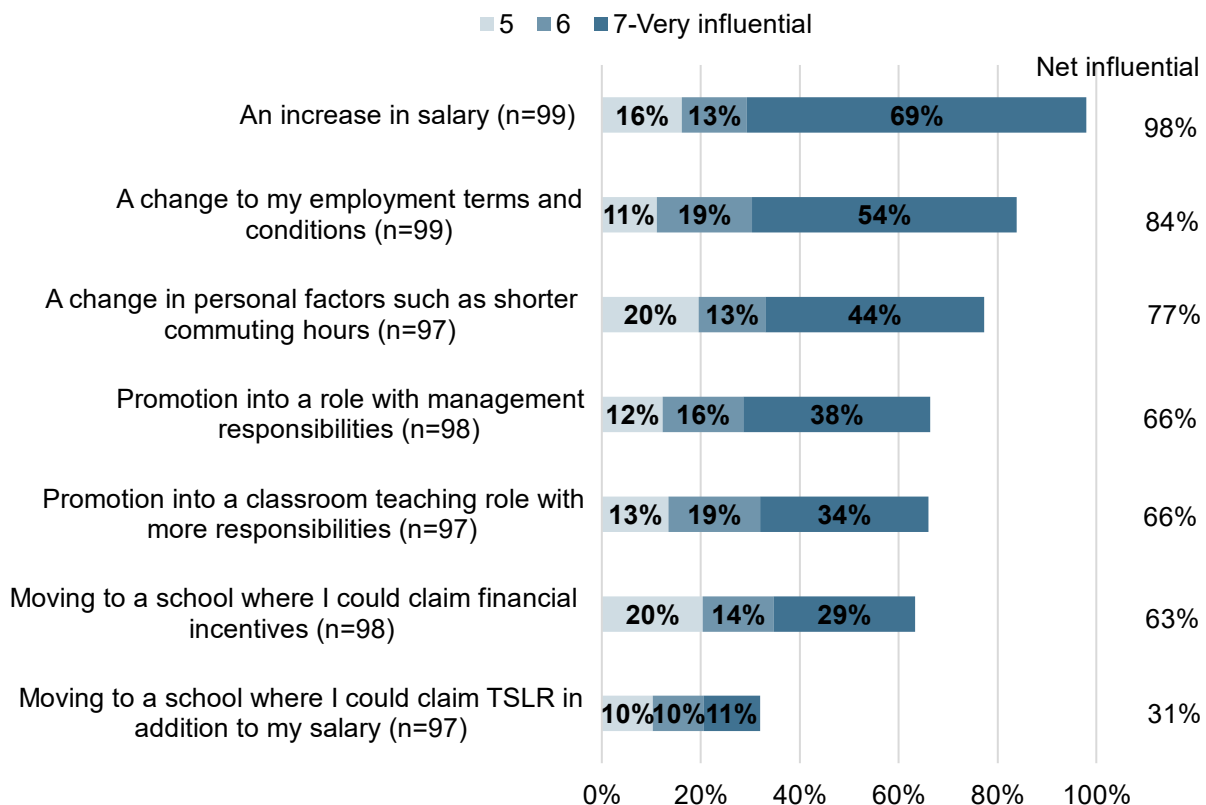
If it's a case where [an incentive is] differentiated and ... some subjects get the short end of the stick, then ... it's not something that

I'll be a fan of. I'd rather have something across the board, but everyone gets the same. – *Teacher, Claimant, Chemistry*

## Factors influencing career decisions of teachers outside of pilot areas

Non-pilot area teachers were asked whether seven factors would influence a decision to apply for another teaching position<sup>41</sup>. Figure 11 shows whether a factor would influence teachers who would be eligible if they worked in a pilot area. TSLR was the least influential factor of the seven although three in ten (31%) said TSLR would exert some influence on a decision to apply for another teaching post. Financial incentives in general were more influential for nearly two-thirds (63%) of respondents. In comparison, an increase in salary would influence nearly every respondent: seven in ten (69%) said a higher salary is “very influential”.

**Figure 11: Self-reported influence of different factors on applying for another post**



Source: Non-pilot area teacher’s survey. Bases in chart: Eligible if worked in a pilot area excluding don’t know.

Net percentages sometimes do not sum to individual percentages due to rounding.

<sup>41</sup> How influential, if at all, would the following factors be when deciding to apply for another teaching position? This uses the same seven-point scale as above where 1 = not at all influential and 7 = very influential. Only the “influential” scores of 5, 6 or 7 are presented.

# Conclusions

## Awareness

Reported awareness of TSLR amongst teachers increased as the evaluation progressed and the scheme became more established. Teachers who made a claim were better able to identify features of the scheme in surveys compared with those that did not make a claim. Communications to this point successfully explained the key features of TSLR to respondents, especially the subject criteria and the requirement to work in a certain location to qualify.

By the time of the last survey, more than a quarter (28%) of respondents said they first heard of TSLR via other teachers. More than four in five respondents in pilot areas (84%) used the DfE website to learn more about the scheme. The first application round was in September 2019 and the time elapsed since saw significant global events which may explain why word of mouth remained such an important communication channel for eligible teachers to learn about the scheme. Some interviewees in 2022 said official sources of information, such as those on the DfE website, give credence that the scheme is genuine. Findings indicate that DfE's website is the most important tool available for providing accurate information and support for applicants, especially as several interviewees said they still received communication direct from DfE to old email accounts they rarely used.

Awareness amongst headteacher interviewees remained low throughout the evaluation. This applied as much to headteachers in pilot areas as to those in non-pilot areas. When the scheme was explained and discussed in interviews, headteachers broadly agreed the scheme had value. Headteachers were also deemed to be a credible source of information for teachers, so raising headteachers' awareness of TSLR could increase take up from eligible teachers.

## Processes

Respondents reported satisfaction with a well-functioning claims process. The main area of suggested improvement was clarifying when their reimbursement will be received, which would stop claimants regularly checking their bank accounts. Notifying teachers when the reimbursement has been made would also improve the process. The evaluation evidence recognises improvements made to the scheme since it began including a streamlined and more effective application process.

## Recruitment

At each stage of the evaluation, teachers reported that they were motivated to teach because they loved their subject and wanted to make a difference to children's lives. Most teachers said they are not drawn to teaching for financial reasons. Bursaries were noted as the most influential financial incentive for teachers entering the profession and were especially important to evaluation by participants entering the profession from other industries or for those with existing family and financial commitments, such as mortgages.

In 2019, a minority of respondents reported some influence from the scheme on recruitment between schools; when surveyed, a quarter of teachers interested in TSLR (24%) said they would consider moving to an eligible school if they could commute; 14% said they would move to an eligible area if it was like their current home. Later qualitative findings showed that TSLR exerted influence alongside other teaching and lifestyle factors when making choices about next steps. Once headteachers knew more about TSLR, a few also reported that they could use TSLR as part of a wider recruitment package. Therefore, TSLR could potentially influence some aspects of teacher recruitment.

## Retention

A third (33%) of surveyed teachers said financial incentives motivated them to continue being a teacher; 17% were very motivated by such incentives. The evaluation found that TSLR exerted some influence on where teachers teach (for example, in an eligible area or state-funded school) and in retaining teachers in the profession. TSLR's influence on teacher retention increases with the amount of the reimbursement.

However, other factors exerted a stronger influence on retention. Where respondents disagreed that 'teaching offers a good work-life balance' and that 'the workload of a teacher is manageable' they were less likely to say they would remain in teaching. Analysis shows these factors were statistically related to the likelihood to leave teaching within five years; therefore, TSLR appears limited in how it counteracts these factors in these specific circumstances. TSLR had some influence on retaining teachers who thought their workload was manageable and amongst those more concerned about their student debt. Consequently, the scheme's influence differs by teacher characteristics and attitudes.

The evaluation also finds experienced teachers develop workload management strategies, which may help some teachers overcome work-life balance challenges over time. There is some evidence that TSLR can retain teachers in the profession; 41% said TSLR exerted some influence on their decision to stay in teaching for the next year. If the scheme exerts some influence on retention, then this allows these teachers to gain more

experience, which could help them to develop better coping strategies for challenging aspects of the profession.

DfE also produced an internal impact analysis of retention detailed in full below. This found evidence of increased retention in eligible areas, although due to the relatively small sample size and variability the observation was not statistically significant, and so it was not possible to draw transferable conclusions.

## DfE's Internal statistical evaluation

To complement the evaluation by CFE, the Department for Education conducted a statistical evaluation, using administrative data on the teacher population. The aim of the study was to determine if the TSLR pilot had a measurable impact on year-on-year retention rates for teachers taking part in the pilot.

The School Workforce Census (SWFC) is an annual census of all teachers working in state schools. Using the census, we can determine if a teacher left the state school sector between one year and the next<sup>42</sup>. To evaluate whether the TSLR program had an effect on the probability of teachers leaving the profession, the study was designed to identify both the population of teachers eligible for TSLR (the treated group) and a relevant comparison group of teachers not eligible for TSLR, but otherwise similar (the control group). We found no statistically significant effect of being eligible for TSLR on the probability of leaving.

### Data and method

The analysis used SWFC data from censuses carried out in Autumn 2016 through to Autumn 2021, which allowed us to measure retention in 2016 to 2020 (the additional year's data identifies whether a teacher left the state sector in the previous year). Therefore, the data consisted of a five-year panel of the teacher population: three control years where TSLR was not active, and two active years, 2019 and 2020.

The outcome variable, the main variable of interest, is leaver rates. This was measured as the fraction of teachers in service in the current academic year, who had left service in the state sector (without becoming retired or deceased) in the following year. For example, the 'leaver' variable for a teacher in 2019 is based on a comparison of status in Autumn 2019, to status in Autumn 2020: it takes a value of 1 if the teacher was in service in 2019 and not in service in 2020, zero otherwise. As this outcome variable is a binary variable, logistic regression was used to estimate the effect of the TSLR pilot.

To ensure comparability of treated and control groups, the sample was limited to teachers under the following conditions:

- At most five years of experience
- Possession of qualified teacher status (QTS)
- Post recorded as a classroom teacher
- School either a secondary or special schools

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<sup>42</sup> It is not possible to distinguish between leaving the state sector for the independent sector, non-teaching school posts, or leaving the profession entirely. However, we can identify and exclude those entering retirement.

After restricting the dataset in this way, the main variables determining treatment (receipt of TSLR) were time (the years the pilot was running), subject (the eligible subjects), and location (schools in eligible areas). Full eligibility occurs at the intersection of these three conditions. Lacking data on which teachers actually received TSLR, the study instead evaluated the effect of being eligible for TSLR: this design corresponds to an ‘intention-to-treat’ design in a medical setting<sup>43</sup>.

The rules determining subject-based eligibility for TSLR were somewhat complicated, and in practice relied on self-declaration supported by head-teacher verification. Teachers train to teach one subject, but they often teach other subjects, and eligibility for the pilot was permissive to account for this. Subject eligibility was determined using two methods: qualification-based; and curriculum-based. The curriculum-based method, although closer to the actual eligibility criteria used, suffered from missing data issues and ambiguity in the administrative record. For this reason, both qualification-based and curriculum-based results are reported for comparison.

In addition to year, subject and location, the sample included variables found to be correlated with either TSLR eligibility or leaver rates. The following variables were included as covariates in some versions of the statistical design:

- Years since gaining qualified teacher status (QTS): a good proxy for years of teaching experience.
- Region: using government office regions
- Gender
- School type: LA maintained, free school, etc.
- Proportion of pupils in the school eligible for pupil premium: as a value from 0 to 1
- Overall Ofsted rating: outstanding as 1, down to inadequate as 4, included in the model as dummy variables

Age was not included, as almost all the teachers eligible for TSLR are young, and it would be too tightly correlated with years since QTS. Other variables were tested but did not have a large correlation with either eligibility or outcomes.

The sample included a total of 247,000 rows of data, each row representing one year for one teacher. The majority of these teachers were ineligible for TSLR and therefore formed the control group.

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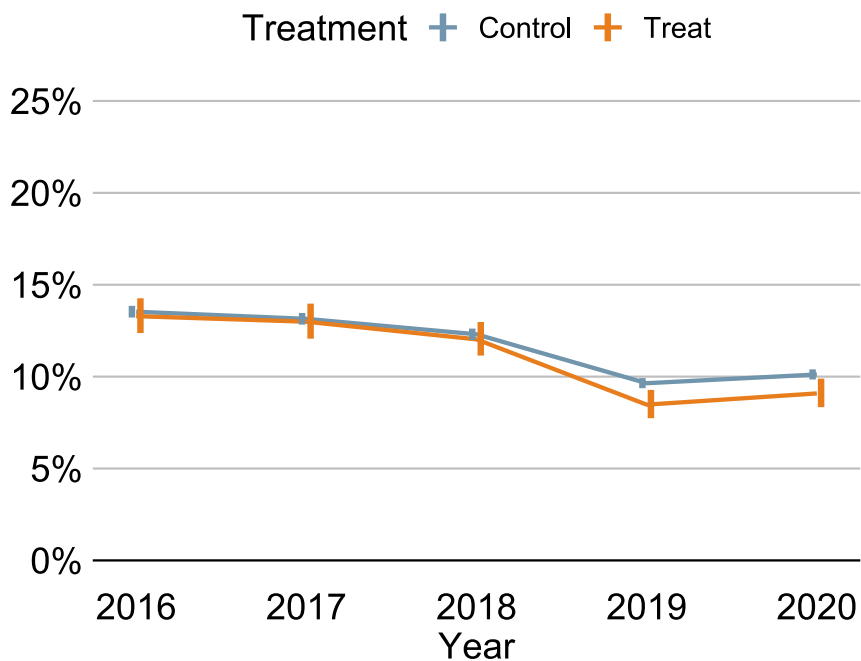
<sup>43</sup> Intention-to-treat design is not only the best that was possible given the data; it also has the advantage that estimates are less likely to be contaminated by ‘selection biases’: unobservable differences in motivation, circumstances or attitude between teachers who choose to apply and those who don’t.

## Group Comparisons

Before proceeding to the full regression outputs, it is useful to compare the eligible and ineligible groups, as determined by different parameters. For a pure difference-in-difference model, we would want the control and active groups to be roughly parallel in years prior to the effect being activated. For each of the following graphs, the results using curriculum data are on the right, while the results using qualifications data are on the left.

We begin with a simple comparison not using subject data, of leaver rates for eligible areas against ineligible areas in Figure 12. The treatment and control trends are similar, although the leaver rates in eligible areas have dropped slightly more since 2019.

**Figure 12: Proportion of teachers leaving by year – eligible areas compared to ineligible areas, not taking into account subject**



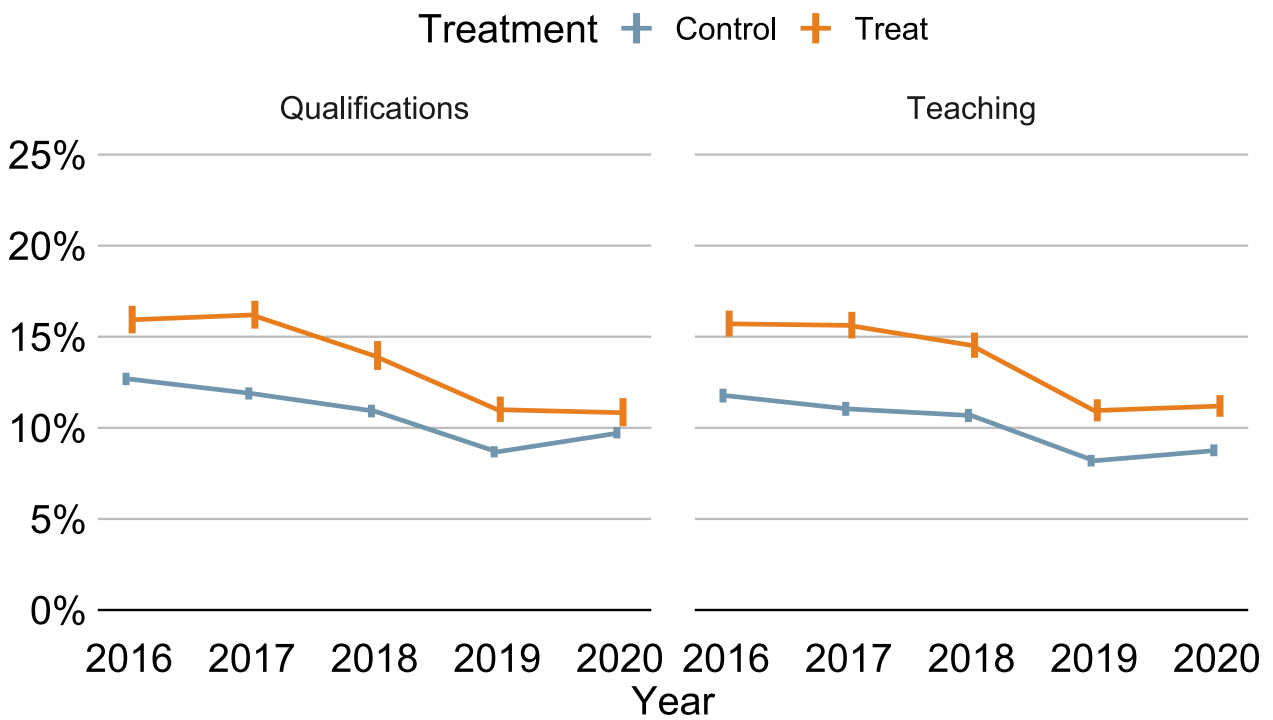
Source: School Workforce Census

If we instead look at eligibility by subject, in Figure 13, we see that the eligible subjects have significantly higher leaving rates. This difference is not surprising because the eligible subjects were selected as those with greater retention difficulties.

The parallel trends assumption (the assumption that the leaver rate trends were parallel before the introduction of the treatment in 2019) appears appropriate, although the trends are slightly less parallel when using the qualification-based subject criterion.



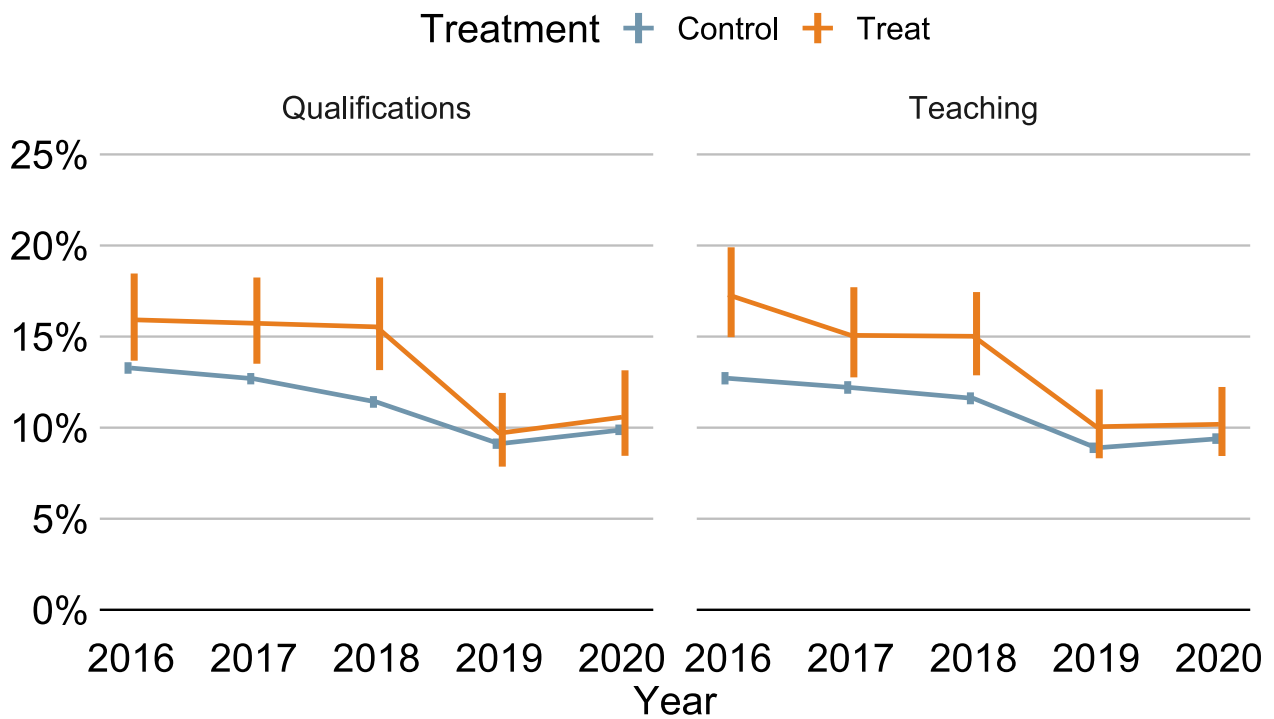
**Figure 13: Proportion leaving teaching – eligible subjects compared to ineligible subjects, not taking into account location**



Source: School Workforce Census

Lastly, combining the two conditions in Figure 14, so that we are looking only at those eligible on area and subject taught, the results are similar to Figure 13, but with much higher variance, as there are fewer teachers left in our ‘treated’ sample. Again, the parallel pre-trend assumption appears appropriate, more so using the qualification-based measure than the teaching-based measure.

**Figure 14: Proportion leaving teaching – eligibility by subject and location**



Source: School Workforce Census

## Results

The results in Table 10 (below) require a little explanation; for the mathematical details of the model used, a logistic regression model, see appendix B. The ‘estimate’ is the estimated average effect of being eligible for TSLR on area, subject, and year, corresponding to the three-way interaction term

YearEligible\*RegionEligible\*SubjectEligible in the design equation in Appendix A. This value is the difference in the log odds of leaving, between ineligible and eligible teachers, which is approximately the same as the percentage difference in the probability of leaving. The S.E. is the standard error of this estimate. The effect is estimated separately for the two years of the pilot: 2019 and 2020.

Below the estimates and standard error is the sample size. The next two rows indicate whether personal and other covariates were included, respectively. The bottom row indicates whether curriculum data or qualifications data was used to determine subject.

**Table 10: Results from the logistical regression model of leaver rates**

Model	Teaching, no covs	Teaching, person	Teaching, all	Quals, no covs	Quals, person	Quals, all
2019 estimate	-0.056	-0.106	-0.178	-0.182	-0.198	-0.198
2019 S.E.	0.181	0.184	0.208	0.187	0.189	0.189
2020 estimate	-0.114	-0.088	-0.200	-0.115	-0.122	-0.122
2020 S.E.	0.178	0.180	0.203	0.191	0.193	0.193
Sample N	189,556	187,139	160,202	210,844	207,490	207,490
Person covariates	No	Yes	Yes	No	Yes	Yes
Other covariates	No	No	Yes	No	No	Yes
Subject eligible variable	Curriculum	Curriculum	Curriculum	Quals	Quals	Quals

All of the estimates are negative, falling in the range -0.056 to -0.20. Taken at face value, the point estimates would imply TSLR having a negative effect on leaver rates of approximately 5 to 20%<sup>44</sup>. All of the standard errors are larger than their respective estimates, which implies that none of the treatment effects are significant. The model did detect significant fixed effects, such as from year and school type, validating the use of this model.

A couple of factors contributed to the lack of significant results. First, the size of the pilot was not sufficiently large to obtain precise estimates. Second, the pandemic exacerbated the variation in teacher retention decisions and created additional variability. The estimated standard errors imply that even effects on the order of a 30% reduction would have been insufficiently large to declare statistically significant.

<sup>44</sup> This means that the number of leavers would fall by 5 to 20%, not that the proportion would fall by 5 to 20 percentage points, which would be a much larger magnitude of effect.

## Appendix A: Regression models and correlations – survey data

Table 11: Linear regression – what determines whether a teacher thinks they will be teaching in 5 years' time.  $R^2 = 0.273$

Dependent Variable: In five years' time (On a scale of 1 to 7, where 1 is 'not at all likely' and 7 is 'very likely', how likely is it that you will still be a teacher...?)	B	Std. Error	Standardized Coefficients Beta	t-score	Significance	Tolerance	VIF
(Constant)	1.974	1.47	-	1.343	0.181	-	-
I love the subject that I teach (1 is 'not at all motivating' and 7 is 'very motivating')	0.326	0.099	0.224	3.301	<b>0.001</b>	0.894	1.118
The school in which I work effectively manages pupil behaviour (1 is 'strongly disagree' and 7 'strongly agree')	0.074	0.07	0.073	1.067	0.288	0.887	1.128
The workload of a teacher is manageable (1 is 'strongly disagree' and 7 'strongly agree')	0.284	0.102	0.192	2.788	<b>0.006</b>	0.868	1.152

£1,212 (£101 per month) (Amount would influence a decision to stay in teaching)	0.165	0.074	0.152	2.211	<b>0.028</b>	0.877	1.14
I worry about my student loan (1 is 'strongly disagree' and 7 'strongly agree')	-0.102	0.062	-0.11	-1.637	0.104	0.91	1.099
Been in teaching 2-5 years (yes / no)	-2.65E-01	0.263	-0.066	-1.007	0.316	0.972	1.029
Income	2.21E-05	0	0.076	1.108	0.27	0.879	1.137
Age of the respondent when survey closed on 25 May 2022	-0.042	0.027	-0.134	-1.564	0.12	0.563	1.777
Whether respondent is female (yes / no)	0.688	0.284	0.163	2.42	<b>0.017</b>	0.913	1.095
I plan to stay in my current role, in my current school (yes / no)	1.032	0.303	0.243	3.401	<b>0.001</b>	0.808	1.237
What is the total value of the student loans you have outstanding?	-0.193	0.086	-0.188	-2.24	<b>0.026</b>	0.584	1.713

**Table 12: Linear regression – influenced by financial incentives to stay in teaching. R<sup>2</sup> = 0.183**

<b>Dependent Variable: Motivated to stay in teaching by the financial incentives on offer to stay in teaching in addition to my salary (1 is 'not at all motivating', 7 is 'very motivating')</b>	<b>B</b>	<b>Std. Error</b>	<b>Standardized Coefficients Beta</b>	<b>t-score</b>	<b>Significance</b>	<b>Tolerance</b>	<b>VIF</b>
(Constant)	-1.758	1.303	-	-1.349	0.179	-	-
I love the subject that I teach ((1 is 'not at all motivating' and 7 is 'very motivating')	0.162	0.111	0.099	1.459	0.146	0.863	1.159
The school in which I work effectively manages pupil behaviour (1 is 'strongly disagree' and 7 'strongly agree')	0.121	0.075	0.109	1.616	0.108	0.881	1.135
The workload of a teacher is manageable (1 is 'strongly disagree' and 7 'strongly agree')	0.227	0.111	0.141	2.042	<b>0.042</b>	0.841	1.189
Still be teaching in three years' time (1 is 'not at all likely' and 7 is 'very likely')	-0.042	0.094	-0.037	-0.442	0.659	0.586	1.706
£1,212 (£101 per month) (Amount would influence a decision to stay in teaching)	0.142	0.085	0.118	1.678	0.095	0.812	1.231
I worry about my student loan (1 is 'strongly disagree' and 7 'strongly agree')	0.224	0.067	0.223	3.332	<b>0.001</b>	0.897	1.115
Been in teaching 2-5 years (yes / no)	-0.088	0.281	-0.02	-0.314	0.754	0.972	1.029
Income	1.22E-05	0	0.039	0.584	0.56	0.885	1.129
Age of the respondent when survey closed on 25 May 2022	0.049	0.022	0.146	2.268	<b>0.024</b>	0.963	1.039
Whether to stay in teaching (yes / no)	0.633	0.481	0.101	1.318	0.189	0.683	1.463
Whether respondent is female (yes / no)	-0.585	0.307	-0.128	-1.904	0.058	0.892	1.122

## Appendix B: Models for DfE's statistical evaluation

We fit six different models, all the same in form, differing only in the covariates and the precise eligibility data used.

The important variable that TSLR sought to influence, was the probability of teachers leaving the profession. This is influenced to a significant degree by the parameters used to determine eligibility for TSLR, such as experience and subject, and so it was necessary to control for these effects.

The model chosen for this was a logit-link generalised linear model (GLM). This works as follows. In a normal linear model, the output  $y$  is the sum of the effects of covariates  $x_i$ , each influenced by coefficients  $\beta_i$ . This can be expressed in block form as  $Y = \beta X$ .

In a generalised linear model, a link function  $g$  is applied so that  $g(Y) = \beta X$  which allows us to limit  $Y$ , which in our case is the probability of teachers leaving, to be in the interval  $[0,1]$ . The most appropriate link function for our model was a logit one, where:

$$g(p) = \log((p/(1-p)))$$

So, the overall equation is we have:

$$Y = (1+e^{-\beta X})^{-1}$$

This model not only ensures that our predictions are proper probabilities, i.e. between 0 and 1, but also lets us incorporate both continuous and categorical data in the same model.

Our models were in two sets based off the eligibility data, and three based off the covariates used, giving six in total. For the eligibility data, we used either the data from the SWFC on teachers' qualifications, which was almost always available but not necessarily corresponding to the subject they taught, or data from the SWFC on which subject teachers had spent the most time teaching, which was more likely to be missing.

Qualifications data was not collected for the 2020 census year, and therefore we will have missed any first-year teachers in that year, as there will have been no valid information about their qualifications.

For the covariates, there were three sets:

1. Only interaction terms: eligibility on year, subject and region, and their interaction terms, the interaction of all three giving the effects of TSLR
2. As 1, but adding in personal covariates such as gender
3. As 2, but adding in all other covariates

The final design equation will then be:

$$\begin{aligned}g^{-1}(Y) = & \text{YearEligible} + \text{RegionEligible} + \text{SubjectEligible} \\ & + (\text{YearEligible} * \text{RegionEligible}) + (\text{YearEligible} * \text{SubjectEligible}) \\ & + (\text{RegionEligible} * \text{SubjectEligible}) \\ & + (\text{YearEligible} * \text{RegionEligible} * \text{SubjectEligible}) + \beta X\end{aligned}$$

Here the  $\beta X$  indicates any covariates such as gender that we may have in the model; the effect term  $\text{YearEligible} * \text{RegionEligible} * \text{SubjectEligible}$  will indicate the effect of being eligible for TSLR. This is the three-way effect shown in Table 7 above.





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