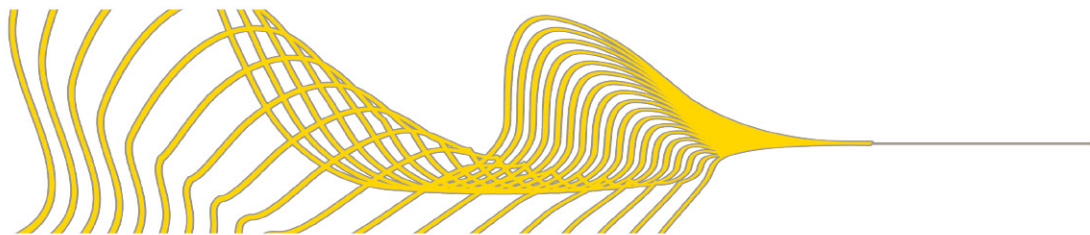


Environment Scan – 2010



Education Industry



Acknowledgments

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Chapter 1

Executive summary

The environment scan (Escan) provides Innovation and Business Skills Australia (IBSA) with an opportunity to gather industry intelligence on business directions and emerging workforce development issues and to consider it in the light of statistical information on training and industry trends. This report examines the key challenges facing the Education industry and considers their impact on workforce development.

The primary objective of the Escan is to advise government of industry skill and workforce development needs and investment priorities for Australia's VET system. The report will also be of interest to other audiences including: Registered Training Organisations (RTOs) intent on responding to industry workforce development needs; and enterprises developing and implementing strategies to build workforce skill and productivity.

This report identifies major challenges for the Education workforce that will require new and newly emphasised skills.

Workforce development challenge:	Impact on:	Critical future skills:
Regulatory and quality requirements	Education managers, auditors, trainers and assessors	<ul style="list-style-type: none"> Quality assessment practices and RPL Business planning Communications and customer relations
The speed of technological change	Educators, education managers and support staff	<ul style="list-style-type: none"> Creativity and design/innovation Converging technologies – including combinations of business, IT and creative skills Advanced computer and IT skills
An ageing workforce and access to suitable recruits	Education managers and workforce planners	<ul style="list-style-type: none"> Business continuity planning Succession planning and knowledge management
Public policy	Education managers and leaders	<ul style="list-style-type: none"> Adaptability – including the ability to change approaches to training and assessment and stakeholder engagement in response to changing industry requirements Supervision and leadership skills to help organisations through periods of change

The Education industry is crucial to the workforce capability of all other industries, but it also faces unique workforce development challenges of its own. With its responsibility for skilling the current workforce and preparing future generations for work and life, the Education industry is subject to intense public and political scrutiny and to frequent waves of policy change and review.

The VET system could support the development of critical new, emerging and updated skills for the Education workforce by:

- considering the role that VET qualifications can play in the development of the Education workforce beyond the VET sector
- creating education technology qualifications and supporting their implementation within and beyond the VET sector
- valuing and investing in professional development for the VET sector workforce
- developing transition programs to capture the knowledge and experience of exiting older workers
- identifying and promoting career pathways and development opportunities to attract new recruits into the industry.

The Escan research and consultation process has generated a list of occupations in demand for the Education industry Appendix 1. Skilling for these occupations will require specific attention in workforce development strategies.



Chapter 2

About this report

This report accompanies and underpins IBSA's environment scan (Escan) 2010. It focuses on the workforce development needs and realities of Australia's Education industry. The report has been developed using statistical data available from the Australian Bureau of Statistics (ABS) and the National Centre for Vocational Education Research (NCVER) and with direct industry input through IBSA's consultation and survey processes. The research methodology used to prepare the report is explained in Appendix 3.

The purpose of this report is to identify issues and challenges that are specific to the Education industry and to examine their ramifications for workforce development. Key findings and recommendations from this report have been incorporated into the IBSA Escan 2010.

It should be noted that, much to the despair of statisticians, there are no unambiguous boundaries that can be used to capture and describe industries and their workforces. ANSCO and ANZSIC classifications used for data collection can sometimes fail to represent reality as it is understood by enterprises or individuals. For this reason figures and predictions about industry size and occupational cohorts should be regarded as indicative rather than as exact quantities.

Terms:

Terminology used to describe occupations in the VET sectors varies across jurisdictions and different parts of the industry. In the interests of readability this report has adopted the following terms:

1. Trainer – to encompass VET teachers/trainers, VET assessors and VET leaders/managers
2. Educational support staff – to encompass non-teaching/assessing and non-management staff working in the Education industry (includes non-teaching librarians and IT technicians, student welfare officers, administrative staff)
3. Education industry – to encompass the all of the Education and Training industry including: early childhood education, school education, higher education, vocational education and training and adult and community education

Chapter 3

The Education industry

The Education industry is the fifth largest in Australia employing 790,400 (7.3% of the total workforce)¹. It is also one of Australia’s fastest growing export sectors² contributing \$17.2 billion in export income to the Australian economy in 2008-09³.

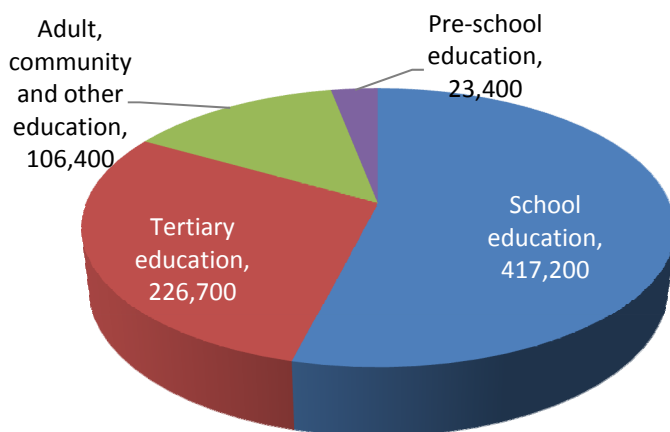
The Education industry includes the sectors of:

- early childhood education
- school education
- higher education
- vocational education and training
- adult and community education.

The school education sector dominates employment in the industry with 417,200 workers (or 53.9% of the industry workforce).

Figure 1:

EDUCATION INDUSTRY SECTORS – WORKFORCE SIZE



Source: SkillsInfo Employment Outlook: Education and Training, February 2009

Figure 1 shows workforce numbers for all workers employed in the Education industry. These figures include non-educational support staff employed in the industry, such as cleaners, administrative officers, bookkeepers and technical support. Note also that the ABS uses ANZSIC for industry data collections, which combines higher education and VET into a single tertiary sector.

¹ SkillsInfo *Employment Outlook: Education and Training*, February 2009

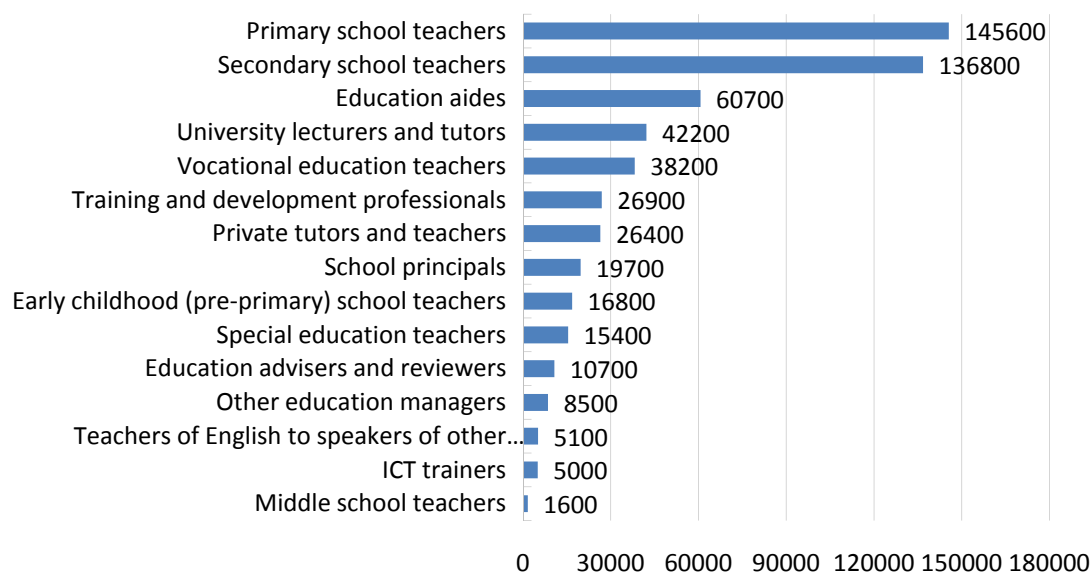
² Austrade website: <http://www.austrade.gov.au/Buy/Australian-Industry-Capability/Education-and-Training/default.aspx> – accessed 11/01/10

³ AEI, *Research Snapshot*, December 2009

A clearer indication of workforce size can be gained by focussing only on occupations requiring Education industry specific skills. Totalling the occupations shown in Figure 2 produces an estimated Education industry workforce size of 559,600.

Figure 2:

EDUCATION INDUSTRY OCCUPATIONS – WORKFORCE SIZE



Source: joboutlook.gov.au, based on Australian Bureau of Statistics (ABS) Labour Force Survey (February 2009)

The Education industry in Australia is primarily publicly funded with government the source of approximately 72% of all education funding⁴. However, private contributions are higher in the tertiary sector where around 50% of funding is from private sources – including from domestic students via fees and HECS, from other private entities (enterprises) and from international students. The public share of funding for the tertiary sector has declined from approximately 65% in 1995⁵.

In 2008 the number of international students enrolled to study in Australia increased by 20.7% to 537,893⁶. Despite the global downturn and the higher Australian dollar, international student enrolments increased again in 2009 and stood at 629,618 for the year to November 2009⁷. In 2008-09 higher education attracted 57% of Australia's income from international education and VET accounted for a further 26%. The remainder was generated by the schools sector (5.7%), English language intensive courses for overseas students (6.2%) and non-award courses (3.4%)⁸. However, in 2009 the VET sector attracted the largest number of enrolments and commencements and grew faster than all other sectors of the industry⁹.

⁴ Organisation for Economic Cooperation and Development, *Education at a glance 2009: OECD Indicators*, 2009

⁵ Organisation for Economic Cooperation and Development, *Education at a glance 2009: OECD Indicators*, 2009

⁶ Austrade website: <http://www.austrade.gov.au/Buy/Australian-Industry-Capability/Education-and-Training/default.aspx> – accessed 12 January 2009

⁷ AEI, *Monthly Summary of International Student Enrolment Data – Australia*, YTD November 2009

⁸ AEI, *Research Snapshot*, December 2009

⁹ AEI, *Monthly Summary of International Student Enrolment Data – Australia*, YTD November 2009

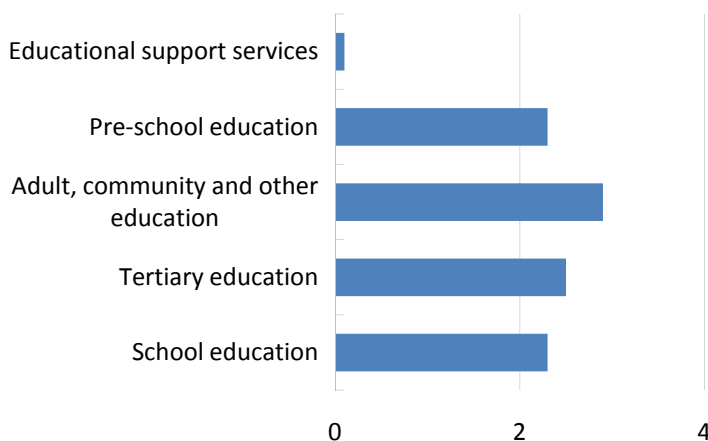
Chapter 4

Employment trends

According to DEEWR’s SkillsInfo industry outlook¹⁰, long term job growth in the Education industry has been increasing steadily with an average annual growth rate of 2.3% for the past 10 years. Projected employment growth for all of the major Education sectors is stable at 2–3% pa for the next five years¹¹.

Figure 3:

PROJECTED EMPLOYMENT GROWTH TO 2103-14



Source: SkillsInfo Employment Outlook: Education and Training, February 2009

In consultations with IBSA, Education industry representatives have questioned the accuracy of the SkillsInfo employment projections in Figure 3. Growth in the educational support services sector may be significantly understated, data for this sector may not be representative perhaps due to the very small workforce size (according to SkillsInfo employment was so small in February 2009 that it was rounded to 0.0% - it is possible that some employment in this sector is actually being picked up within the other sectors of the Education industry).

¹⁰ DEEWR prepares annual updates of employment projections for industries for the next five years. These are based in part on the Monash model developed by the Centre of Policy Studies at Monash University, but also take into account recent employment trends and prospective industry developments. Current projections are based on data available in February 2009. It should be noted that a certain degree of uncertainty is attached to these employment projections, especially where employment growth is highly correlated with macroeconomic and global conditions.

¹¹ SkillsInfo Employment Outlook: Education and Training, February 2009

Chapter 5

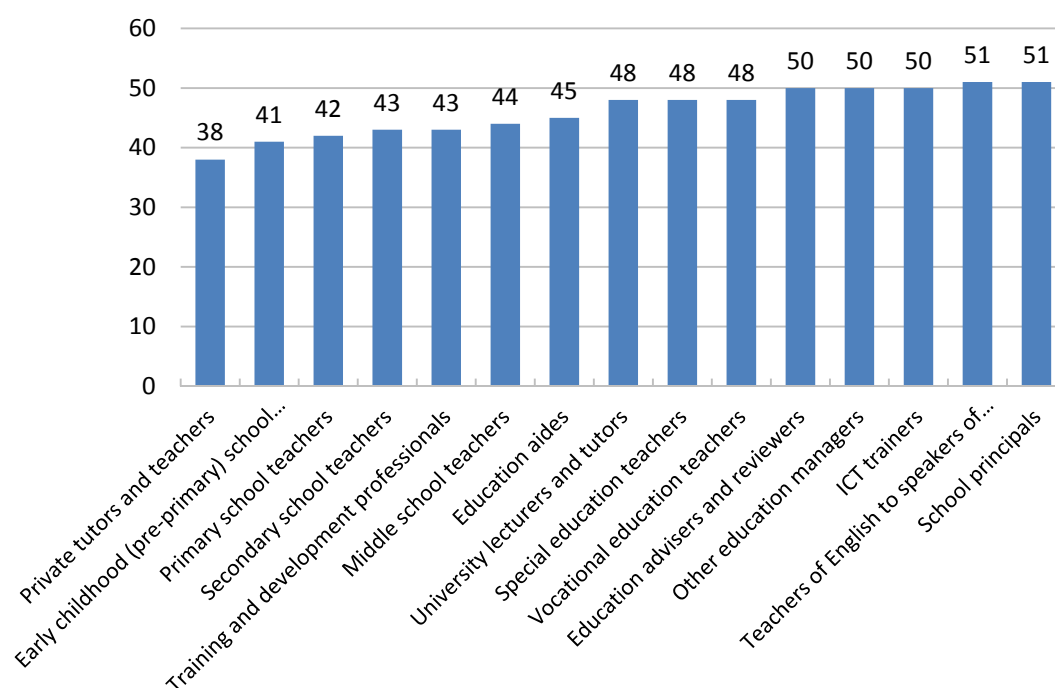
The Education workforce

The Education industry workforce is considerably older than the Australian workforce as a whole. The median age of 45 years for the Education industry is well above the median age of 37 years for all industries. Of the 19 broad ANZSIC industries Education has the largest proportion of workers in the 45-54 years age range (17.9%)¹². More than half of all workers in the industry are over 45 years.

Some occupations, such as principals, education managers and education advisers and reviewers, can be expected to have an older median age because entry into the occupation generally requires a lengthy career pathway. While this expectation does not apply to all occupations within the Education industry, entering the Education industry – particularly VET – is frequently a ‘second career’ for people who have worked in other fields first.

Figure 4:

MEDIAN AGE BY EDUCATION INDUSTRY OCCUPATION



Source: joboutlook.gov.au, based on Australian Bureau of Statistics (ABS) Labour Force Survey (February 2009)

The Education and Training industry is predominantly female (69.8%) and the proportion of the workforce employed full-time (63.3%)¹³ is lower than the average for all industries (71.5%). In the Adult, Community and Other Education sector the proportion of the workforce employed full time is only 44.3%.

¹² SkillsInfo Employment Outlook: Education and Training, February 2009

¹³ SkillsInfo Employment Outlook: Education and Training, February 2009

Chapter 6

Workforce development

Pathways into much of the Education industry are via higher education qualifications. As the major employer for early childhood and school education, State and Territory governments determine minimum skill and qualification requirements for entry into the teaching profession.

Within the VET sector minimum qualifications for trainers and assessors are specified within the Australian Quality Training Framework (AQTF). Higher education institutions and providers of non-accredited training are able to determine their own requirements for people in educational roles.

Given the high use of higher education qualifications in the Education industry, to date IBSA has concentrated primarily on the needs of the VET workforce with the Certificate IV in Training and Assessment TAA (TAA40104). Other qualifications currently available in the Training and Assessment and Business Services Training Packages are:

- TAA50104 – Diploma of Training and Assessment
- BSB50907 – Diploma of International Education Services
- BSB70207 – Vocational Graduate Certificate of International Education Services
- BSB70108 – Vocational Graduate Certificate of Management (Learning)
- BSB80108 – Vocational Graduate Diploma of Management (Learning)

IBSA has started work on the development of a new Training Package for Training and Education – TAE10. Along with the qualifications listed above, TAE10 will house:

- a newly developed, and yet to be endorsed, Vocational Graduate Certificate Adult Language, Literacy and Numeracy
- a newly developed, and yet to be endorsed Vocational Graduate Diploma in Adult Language, Literacy and Numeracy
- the recently revised, and yet to be endorsed, Certificate IV in Training and Assessment.

There is scope in future for IBSA to explore the vocational skill needs of the Education industry more broadly. Potential areas for consideration include:

- add-on skill sets and post-graduate career development options in specialist areas for professionally qualified teachers
- VET pathways into higher education teaching/education qualifications
- VET qualifications and skill sets for educational support staff.

Training and Assessment Training Package (TAA04)

Through the annual VET Provider collection and the quarterly Apprentice and Trainee collection, NCVET compiles data on publicly funded training and fee-for-service VET provided by public institutions. This data has been accessed to provide information on the uptake and use of IBSA's Training Packages in publicly funded VET.

Significant amounts of training also occur outside of the publicly funded VET system. This includes:

- fee-for-service accredited training provided by private training providers, industry associations and other agencies
- in-house accredited training delivered by enterprise RTOs
- non-accredited training conducted in-house or by external providers.

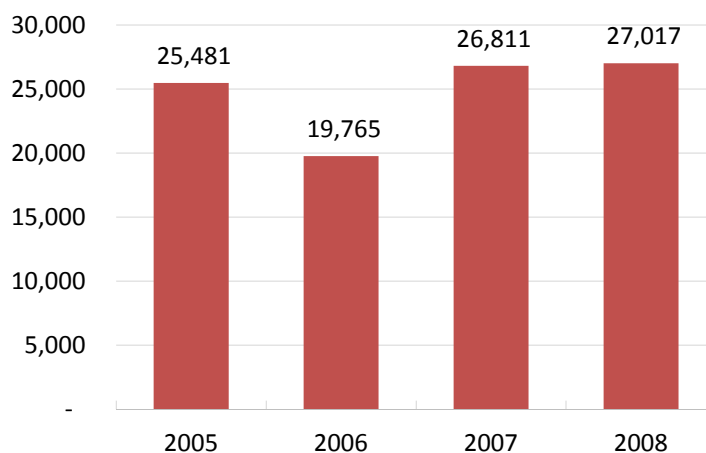
IBSA has gathered information on organisational approaches to training from employers through an online survey and industry consultations. While this information provides some insight into the nature of workforce development occurring in the Education industry, it does not enable the extent of VET that is not publicly funded or provided by public VET institutions to be quantified or estimated.

Take-up data is not yet available for the recently developed education and learning qualifications in the Business Services Training Package BSB07.

The 2008 NCVET data shows that the number of publicly funded participants in TAA, and its predecessor BSZ, qualifications has increased slowly since 2006.

Figure 5:

PARTICIPANTS IN TAA AND BSZ QUALIFICATIONS



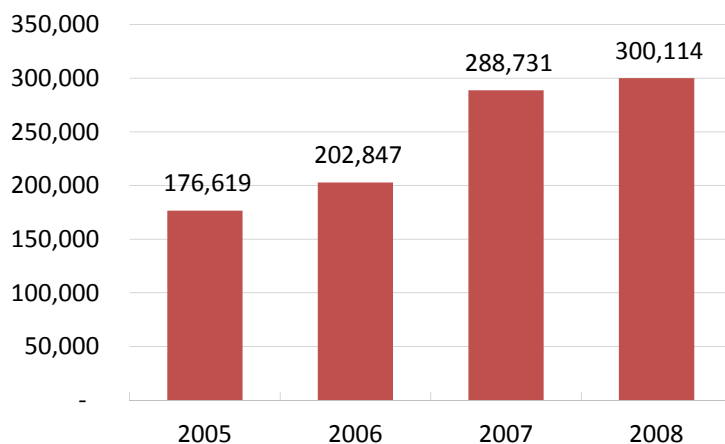
Source: NCVET VET Provider Collection 2008

Appendix 4 contains a table that identifies participant numbers for each TAA and BSZ qualification.

Enrolments in units of competency from the TAA and BSZ Training Packages have increased steadily since 2005 but may now be flattening out as shown in Figure 6.

Figure 6:

ENROLMENTS IN TAA AND BSZ UNITS



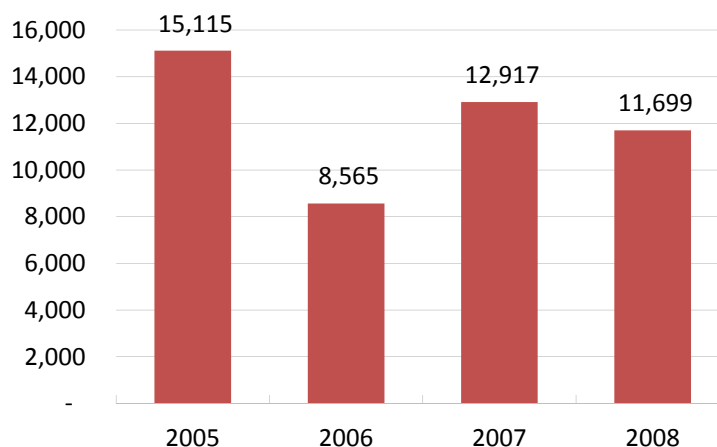
Source: NCVET VET Provider Collection 2008

Although NCVET data is generally understood to reflect publicly funded VET delivery the figures also capture fee-for-service delivery that occurs through public institutions. Across all of VET this amounts to approximately 20% of total delivery. However, in the case of TAA, 57% of all unit delivery recorded by NCVET has domestic fee-for-service funding.

NCVET records the reasons students give for undertaking study. Although for more than half of all students undertaking TAA units no reason is recorded, the data shows that for the remainder the primary reason for study is to get extra skills for their job. In 2008 a significant number of learners (10%) were undertaking TAA units because it was a requirement of their job. This result is significantly different from those reported for many other VET studies where the primary reason for study is 'to get a job'.

Figure 7 shows completions in TAA and BSZ qualifications between 2005 and 2008. Completions appear to have dropped in 2006 but this is due to the very high numbers of completions in 2005 following the implementation of the new Training Package. It should be noted that the 2008 data is not considered final. NCVET will revise the 2008 figure upward when the 2009 VET Provider Collection gathers more information on 2008 completions.

Figure 7:

TAA AND BSZ QUALIFICATIONS COMPLETED

Source: NCVER VET Provider Collection 2008

Appendix 4 contains a table that identifies qualification completions for TAA and BSZ qualifications.

NOTE: The NCVER approach to annual VET Provider Collection does not allow ready comparison between commencement and completion data; other than for apprenticeships and traineeships that come from a different collection. There is a time lag between participation in a qualification and completion of the qualification. More importantly, participant numbers are inflated because qualifications are generally completed over a number of years and the same student is counted in each calendar year they are enrolled. A very rough approximation may be achieved for individual qualifications by dividing the participant numbers in one year by the average course duration and comparing the result with the number of qualification completions in a later year.

For example, the Certificate IV in Training and Assessment TAA40104, and its predecessor BSZ40198, together recorded participation of 19,351 in 2006. Using an average duration of one year we would compare 19,351 to completions of 12,635 in 2007, resulting in a rough estimation completion rate of 65%.

NCVER data does allow completion rates to be examined for individual subjects or units of competency. In 2008 the results for TAA unit enrolments were:

Subject result	TAA units of competency	All VET subject enrolments
Assessed – pass	59.1%	68.1%
Assessed – fail	6.8%	6.6%
Withdrawn	5.4%	8.8%
RPL – granted	14.3%	4.1%
RPL – not granted	0.2%	0.1%
RCC – granted	0.4%	0.1%
RCC – not granted	0.0%	0.0%
Credit transfer	0.0%	0.0%
Continuing studies	13.2%	7.1%
Not assessed – completed	0.4%	4.9%
Not assessed – not completed	0.2%	0.3%

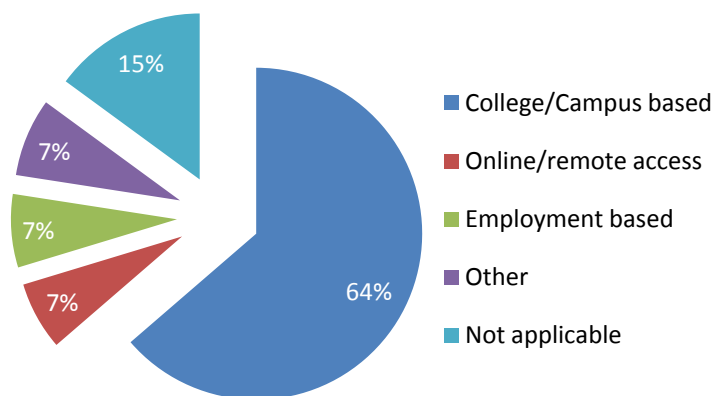
Source: NCVER VET Provider Collection 2008

The table above shows that while the rates of satisfactory completion for TAA units were similar to those for all VET subject enrolments, TAA units had a significantly higher proportion of successful RPL results.

NCVER data indicates that publicly funded delivery of TAA units was predominantly institute based in 2008, however a significant proportion of units in the Coordination, Management and Quality field were delivered through online/remote modes.

Figure 8:

MODE OF DELIVERY FOR TAA UNITS – 2008



Source: NCVER VET Provider Collection 2008

Employer views

Through an online survey and industry consultations IBSA gathered employers' views on training and workforce development. Details on the consultation methodology are contained in Appendix 3.

Of the Education industry respondents to the Escan survey:

- 74% said it was easy to provide on-the-job training
- 69% said that it was easy to get access to relevant training
- 69% said it was easy to upskill existing staff
- 36% said it was not easy to give staff 'time-off' to attend formal training.

Escan survey respondents reported on the type of training they provide for their staff. Of the Education industry respondents:

- 68% train staff using informal training
- 56% train staff using full accredited qualifications
- 41% train staff using units of competency
- 16% do not provide staff training

The most common type of informal staff training provided by Education industry survey respondents was company/industry orientation or induction training, provided by 88% of employers who provide informal training. Once off product or process training was provided by 74% of employers who provided staff training and 72% provided informal training for upgrading technical skills.

More than 60% of survey respondents reported that the current financial situation has resulted in a business plan to improve the skills of current staff, although 50% of respondents indicated that it had resulted in cuts to the formal training budget.

Education industry employers and industry representatives at IBSA's Escan consultation forums reported that:

- The Certificate IV in TAA is an entry-level qualification for the VET sector, good trainers should continue to develop skills from this point – it would be useful to have developmental/career pathways mapped out across VET and higher education and TAE10 may enable that in future.
- There is increasing uptake of the Certificate IV in TAA among secondary school teachers with the purpose of delivering VET in Schools programs.
- The casual contracted workforce does not have access to professional development, especially in the private sector. More face-to-face opportunities are needed, not more e-learning. In particular people in regional areas are isolated and don't have access to professional development.
- There are gaps in the qualifications available for people in the industry. Some roles/occupations that do not have an appropriate qualification or skill set available are: coaches/mentors conducting non-accredited training in the workplace; learning designers and instructional designers; supporters of Indigenous learning; teaching international students on- and off-shore; teaching individual with disabilities; e-learning co-ordinators.

Chapter 7

Challenges for workforce development

Major challenges for skilling and workforce development in the Education industry have been identified through industry consultations and employer responses to IBSA's online survey. Future challenges for the Education industry will be:

- regulatory and quality requirements
- the economy and global financial downturn/recovery
- the speed of technological change.

At the same time, the industry's ability to develop an appropriately skilled Education workforce will be impacted by:

- an ageing workforce
- access to suitable recruits, and
- shifts in VET policy.

Regulatory and quality requirements

All sectors of the Education industry are subject to regulations intended to safeguard the quality learning outcomes experienced by the end user. Whilst the intention is welcome, education providers in all sectors do sometimes feel burdened by regulatory requirements.

In the case of the VET sector, registered training organisations (RTOs) have reported to IBSA that complying with the requirements of the Australian Quality Training Framework 2007 (AQTF 2007) distract them from focussing on the needs of their learners. Enterprise RTOs have identified implementation of the AQTF 2007 quality indicators as the most significant current issue of concern¹⁴. The additional workload that compliance is seen to require undermines the commitment of enterprises to maintaining their RTO status.

Amended and strengthened auditing requirements under the AQTF were agreed in December 2009 in the wake of the adverse publicity for the quality of international education provision. The flow on effect of higher levels of public scrutiny will be felt by domestic and international providers alike. The creation of a single national regulator for VET, to commence in 2011, has been welcomed by many in the VET sector and promises to simplify registration and audit for RTOs operating nationally.

¹⁴ ERTOA, *Profiling the Australian enterprise RTO: Summary report*, October 2009

To ensure compliance with AQTF 2007 and navigate the shifting regulatory landscape, the VET sector workforce will need skills, knowledge and/or understanding in:

- quality assessment practices and RPL
- business planning¹⁵
- communications and customer relations¹⁶.

The economy and global financial downturn/recovery

Significant section of the Education industry are relatively protected from the impact the economic downturns – most notably the early childhood education and schools sectors, where economic stimulus spending is increasing levels of government funding. Revenue from international education has also continued to increase through the economic downturn, despite unfavourable exchange rates and equally unfavourable media attention.

Of the Education industry sectors, VET is possibly the most vulnerable to economic downturns as it relies on industry demand for skills in the workforce. Businesses affected by current economic conditions have cut training and workforce development budgets – even within the VET sector itself¹⁷. VET providers will need to be able to respond quickly to fluctuating levels of client demand, although 51% of Education industry respondents to IBSA's Escan survey reported that it is not easy to move quickly to adjust staff numbers and skills to suit business changes.

To operate successfully in the economic downturn the VET sector workforce will need skills, knowledge and/or understanding in:

- adaptability, including the ability to change approaches to training and assessment and stakeholder engagement in response to changing industry requirements
- supervision and leadership skills¹⁸ – to help organisations through periods of change – both innovative and reactive.

The speed of technological change

Coupled with the impact of the proposed National Broadband Network (NBN) rollout and increasing pressure for better approaches to developing young people's ICT skills, the Education industry is facing significant change in the near future – change for which the age profile of the industry leaves it largely unprepared. According to a recent IBSA paper¹⁹ the NBN will bring synchronous virtual classrooms, central learning repositories, high speed research computing, data visualisation, cross-campus collaboration, virtual laboratories and enhanced mobile learning. These developments will present significant challenges to most educational institutions.

¹⁵ 79% of Education industry respondents to IBSA's Escan survey identified a critical need for business planning – ranking it first on a list of 23 possible emerging or future skills.

¹⁶ 77% of Education industry respondents to IBSA's Escan survey identified a critical need for communications and customer relations – ranking it equal second on a list of 23 possible emerging or future skills.

¹⁷ 51% of Education industry respondents to IBSA's Escan survey reported that the current financial situation has resulted in cuts to the formal training budget.

¹⁸ 77% of Education industry respondents to IBSA's Escan survey identified a critical need for supervision and leadership – ranking it equal second on a list of 23 possible emerging or future skills.

¹⁹ Bowles, M., IBSA and the National Broadband Network rollout and Digital Economy, June 2009

As well as adopting technologies that support or enhance learning, VET sector educators are also faced with the challenge of keeping up with the rapidly changing needs of current and emerging industries.

New web-enabled mechanisms for interacting with customers, suppliers and stakeholders are reshaping business operations and consumer expectations. Technologies developed for social or entertainment purposes are increasingly adopted as business tools. Businesses in all industries feel the imperative of remaining alert to the potential of new technological developments.

To use technology effectively for educational purposes, the workforce for all sectors of the Education industry will need skills, knowledge and/or understanding in:

- creativity and design/innovation²⁰
- converging technologies – including combinations of business, IT and creative skills²¹
- advanced computer and IT skills²².

An ageing workforce

The Australian population is ageing and so all industries are being affected by changing age profiles in their workforce. However, the Education industry is feeling the impact more strongly than many industries due in part to a significant expansion in workforce numbers during the 1970s (many of whom are now approaching retirement) and low numbers of new workforce entrants throughout the 1990s.

An ageing workforce gives rise to particular workforce development issues that will have to be addressed in the Education industry. These include the need for:

- succession planning and knowledge management strategies to retain organisational knowledge as significant numbers of workers leave
- flexible career pathways that enable the retention of experienced staff on part-time and casual work arrangements – although the Education industry is already more flexible than many industries in relation to part-time and casual work beyond retirement age
- upskilling of older workforce to keep up with changing technology and new work practices.

To manage an ageing workforce the Education industry will need skills, knowledge and/or understanding of:

- business continuity planning²³
- knowledge management²⁴.

²⁰ 75% of Education industry respondents to IBSA's Escan survey identified a critical need for creativity and design/innovation capability – ranking it equal fourth on a list of 23 possible emerging or future skills.

²¹ 75% of Education industry respondents to IBSA's Escan survey identified a critical need for skills in converging technologies – ranking it equal fourth on a list of 23 possible emerging or future skills.

²² 74% of Education industry respondents to IBSA's Escan survey identified a critical need for advanced computer and IT skills – ranking it equal sixth on a list of 23 possible emerging or future skills.

²³ 74% of Education industry respondents to IBSA's Escan survey identified a critical need for business continuity planning – ranking it equal sixth on a list of 23 possible emerging or future skills.

²⁴ 73% of Education industry respondents to IBSA's Escan survey identified a critical need for knowledge management – ranking it eighth on a list of 23 possible emerging or future skills.

Access to suitable recruits

With a tight labour market and low unemployment in Australia over recent years it has been difficult for many industries to attract enough recruits – the Education industry has been no exception. The schools sector has seen a number of initiatives at state government level to attract people into the teaching field, including scholarships, allowances and fast-tracked qualifications and career paths.

In consultations with IBSA, Education industry representatives reported that it is difficult to attract recruits to the VET sector, particularly the trades areas. Two thirds of Education industry respondents to IBSA's Escan survey indicated that it is not easy to find applicants with the right mix and levels of skills.

Some employers believe that the level of casualisation and contract work has reduced employee loyalty because it is necessary to individuals to contract with more than one employer to get enough work. Substantial use of casual employment also limits employers' ability and/or willingness to invest in staff capability, thereby compounding the problem of less-than-ideally-skilled recruits.

The VET sector may benefit from emulating strategies used in the schools sector, and DEEWR is doing so in the case of language, literacy and numeracy (LLN) practitioners. To build the supply of LLN practitioners in the VET sector, DEEWR will fund scholarships in IBSA's new (yet to be endorsed) LLN Vocational Graduate Certificate and Vocational Graduate Diploma qualifications. If successful, it may be a model that could be used more broadly to encourage workforce expansion and development.

Public policy

As a largely government-funded industry, the Education industry is heavily impacted by public policy. All sectors are currently experiencing major change as a result of new public policy directions – particularly those originating from COAG.

Major policy initiatives currently impacting the Education industry include:

- Early Childhood Education and Care reforms – will mean that more carers with qualifications in early childhood education are needed in childcare centres
- Higher education reforms – will bring student-centred funding, performance-based funding, monitoring of academic standards, access and equity targets to higher education
- Digital Education Revolution – will require that new and continuing teachers have access to training in the use of ICT that enables them to enrich student learning
- Productivity Places Program – highlights and supports industry need for upskilling existing workers and increasing the skill level of Australia's working age population, requiring the VET workforce to respond directly to productivity needs of businesses, workers and the economy.

Good public policy is cognisant of the demands it will place on an industry during transition or implementation and will include strategies for appropriate workforce development. However, for public policy to be good it must be developed with relevant stakeholder input. All sectors within the Education workforce need to be engaged with public policy and play their part in the development and implementation of initiatives that will bring about the best outcomes for their industry.

Chapter 8

Future directions

The Education industry is crucial to the workforce capability of all other industries, but it also faces unique workforce development challenges of its own. With its responsibility for skilling the current workforce and preparing future generations for work and life, the Education industry is subject to intense public and political scrutiny and to frequent waves of policy change and review.

As the Industry Skills Council with responsibility for Education, as well as the increasingly related Business and ICT industries, IBSA has a key role to play in ensuring appropriate qualifications and skill sets are available for the Education workforce. Escan 2010 findings suggest that IBSA's future work involve:

- engaging with the non-VET sectors of the Education industry to consider the role that VET qualifications can play in the development of the broader Education workforce (especially in light of the Skills Australia discussion paper that regards teaching occupations of special importance in relation to taking a more direct approach to skills planning)
- considering the development of education technology qualifications appropriate for the needs of both the VET sector and the broader Education workforce
- expanding the range of available professional development products and workshops, including the opportunity for a professional development network.

The Escan process has also identified actions that could be taken by other VET system stakeholders to ensure that Australia's Education workforce is appropriately equipped for the future.

Industry/employers could support the development of the Education workforce by:

- valuing and investing in formal and informal opportunities for professional development including the provision of a range of support mechanisms, such as time-release, salary packaging, industry exchange
- developing transition/coaching programs to capture the knowledge and experience of exiting older workers
- identifying and promoting career pathways and development opportunities to attract new recruits into the industry.

Government could support the development of the Education workforce by:

- funding and supporting flexible professional development initiatives
- working with industry representatives to create clearer career pathways and better marketing of VET as a career for young people
- ensuring that infrastructure and skills development are available to allow the integration of technology into teaching and learning.

Appendix 1

Education Occupation in Demand

This list reflects reporting from IBSA's Escan 2010 industry consultation and validation forums and survey.

ANZSCO	Occupation/Job Role	Training Package Qualification	
EDUCATION AND TRAINING			
422116	Education/Teachers' Aide	(TP qualification available through Community Services and Health Industry Skills Council)	
272111	Career Counsellor/ Adviser	(No applicable TP qualification, higher education qualification used)	
242211	Professional – Language Literacy and Numeracy	The following two qualifications will be going to the NQC for endorsement in March 2010: <ul style="list-style-type: none"> • Vocational Graduate Cert in Adult Language Literacy and Numeracy Practice • Vocational Graduate Diploma of Adult Language Literacy and Numeracy Leadership 	
242211	Professional – VET Curriculum Designer/ Adviser	TAA50104	Diploma of Training and Assessment
242211	Professional – Training and Development (Non-school VET)	TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment
2493	Teacher of English to Speakers of Other Languages	(No applicable TP qualification, VET accredited and higher education qualifications used)	
242211	Teachers – Schools – ICT Learning	TAA40104	Cert IV in Training and Assessment
242211	Teachers – Schools – VET	TAA40104	Cert IV in Training and Assessment
242211	Teacher – VET (Non-school)	TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment
223311	Training and Development Professional	TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment
132311/ 223311	Training Centre Manager	BSB51107	Diploma of Management
		TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment
242211	Trade Trainer	TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment

ANZSCO	Occupation/Job Role	Training Package Qualification	
242211	Vocational Education Teacher	TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment
242211	Workplace/VET Trainer/Assessor	TAA40104	Cert IV in Training and Assessment
		TAA50104	Diploma of Training and Assessment

Source: Escan 2010 survey and stakeholder input provided during validation stage

Appendix 2

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- Skills Australia, *Workforce Futures* discussion paper and accompanying background papers, October 2009
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Appendix 3

Methodology and stakeholder input

Statistical information for this report was gathered through a desktop research process from a range of sources as indicated in the reference list.

Input into this sector report was gathered from industry stakeholders via a consultation forum on 8 October 2009.

An online industry survey was conducted in November 2009. The 113 responses included coverage of all sectors within the Education industry, although the vast majority of respondents were from the VET sector. Responding organisations operated in all Australian states and territories and in capital cities, regional centres, country towns and rural locations.

The draft report was validated by IBSA's Education Sector Advisory Committee at a meeting on 1 December 2009.

Stakeholder input

The following organisations have made valuable contributions to this Escan report:

Aboriginal Centre for the Performing Arts	L1000 Pty Ltd
Academy of Career Training	Lifetimes & Milestones
Access Community Group	Marriott Support Services
Aspire Performance Training	Meadow Heights Learning Shop Inc
Australian Council for Private Education and Training	MineSkill Australia ALS Laboratory Services Group
Australian Indigenous Leadership Centre	Mint Training
Australian Institute of Management (SA) Inc	Mornington Community Contact Inc
Australian Taxation Office	National Pharmacies
Australian Training and Consulting	Pivot Solutions Pty Ltd
Aveling	Radio Adelaide Training
Bayley & Associates	R-Col Training & Assessment Service Pty Ltd
Box Hill Institute of TAFE	Relationships Australia SA
Business Training Needs Solutions	Royal Australian Navy RTO
CGU Insurance	RTW Solutions
Canberra Institute of Technology	Safecity Training Academy
Carson Australasia Pty Ltd	Sempcom Petroleum Transport Training Pty Ltd
Clarke Creative Training Consultants	SSI Australia
Coffs Coast Community College	TAFE Development Centre
Continuing Education Bendigo Ltd	TAFE NSW Hunter Institute
Cornzal	TAFE NSW Sydney Institute
Customer Focus Group Training	TAFE SA Adelaide South Institute
D/T Education	TAFE SA Regional
Dittman Consulting Australia Pty Ltd	Taree Community College
Enterprise Registered Training Organisation Australia	The Management Edge Pty Ltd
Flexible Training Solutions	Training, Innovation – Management & Enterprise Pty Ltd
Focus on Training	Victoria University
Frontier Training & Technology Pty Ltd	Wisdom Learning
Fusion Business Solutions	Workplace Learning Initiatives Pty Ltd
Gientzotis Consulting (Australia) Pty Ltd	Work Skills
Holmesglen Institute of TAFE	Zieland Australia Pty Ltd
Jenard Training and Personnel	

Appendix 4

NCVER data

The NCVER approach to annual VET Provider Collection does not allow ready comparison between commencement and completion data; other than for apprenticeships and traineeships that come from a different collection. See page 11 for more detail.

TABLE 1: PARTICIPATION IN TAA AND BSZ QUALIFICATIONS, 2005-2008

Year	2005	2006	2007	2008	Total
TAA40104 – Certificate IV in Training and Assessment	2,803	16,997	26,255	26,289	72,344
BSZ40198 – Certificate IV in Assessment and Workplace Training	22,111	2,354	53	2	24,520
TAA50104 – Diploma of Training and Assessment	81	299	499	726	1,605
BSZ50198 – Diploma of Training and Assessment Systems	486	115	4	0	605
Total	25,481	19,765	26,811	27,017	99,074

Source: NCVER VET Provider Collection 2008

TABLE 2: TAA AND BSZ QUALIFICATION COMPLETIONS, 2005-2008

Year	2005	2006	2007	2008	Total
TAA40104 – Certificate IV in Training and Assessment	1,192	6,811	12,520	11,473	31,996
BSZ40198 – Certificate IV in Assessment and Workplace Training	13,692	1,593	115	12	15,412
TAA50104 – Diploma of Training and Assessment	22	103	273	213	611
BSZ50198 – Diploma of Training and Assessment Systems	209	58	9	1	277
Total	15,115	8,565	12,917	11,699	48,296

Source: NCVER VET Provider Collection 2008

