



Primary Extended Project Award (PEPA)

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Aoife Hassett is a research catalyst at The Centre for Education and Youth. She has over ten years’ experience as a primary class teacher, both in the UK and internationally, and holds a Master’s in Education Policy from the Institute of Education. Aoife’s professional and academic history has equipped her with in-depth working knowledge of child development, curriculum, assessment practices and educational infrastructures. Having led PSHE, and overseen the introduction of the new Relationship and Sex Education Guidance 2022, Aoife has a particular interest in the development of social and emotional skills in children and young



people. Aoife's research to date has had a social justice theme, focusing on equitable outcomes for students, particularly those from disadvantaged groups.

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Foreword

In September 2022, [the Centre for Education and Youth](#), in partnership with multi-academy trust [Big Education](#), were awarded funding from awarding organisation [NCFE's](#) Assessment Innovation Fund to design a new assessment for ten- and eleven-year-olds: the Primary Extended Project Award (PEPA).

This report summarises our progress in designing the PEPA, describes our suggested model, and outlines our proposed prototyping and piloting process. Subject to further investment, we aim to start building the prototype from April 2023, with at least thirty schools and one thousand ten-year-olds beginning their pilot PEPA journey in Autumn 2023 and completing the award in Summer 2025.

We would like to thank NCFE, and in particular Assessment Innovation Manager Gray Mytton, for their trust and support. We would also like to thank the schools involved in the design process for their active, enthusiastic participation, including Kings Cross Academy for hosting our workshops, and the young people and teaching staff who gave feedback to inform our work. Finally, we would like to thank Rosie Clayton from the Rethinking Assessment, and Gemma Moss from the UCL Institute of Education and Director of the ESRC Education Research Programme, for their advice and guidance.



1 Why do we need a Primary Extended Project Award (PEPA)?

The concept of the Primary Extended Project Award (PEPA) aims to contribute to addressing three problems in the way that primary pupils are currently assessed:

- **Overemphasis on summative assessment directly linked to school performance measures, leading to:**
 - **teaching to the test, at the expense of other learning opportunities;**
 - **increased stress for teachers, pupils, and families.**
- **A strong focus on literacy and numeracy, which limits pupils' opportunities to develop wider dispositions, undertake in-depth learning, and identify and pursue individual talents and passions.**
- **Limited opportunities for school to collaborate and offer pupils opportunities to develop based on feedback from outside their classrooms.**

1.1 Overemphasis on summative assessment

The 2021 paper '[High standards, not high stakes](#)' from the British Educational Research Association recognises primary pupils are "tested and assessed in every year except years 3 and 5" (Moss et al., 2021, p. 7). Recent introductions of Reception baseline assessment, a Year One phonics check, and Year Four multiplication check have increased the summative assessment burden on primary schools, resulting in a culture of testing where non-statutory assessments take place in every year group.

In their report '[Making Progress: The Future of Assessment and Accountability in Primary Schools](#)', Richmond and Regan (2021) raise concerns that pupils are drilled on the exam content and techniques, highlighting that in four months of the final year of primary, some teachers are spending nearly half their teaching time preparing pupils for Key Stage 2 tests. The [BBC Newsround 2016 STATS poll](#) found that 57 per cent of pupils said they felt "nervous" about the tests.

In contrast, the PEPA will provide pupils with a lower stakes opportunity to demonstrate their knowledge and skills. Pupils will be encouraged to take ownership over their learning, in a departure from the current 'top-down' approach to test preparation.

1.2 Focus on literacy and numeracy

The [Education Select Committee in 2017](#) highlighted that SATs were narrowing the curriculum, with non-tested subjects at risk of being neglected in favour of test preparation. Evidence from Ofsted indicated that, per class, "around two thirds of schools spent only one to two hours per week teaching science, and around a fifth spent less than one hour" (Education Committee, 2017).



In response, Moss et al. (2021) call for “new assessment instruments” that go “beyond literacy and numeracy tests” (Moss et al., 2021, p. 5). There is a need to balance these assessments with an opportunity for all primary pupils to gain in-depth understanding of other subjects, and hone a wider skillset, to prepare for their learning journey. The PEPA is designed to meet this need and allow pupils to investigate topics and develop skills that are currently neglected due to intensive test preparation.

1.3 Collaboration across and beyond schools

Moss et al. (2021) stress the need to “find new ways of altering existing structures and processes to better support collaborative school improvement” (Moss et al., 2021, p.17). In [research commissioned by the National Union of Teachers](#), Hutchings (2015) argues that “collaboration should be encouraged”, through a renewed focus on a broad curriculum that fosters creativity (Hutchings, 2015, p.7). By building a network of young people, teachers, parents, and professionals who are involved in delivering, providing feedback on, and celebrating the work of primary school pupils, the PEPA will promote collaboration and community, rather than placing schools in competition.

1.4 The case for innovation now

As part of the educational recovery from COVID-19, there are a number of factors which make the development of a PEPA a timely addition to the assessment landscape.

While the Education Endowment Foundation’s analysis of [‘Best evidence on impact of Covid-19 on pupil attainment’](#) highlights that research has focused on literacy and numeracy, there is evidence that the wider curriculum has suffered during the last two years. [Canovan & Fallon \(2021\)](#) found the curriculum was narrower than normal, and an Ofsted [COVID-19 briefing on schools](#) reported that many schools covered non-core subjects in less depth. The [Levelling Up the United Kingdom](#) White Paper also set the target for 90% of Key Stage 2 pupils to reach the expected standards in reading, writing and mathematics by 2030, and for the proportion meeting the expected standard in the “worst performing areas” to improve by a third. This 90% target was reiterated in the March 2022 schools white paper, [Opportunity for all: strong schools with great teachers for your child](#). Whilst there is a need for pupils to catch up in literacy and numeracy, this goal increases the risk of more narrowing and shallowing of the curriculum.

In the 2022 report [‘Assessment for Children’s Learning: A new future for primary education’](#), The Independent Commission on Assessment in Primary Education (ICAPE) argues that England’s policies and practices for assessment of children in primary schools are “urgently in need of improvement” (Wyse et al., 2022, p. 4). The report outlines a series of principles to underpin primary school assessment and makes recommendations deemed necessary to improve children’s learning and life chances. The principles propose that primary school assessments must be:

- focused on improving pupils’ learning and progress;
- clearly separated from the means to hold schools and teachers to account;
- designed to support inclusive education for all children and provide a holistic picture of pupils’ achievements.



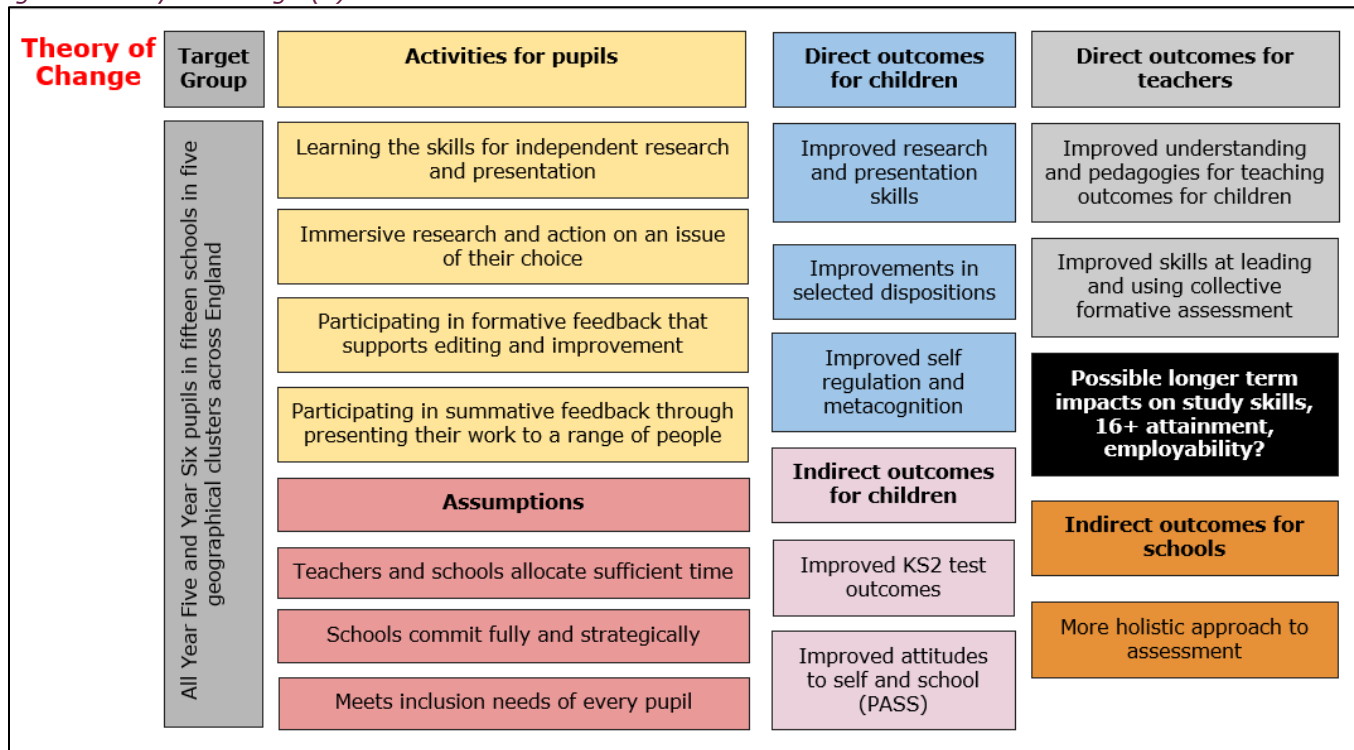
They also suggest that formative assessment of children’s learning should be the main emphasis of the assessment system. The recommendations include assessment of each pupil’s learning that is captured in a profile of evidence, reflecting their achievements, and drawing on a variety of assessment methods. These principles and recommendations are strongly aligned with the goals of the PEPA, as an innovative approach aimed at tackling the current issues in primary assessment outlined above.

2 Our vision for the PEPA

Our original vision was “to create a rigorous, flexible and scalable assessment instrument¹ for eleven-year-olds that any primary school across the UK (and possibly beyond) could use to support the development and recognition of a wide set of learning dispositions that extend beyond what the national curriculum and SATs currently value”.

We summarised our intended impact on pupils and teachers in the Theory of Change below.

Image 1: Theory of Change (1)



In addition, our vision was for the PEPA to contribute to systemic change, mobilising knowledge from the pilot in three ways. First, by engaging a wider community of primary practitioners and school leaders to prime them for involvement with any future scaling. Second, by involving key policymakers and system leaders with influence over primary schools throughout the process. Third, by communicating with a community of parents, pupils and the wider public.

¹ Not a qualification.

Image 2: PEPA mission statement

Our primary school leavers will be recognised as creative change-makers through:

An extended project for Year 5 and 6 pupils based on addressing real-world challenges, which they shape themselves and present through a variety of media.

An assessed award where pupils receive meaningful, formative feedback from a wide variety of people, in and outside of their school and community.

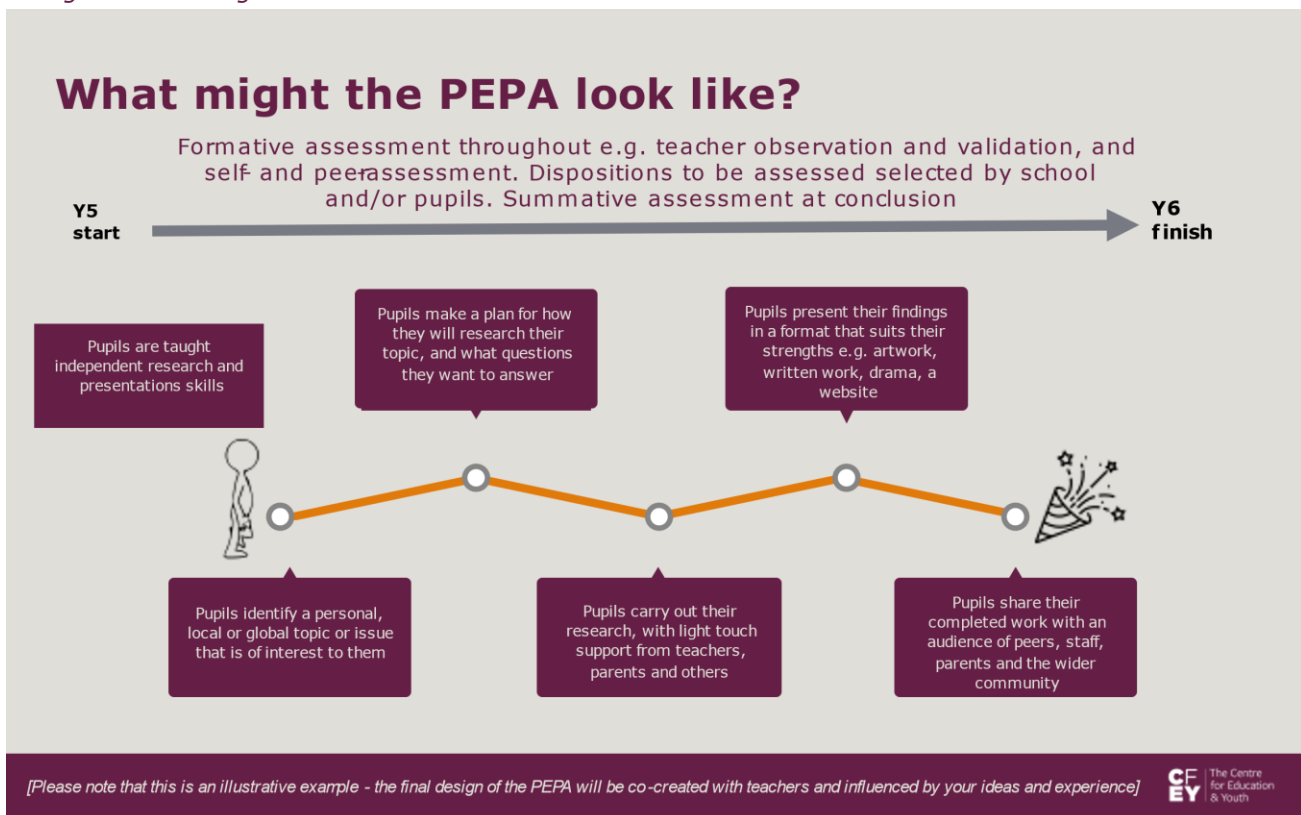
A teaching programme with a clear but adaptable set of principles.

A network of schools, people (including older young people, such as secondary school pupils) and organisations who can work in sustained ways to support, challenge, assess and celebrate these projects and their creators, as well as upskilling other schools to adopt similar processes.

A festival where, for one week a year, the whole country and world can see and celebrate what our eleven-year-olds are capable of.

During our initial conversations with interested schools, leaders asked for a more precise picture of what the PEPA might look like for schools and pupils. In response, we prepared the slide below.

Image 3: What might the PEPA look like?





Whilst we aimed to initiate a design process that was responsive to and (to some extent) driven by schools' views, we also created five non-negotiable principles for the PEPA:

- NOT an alternative to SATs - **complementary**
- NOT (just) for post-SATs time - **embedded**
- NOT only for the academically able - **inclusive**
- NOT achieved (only) through standard subject-based lessons - **additional**
- NOT taught or assessed by teachers alone - **connected**

We knew that these principles might make schools think twice about participation in either the design or pilot. However, we wanted to be clear that our design process would happen within the boundaries of these principles.

3 Summary of our design process

3.1 Practice review

A practice review is a detailed examination of current practices in education. We chose to begin our design process with a practice review in order to assess the landscape of current assessment practices with similar principles or goals. This allowed us to both understand gaps in provision, and also identify effective practice that we could learn or draw from in our design.

Our practice review comprised three parts. We began by conducting an extensive search of current, innovative assessment practices. All examples included go beyond the statutory expectations of knowledge assessment (e.g. SATs) to a more holistic assessment of skills and dispositions, such as collaboration and self-regulation.

We used this search to compile a longlist of examples both within the UK and internationally. We then focused on eight examples where self-directed project work was a key feature, providing an in-depth case study of each. We used the research questions below to guide our search.

Research questions

The review has been guided by three research questions:

- What opportunities do pupils currently have in English primary schools to develop learning dispositions (including metacognition and independent research skills) that go beyond those valued by the National Curriculum and SATs?
- What existing examples are there of extended research projects for primary-aged young people across the world and how have these worked?
- What kinds of formative and summative feedback do primary-aged pupils receive on their schoolwork beyond SATs and subject-focussed assessment, and how do they act on it?

3.1.1 The longlist

Our practice review included a longlist of 20 examples of project-based assessment tools, which focus on measuring the development of learning dispositions. We provided a brief analysis of their strengths and weaknesses, drawing on academic studies where appropriate.

There were a range of common themes across the longlist examples in the review that were useful to consider in the design of the PEPA. These fell into five categories: learning approaches, content, skills and dispositions, assessment methods, and challenges.

We found that learning approaches commonly include:

- a focus on 'how' rather than 'what' students learn;
- student ownership and responsibility for planning, designing and implementing their projects;
- an inclusive approach that incorporates all students, meets them 'where they are at' in their learning journey, and encourages them to support each other;
- a focus on preparing students for lifelong learning;
- use of technology;
- parents' understanding of and involvement in their children's learning.

Content commonly includes:

- a focus on students' interests and passions;
- project-based tasks that include 'hands on' activities as well as written work;
- activities grounded in real-world issues that promote sociocultural awareness and understanding;
- an interdisciplinary approach that spans a range of subjects;
- an investigative, exploratory approach that encourages the development of research skills;
- the opportunity to take action on the issues studied.

Skills and dispositions that are developed and assessed often include:

- creativity;
- independent learning and autonomy;
- social skills including communication;
- life skills including flexibility and goal setting;
- critical thinking and questioning;
- problem solving;
- self-regulation;
- collaboration and teamwork.

Assessment methods are often formative, including:

- student involvement in co-creating assessment methods and tools;
- students' reflection on their learning critically over time;
- students keeping a record of their learning, achievements, and challenges that they can carry through the education journey;
- self-assessment;
- observations of student work;
- the use on online forums to discuss learning and outcomes;
- a final presentation or exhibition of work, involving other young people and/or the wider community.

Finally, key challenges to work around include:

- a need for teachers to have access to training, guidance, and resources to effectively support students to carry out open-ended research or investigative projects (such as scaffolding or rubrics);



- a need to take into account the possibility of teacher bias when conducting formative assessment, such as observations of student work.

3.1.2 The case studies

Our practice review also included eight case studies, which provided in-depth analysis and synthesis of the most dynamic and relevant examples of practice identified. For each, we gave an overview, providing some contextual information; identified which skills and dispositions were being assessed, the kinds of activities students engage in and the types of assessment methods and strategies being used; and provided a summary of what we could learn.

The case studies included:

- The South Australian Certificate for Education (SACE) - Research Project (16 - 18 years)
- Bedales Assessed Courses (BACs) - (14 - 16 years)
- SAILS Inquiry and Assessment Units (SAILS) - (11 - 19 years)
- Continuous Provision (CP) - (3 - 7 years)
- International Baccalaureate Primary Years Programme (PYP)
- King Alfred School (KAS) 6-8 Curriculum
- Extended Project Qualification (EPQ)
- Assessing Self-Directed Active Learning in Primary Schools

These case studies contained a number of features that were useful in informing the design of the PEPA. While the case studies provided further examples of the types of good practice identified in the longlist, they also offered additional models for learning and assessment that were helpful to draw on.

3.2 School recruitment

We set out to recruit up to twenty school or multi-academy trust leaders (such as headteachers and curriculum or assessment leads) and teachers to take part in our workshops. We created a flyer with details of the project and the commitment required, and a simple expression of interest google form. These were shared across the CfEY and Big Education networks. In response to sharing this information, we received sign-ups from 17 school leaders from 17 different schools. We set up two online onboarding meetings on the 28th of September and 6th of October and invited these school leaders to attend, alongside any other staff they wanted to involve. These meetings served as a space to explain our vision and plans in more detail and answer any questions from attendees.

Image 4: PEPA flyer for schools

The flyer is titled 'Valuing a wider range of skills and dispositions THE PRIMARY EXTENDED PROJECT AWARD (PEPA)'. It features the CFEY logo and a call to action: 'PLEASE REGISTER YOUR INTEREST HERE BY MONDAY 25 JULY'. The text describes the project's goal to develop a new assessment tool for primary schools. It includes a section 'WHAT WILL PARTICIPATION INVOLVE?' with two bullet points: 'Ratifying at least one senior leader and one Y6/5 teacher from your school or school group to participate in two in-person workshops in London on Friday 14 October and Friday 25 November 2022, both from 10:00am to 4pm. Unfortunately, we have no budget for cover or travel costs.' and 'About five hours of additional in-school work, mainly to consult with staff and pupils during the Autumn Term.' A final note states: 'SCHOOL AND MAT LEADERS CAN EXPRESS AN INTEREST IN PARTICIPATING HERE BY MONDAY 25 JULY. It should take 5 minutes to complete. Please note that there are a limited number of places available, and we cannot guarantee that everyone who expresses an interest will be able to join the project. We really look forward to hearing from you. If you have any questions, please contact silvia@cfey.org.'

Following these preliminary conversations, seven schools committed to taking part in the design process. These schools signed a Memorandum of Understanding, which set out the requirements of taking part. Five of the schools attending the workshops released two members of staff to take part in the workshops, generally one school leader and one classroom teacher. One school sent three members of staff and the remaining school sent one member of staff who was both a Year 6 and Key Stage 2 Phase Leader. This school also provided the venue for the workshops.

The majority of the schools that had expressed interest but were unable to commit to involvement in the design process said they were still interested in the project and would like to be contacted again in the future, about potential involvement in the piloting stage.

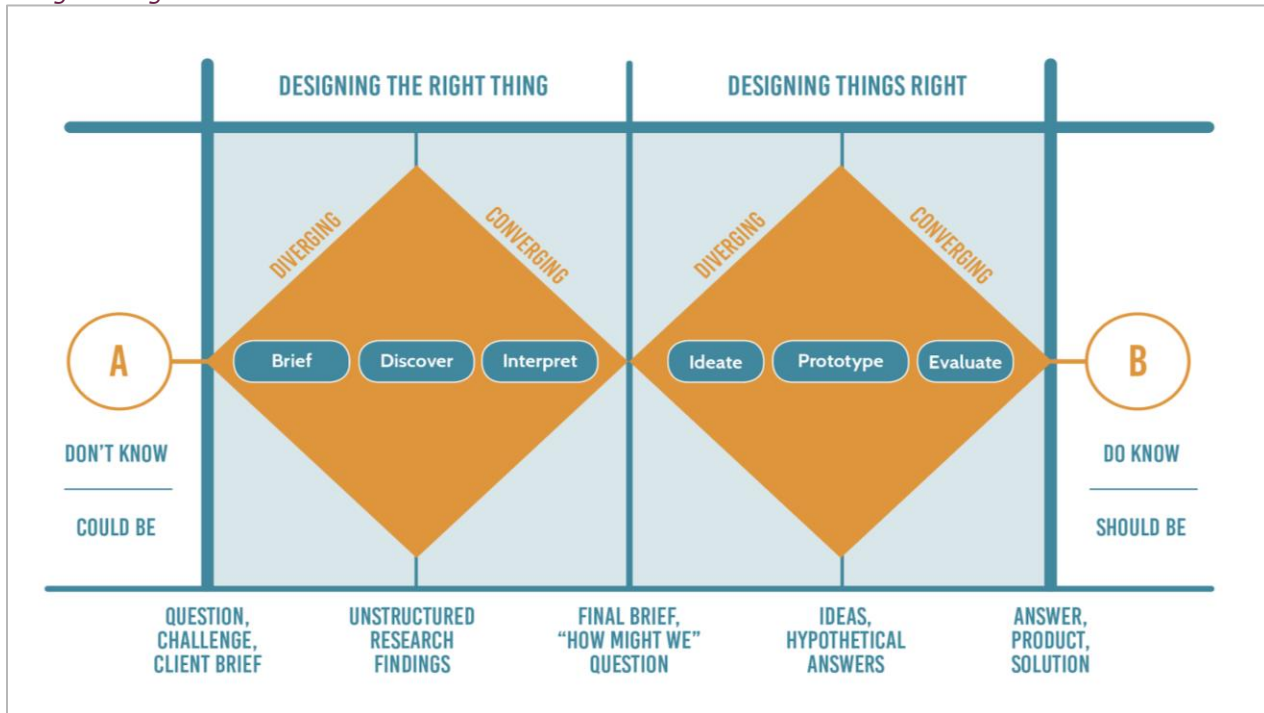
3.3 Design process

3.3.1 How we designed and delivered our workshops

We worked with two teachers from each of the participating schools to design and frame the PEPA. We took a participatory approach to the 'Define Stage' activities, working alongside practitioners in the research process to co-create a plan for the pilot. This work intended to be adaptive and iterative, ensuring that new materials were created in dialogue with practitioners to generate buy-in for the work.

In working with school leaders and teachers we used Big Education's iteration of the 'double diamond' methodology to gain a strong and shared understanding of the project aims, share ideas and co-develop strategies, and assess and tackle potential risks. The 'double diamond' methodology builds on design thinking principles, providing a tool to enable teachers to think creatively in response to the brief via a process of divergent and convergent thinking. First, full exploration of the challenges of primary assessment were debated in the context of possible approaches that emerged from the practice review (divergent thinking). Teachers then worked collaboratively to refine and identify the best of these ideas ready for prototyping (convergent thinking) before working creatively to design the tool which would be prototyped (divergent thinking). Finally, they evaluated the tool, sought evidence of its successes, and decided what needed to be rethought (convergent thinking).

Image 5: Big Education's Double Diamond



3.3.2 Workshop One

In the first workshop, we asked teachers to articulate the problem as they saw it, in order to connect them to the purpose of the PEPA. They discussed their hopes and concerns in relation to the project, as well as the assessment experiences and expertise of their own schools which might contribute to the development of the PEPA. We shared our Theory of Change with them, explained the design thinking process, and made clear our knowns and unknowns as project leaders.

As all teachers had been sent some case-studies as pre-reading, the first section of the day involved teachers exploring the case studies from the practice review together. Teachers identified practices which resonated with their own experiences, and discussed which ideas could be useful to the PEPA, and the practical implications of each model. This process ensured that we were building on existing knowledge and expertise.

The group then established their agreed design principles. The design principles provided the bedrock of the next task, in which teachers shaped a mock-up of the PEPA Project Record, an online record for pupils to use to record their ongoing work on the PEPA. For inspiration, we also shared a series of examples of existing 'Digital Portfolios' created by One Planet, Rethinking Assessment, Golftyn Primary School in Connah's Quay, Wales, and Surrey Square Primary School in London. Teachers were encouraged to consider the information that pupils would need to record, how it could be used as a personal reflective

tool, how others could provide feedback through the record, and how different features of the record could be laid out in an accessible way.

Image 6: Golftyn Primary School's Digital Portfolio



Image 7: One Planet's Digital Portfolio

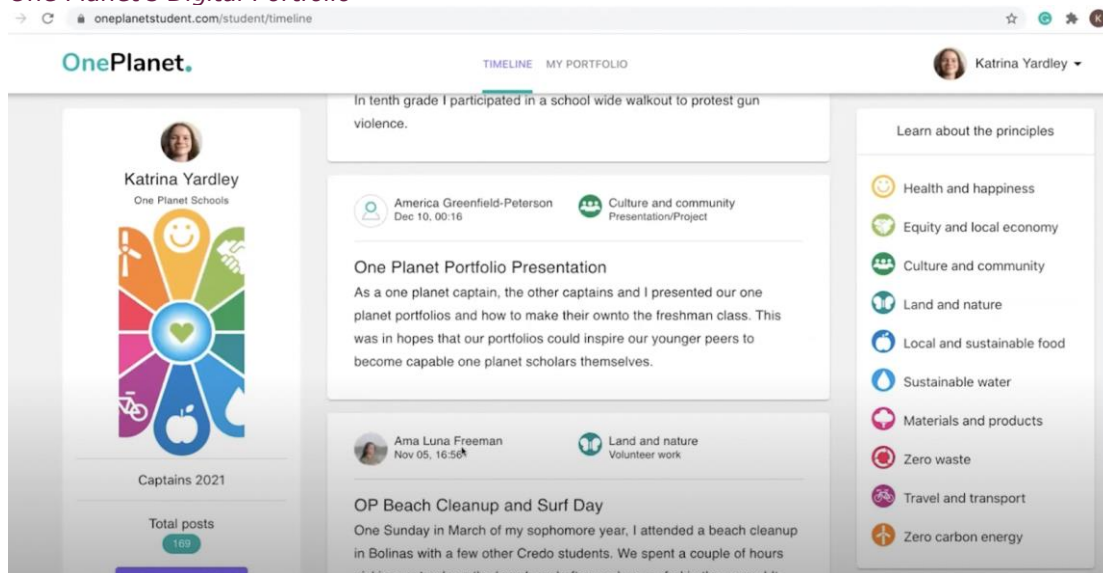


Image 8: Rethinking Assessment's Digital Portfolio

Draft Rethinking Assessment Learner Profile

Harriet Smith

I am a Year 13 student who has a passion for science and is looking to study engineering at university...

[My Portfolio](#)

My Interests

- Science
- Photography
- Digital
- Running
- Psychology
- Nature

THE 3Cs OF SUCCESS

ME AS A LEARNER

What are my strengths?

I like to play with things - to break them down and build them up. Whether that's ideas or physical things. So I like taking apart mobile phones and seeing how they work. I think my real strength is being able to see the detail and how it links to the big picture.

What do I want to change about my community / the world?

Girls in my area have very little sport they can do. There are plenty of sports aimed at boys but far less for girls. In the last five months I have got together with my friends to campaign for change and to make the case to the local council.

What do I need to work on?

I find it hard sometimes to work in a team. I am so keen to get on with things I get frustrated with those who want to slow things down. So I am working hard and making sure everyone including me has a defined role that they can get on with.

What motivates me?

My younger brother has learning difficulties and from a young age I've supported him. I can see how he struggles and that he is not always understood. This has given me a passion for doing something meaningful in my life that helps others overcome difficulties.

BUILDING BLOCKS

- Literacy
- Numeracy
- Digital Skills
- Oracy

COURSES

MAJOR COURSES

- Biology
- Physics
- Design

MINOR COURSES

- French
- Coding

APPLIED COURSES

- Cooking
- Football coaching
- Real world project at advertising company

INTERDISCIPLINARY COURSES

- Climate change
- Migration

PERSONAL PROJECT

My Extended Project Qualification (EPQ) was to build a drone that could deliver medicines to those who need emergency supplies.

[Read more](#)

TESTIMONIALS

"Harriet did a real world learning placement with us for 6 months and showed what a great problem solver she is. She was so skilled at breaking down a project into the parts that really mattered and working systematically through them to achieve a high quality outcome."

Jenny Tibor, head of product development

MY BEAUTIFUL WORK

MY ACHIEVEMENTS

- Duke of Edinburgh Bronze
- Lamda Drama Award
- Church Youth Leader

Workshop attendees presented their finished designs to the rest of the group.

Finally, the group discussed what baseline data should be collected. They felt it important to collect feedback from teachers, pupils, and senior leaders. Questions were drafted for each of these groups so that simple surveys and interviews could be carried out between workshops one and two.

3.3.3 Between workshops

Following workshop one the project leaders created data collection materials to be used by teachers in their own schools, including:

- an overview presentation to explain the PEPA to teachers and senior leaders;
- surveys for teachers and senior leaders;
- an interview framework for pupils.

All teachers made a plan to collect data before the second workshop.



Project leaders also created a prototype digital PEPA Project Record, which synthesised teachers' ideas from the workshop (see Section 4.8, page 34, for more detail).

3.3.4 Workshop Two

In the second workshop, the project leaders presented an analysis of the baseline data teachers had collected from teachers, senior leaders, and pupils. Teachers discussed these findings and their implications for the PEPA.

Returning to the Theory of Change and taking the feedback data into account, teachers then worked in small groups on the assessment framework for the project, considering the three direct outcomes for pupils:

- improved research and presentation skills;
- improvements in selected dispositions;
- improved self-regulation and metacognition.

Teachers sought to identify the skills and dispositions they felt would be important to assess through the PEPA and decide how each might best be assessed, when assessment should happen and who should be involved in the assessment process.

Teachers then reviewed the prototype PEPA Project Record to ensure that it aligned with their views on the assessment process and the stakeholder feedback. They spent time considering the curriculum that would underpin the PEPA and planning a teaching sequence that spanned Year 5 and Year 6. They then considered whether the PEPA necessitated specific pedagogies in order for it to be taught successfully. Finally, they considered their proposals through the eyes of a pupil in their own class: how might this pupil experience the process and where would the challenges lie? This led teachers through an iterative thinking process, enabling them to refine their thinking at each stage and collaboratively problem-solve around challenges.

Finally the group reviewed the stakeholder feedback. They considered how the PEPA might be received by teachers and what teachers' professional development needs might be, should they begin to teach it.

This session gave the project leaders sufficient material to design the assessment criteria and process, the curriculum, the Project Record, the teacher guidance and related professional development programme, ready for use in the next phase of the project.

3.4 What do teachers want?

During workshop one we invited teachers to outline what they wanted from the PEPA. The teachers also gathered further feedback from colleagues and pupils between the workshops, which was discussed in workshop two. This helped us to identify a number of important guiding principles, as well as practical requirements for PEPAs effective implementation.

In workshop one teachers highlighted the desire for:



- a holistic and rigorous assessment that values, showcases, and celebrates a range of achievements and skills - beyond right/wrong testing of reading, writing and maths;
- a purposeful and meaningful assessment that supports broader understanding built over time and provides pupils with the dynamism required to navigate an uncertain future;
- an embedded assessment that does not replicate existing work, but has full buy-in from teachers, leaders and parents;
- an assessment with a positive impact on all young people, by empowering them to drive their own learning or helping to build their self-esteem, for example;
- tangible takeaways and outcomes for all pupils, such as an award recognising their achievements in a variety of areas;
- a clear structure, criteria and protocol for assessment of all the different outcomes children could potentially produce;
- a consistent pedagogical approach shared by schools and teachers involved (but with some room for creativity), including a common language and understanding of the expectations, clear guidance on pre-teaching of skills, and example of good practice;
- the chance to share strategies and learnings with other teachers and schools.

Teachers from Welsh schools wanted the project to have the potential to be linked to the four core purposes of the new curriculum for Wales, namely, to be ambitious, enterprising, ethical, and healthy.

Teachers also discussed the value of introducing 'expert mentors' to the PEPA, drawing on inspiration from the Practice Review case studies and the project leaders' conception of how the PEPA might look. Teachers saw value in the idea of having input from external experts who could share specialist information with pupils and further inspire their interest in their chosen topic, as well as providing another source of formative feedback. These expert mentors could be drawn from, for example, parents or relatives of other pupils in the school or MAT, local business leaders, or volunteers from the third sector. Expert mentors would need to be matched to a child or group of children based on chosen PEPA themes, in order to provide support and guidance throughout the project. They would also need to be compliant with high standards of good safeguarding practice.

In workshop two we reviewed the feedback on the PEPA concept gathered by teachers from other school leaders, teachers, and pupils at their schools. This data showed that all school leaders providing feedback (13 in total) felt the PEPA would be beneficial for pupils. The majority felt the PEPA should begin in Year 5 with a 'mini PEPA'. Just under two thirds said they would 'possibly' be prepared to reduce curriculum time to support the implementation of the PEPA, while just over one third said they 'definitely' would. The school leaders also identified creativity, research, and resilience as particularly important dispositions for developing lifelong learning.

Image 9: School leader responses to the question: 'Are there specific dispositions that you feel are important for lifelong learning?'



Feedback from teachers (13 in total) showed that they were particularly interested in pupils developing presentation skills, research skills and independence through the PEPA. They felt that research skills especially would require pre-teaching before beginning the project, followed by presentation skills. In order to effectively deliver the PEPA, teachers felt they would need time outside of the curriculum or school timetable, training, clear parameters including a curriculum and timetable for the programme, and flexibility around planning. They also felt it would be helpful to have shared examples of good practice, access to resources such as age-specific texts, devices, links to local experts who could act as pupil mentors, and less pressure from outside agencies. In terms of the structure of the PEPA, just under half of teachers said they imagined delivering the programme gradually over a period of time, for example via weekly sessions, while just over a third said they imagined the PEPA would be delivered in a block of teaching, for example across a number of weeks in which the rest of the curriculum was suspended. The remaining teachers suggested other variations.

Through this data gathering between workshops, teachers also gained some feedback from pupils. This showed a relatively even split between pupils who would like to work in groups on the PEPA, and those who would like to work by themselves. Pupils were interested in sharing their projects via a range of media, such as live presentations, videos and podcasts and came up with a range of potential themes, including music, coding, identity, space, technology, engineering, baking, geography and art. All felt the PEPA would be enjoyable, help their learning and be useful after they left primary school.

Image 10: Pupil comments on the idea of taking part in the PEPA

"It is better to leave with more than your SATs because there is more to us than just that."

"I will always have this which will allow me to look back and see how much I have grown."

4 Our proposed PEPA programme

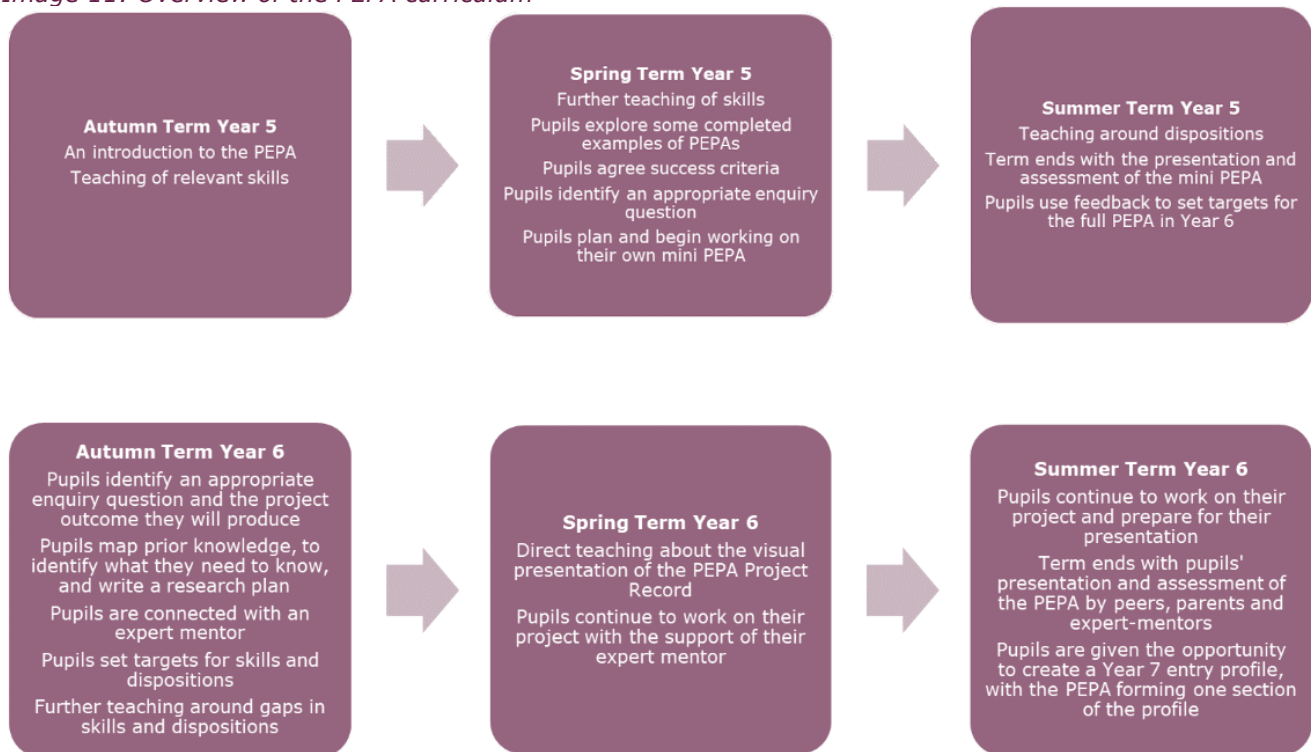
Our design process has invited welcome challenges to our initial assumptions about all aspects of the PEPA and moved our thinking forwards. Whilst there was not a unanimous consensus on all of the teachers' perspectives from our research process, we believe that we now have a model that is:

- clear about its overall purpose and operating model;
- has a strong rationale for the non-negotiables and where there is space for adaptation and innovation;
- has a robust research design that will enable a clear understanding of the programme's feasibility and impact.

4.1 Curriculum

Teachers mapped out a curriculum for the PEPA considering teaching and learning across Year 5 and Year 6. In Year 5 pupils will carry out a 'mini PEPA' in order to prepare them for the final assessed PEPA in Year 6.

Image 11: Overview of the PEPA curriculum



4.1.1 Autumn Term Year 5

The Year 5 curriculum will begin in the autumn term with some explicit teaching about research. Pupils will investigate and consider:

- what research is and what it is not;
- how to frame an enquiry question;



- how to locate reliable sources;
- sources beyond books and the internet;
- how to take notes and write in their own words;
- the need to identify the source of the information and not present it as your own.

There will also need to be some explicit teaching of skills around:

- how to generate and capture ideas, e.g. using graphic organisers or fishbone tools;
- general oracy skills e.g. dialogue, questioning, debate.

All these skills can be taught through existing curriculum content and will not need to focus on the pupils' chosen mini PEPA focus.

At the end of the Autumn Term, students will be introduced to the PEPA, the assessment framework and the dispositions that will be measured throughout.

4.1.2 Spring Term Year 5

In the Spring Term of Year 5, teachers felt that teaching should focus on explaining the purpose and assessment of the final presentation and enabling pupils to agree on some success criteria for a strong presentation. Alongside this, they felt some direct teaching of oracy skills would support students, both as presenters and audience members. Active listening, vocabulary development, tone of voice, effective questioning and responding to questions are some examples of these skills.

In the second half of the Spring Term, pupils will begin working on their own mini PEPA. Pupils will explore some completed examples of PEPAs, collected during prototyping phase, from inception to presentation and assessment.

Pupils will be supported by teachers to identify an appropriate enquiry question. Enquiry questions may be selected from a suitable range which the teacher may pre-identify in Year 5 but should be proposed by pupils for the Year 6 PEPA. We strongly suggest teachers encourage pupils to work in collaborative groups around a shared theme, although their individual enquiry questions might differ slightly. Facilitation would be more manageable for teachers if pupils are not all following very different lines of enquiry and because learning to collaborate (although not assessed as part of the PEPA) is an important skill which would support their work on the PEPA, for example through opportunities for peer assessment. However, student success should not be contingent on collaboration. Working collaboratively around a shared enquiry theme is not equivalent to producing a shared PEPA Project Record or being jointly assessed at the end of the project. If an individual pupil would benefit from working alone and this is manageable for the teacher, then this would be at the teacher's discretion.

Once enquiry questions are identified, pupils will then be encouraged to map their prior knowledge of the topic, to identify their knowns and unknowns, and to write a research plan. If expert mentors are being involved in this version of the PEPA, these will be sourced by the teacher and matched to pupil groups, and an initial meeting may take place to support the planning phase and/or baseline self-assessment.

For each of these stages, exemplars from other projects will be studied and analysed, to help the pupils understand the success criteria for the task. The teacher will model constructing a research plan, using metacognitive 'thinking out loud' processes to model this for pupils. At this point, the research stage of the mini PEPA is underway.

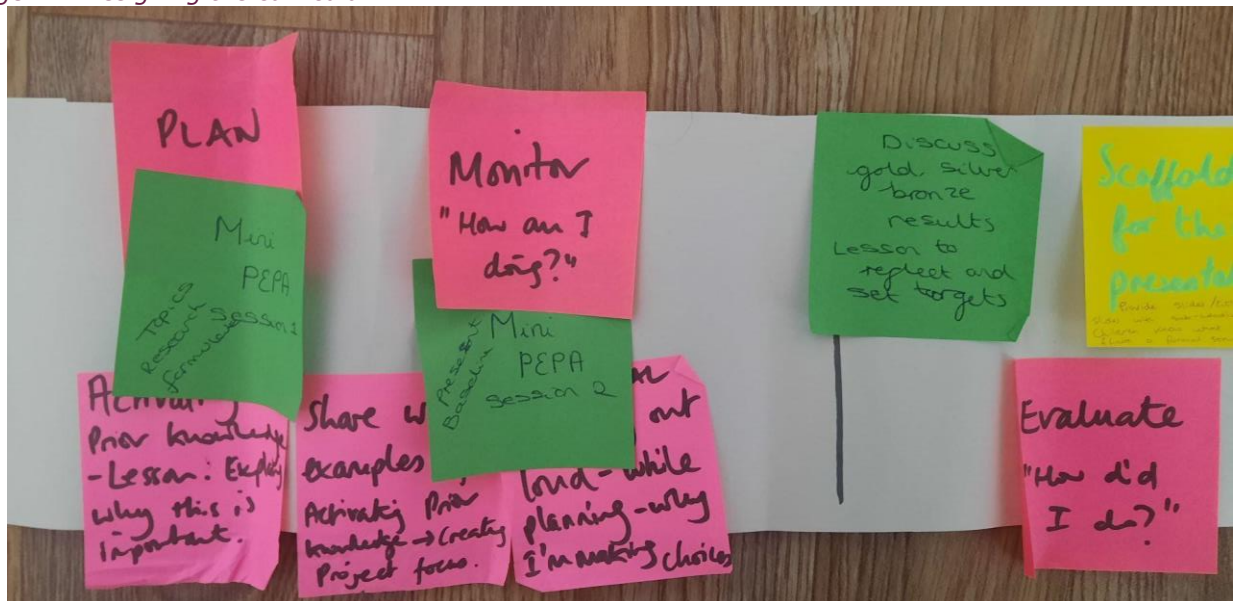
During this term, the Bronze, Silver and Gold assessment levels will be shared and explored. Pupils will be introduced to the process of self-assessing against these frameworks and encouraged to think about their strengths and potential areas for improvement, though they will not directly use the levels to set goals until Year 6.

Pupils will also review examples of the final presentation so that they understand what the final presentation and assessment might look like. Sentence stems will serve a dual purpose in this process; they will scaffold them both to help plan the delivery of their final presentations and to generate ideas of the sorts of questions they might be asked, so that they can plan their responses.

There will be some explicit teaching of ICT design skills, to enable pupils to work on the look and feel of their PEPA Project Records.

There will also be one more meeting with the expert mentor (if relevant), either at the end of the Spring Term or start of the Summer Term.

Image 12: Designing the curriculum



4.1.3 Summer Term Year 5

In the Summer Term, pupils will explore what a strong metacognitive process looks like, through reviewing exemplar material produced by other pupils. There will also be three direct teaching sessions, relating to each of the three dispositions (see Section 4.2 Assessment, page 25), exploring what the disposition is and what it looks like in practice.



A challenge will be set in each of these sessions, through which students can explore and interrogate their confidence in relation to the identified disposition. They will then be encouraged to reflect on their progress in terms of the dispositions so far, in relation to the goals and targets they set themselves at the beginning of the project.

This term ends with the presentation and assessment of the mini PEPA, involving pupils, teachers, parents, and expert mentors. Teachers will not give Bronze, Silver or Gold levels at this stage, but will provide descriptions of what pupils' strengths and the areas that they should focus on next year, taking into account self- and peer-assessment feedback, and feedback from parents and expert mentors (if relevant). Pupils will use this guidance to set targets for their full PEPA in Year 6, and gaps identified in skills and dispositions will be used to design some direct teaching experiences for Year 6.

4.1.4 Autumn Term Year 6

Year 6 pupils will be supported to identify:

- an appropriate enquiry question;
- the group they will be working in, if working in a group;
- the project outcome they will produce e.g. text, film, audio.

They will then be encouraged to map their prior knowledge of the topic in order to identify knowns and unknowns, and to write their research plan.

From this point onwards and throughout the lifetime of the PEPA, pupils will be encouraged to use an ongoing reflective loop in which, for each stage of the project, they:

- plan their process;
- review and adjust their plan;
- seek feedback from others;
- evaluate the success of their plan.

This metacognitive process will be explicitly taught by the teacher and modelled and evaluated during direct teaching sessions.

Pupils will also be connected, individual or in groups, with an expert mentor with expertise in their project theme, who will be able to support them in their project work, as well as contributing to the project they are exploring. They will meet their mentor at least three times during the project but may also decide to maintain more contact with them between these meetings. All contact with mentors will be compliant with good safeguarding practice.

Pupils will be taught how to carry out research (online, books, interviews, video, etc) for their chosen topic, identifying what is known and being deliberate in their selection of reliable sources. Identification of reliable sources will need to be explicitly taught.

They will also review their understanding of the dispositions, and the Bronze, Silver and Gold assessment criteria for the PEPA. In line with the learning from the mini PEPA, pupils will then set targets for the skills and dispositions they hope to achieve in this final PEPA.



4.1.5 Spring Term Year 6

In this term, there will be some direct teaching about the visual presentation of the PEPA Project Record (e.g. use of colour and design, level of formality, uniformity across the pages) and the oral presentation of content (e.g. where to stand, use of voice, body language and gesture, use of slides alongside explanation).

Pupils will continue to work on their project with the support of the expert mentor.

4.1.6 Summer Term Year 6

Pupils will continue to work on their project and to prepare for their presentation.

This term ends with the presentation and assessment of the PEPA to peers, parents, and expert mentors. Teachers will assign a Bronze, Silver or Gold level for each of the dispositions and skills, taking into account self- and peer-assessment feedback.

Teachers also felt that once the PEPA was complete, pupils should be given the opportunity to create a Year 7 entry profile, with the PEPA forming one section of the profile, and teachers might provide material to support pupils with their own identified areas for development. We will explore options for how secondary teachers can connect with the PEPA process and/or outcomes during the pilot.

4.1.7 Next steps

Based on the above termly breakdown, we will produce a curriculum overview and project timeline to support schools with the implementation of the PEPA.

4.2 Assessment²

4.2.1 Why are we assessing this programme?

Assessments can serve multiple purposes, and there can often be tensions between these purposes. It is worth stating upfront that the PEPA is **not** designed as an external accountability mechanism – for schools, teachers, or pupils.

We have identified our central, pupil-focused purpose and purposes for schools, teachers, and parents in the below table.

² Please note, this section focuses on the assessment of individual pupils, not on assessment/evaluation of the overall PEPA. Overall evaluation is discussed in section 5.1 on research design.

Table 1: PEPA's purposes

Central, pupil-focused purpose:
a) To enable each participating pupil to understand their progress against a small number of skills and dispositions, and how they can improve on them going forward.
School/teacher focused purposes:
b) To inform primary schools' approaches to the development of these key skills and dispositions, both during and prior to the PEPA programme c) Where possible, to improve secondary schools' understanding of the broader interests and capabilities of their new Year 7 pupils at transition.
Parent focused purposes:
d) To improve parents' understanding of the broader interests and capabilities of their pupils, and how these can be nurtured during adolescence.

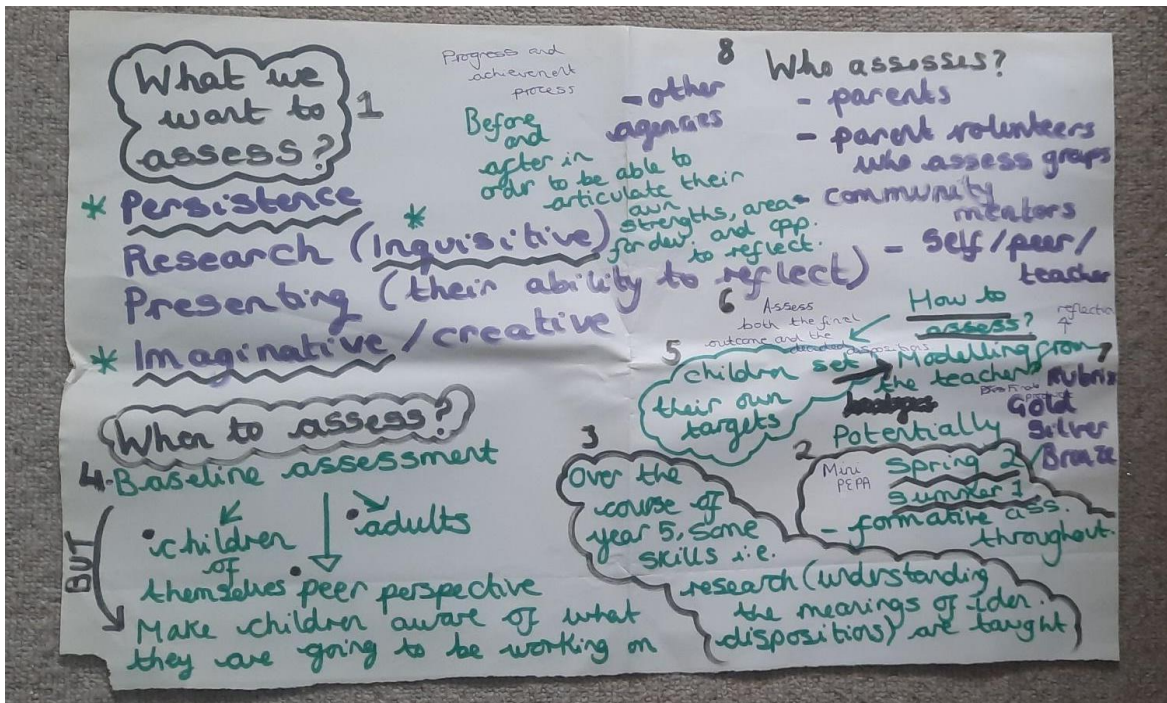
Across all four of these purposes, our assessment process aims to develop a **shared language** around these skills and dispositions, enabling better dialogue across school communities and families around the meaning and importance of these skills and dispositions.

4.2.2 What will we assess?

The PEPA's original draft Theory of Change described the following range of outcomes against which pupils could be assessed:

- progress against up to three learning dispositions as agreed in advance with each school from a menu of possible dispositions;
- improved research and presentation skills (including oracy);
- development of self-regulation;
- development of metacognitive thinking.

Image 13: What do we want to assess?



Through analysis of assessments found through our practice review, and discussions with participating schools, we came to the following consensuses:

- **Less is more:** We need to assess a smaller range of skills and dispositions than those originally suggested in our Theory of Change.
- **Consistency over choice:** All schools involved in PEPA should assess the same skills and dispositions. Schools are free to add others if they wish, but these will not form part of the core PEPA assessment process.
- **Not everything needs assessing:** Whilst the development of self-regulation and metacognitive thinking are important elements of the PEPA curriculum and pedagogical processes, these will not be assessed. Similarly, given that schools had differing views on whether PEPA projects would be carried out individually or collaboratively, we ruled out collaboration/teamwork as a disposition to assess.
- **Progression matters:** We need to go beyond simple binary 'I can' statements to enable learners and teachers to understand what progression might look like against each disposition. Whilst acknowledging that progress might not be as linear as in core subjects, such as literacy, teachers agreed that we should use 'Bronze/Silver/ Gold' descriptors throughout, with a possible pre-Bronze 'starting point' descriptor.

We therefore concluded that PEPA should focus on assessing the following five skills and dispositions:

Table 2: Skills and Dispositions

Skill/Disposition	Key existing assessment rubrics	Other notes
1. Research	EPQ	Focus on independence in selecting and managing information
2. Presentation	EPQ; Voice 21 Oracy framework	Needs to be adaptable to different media as selected by pupils (e.g. podcast, film, performance)
3. Imagination	Lucas' Creative Thinking Progression	Each broken down into three sub-categories, with four progression descriptors.
4. Inquisitiveness		
5. Persistence		

As soon as we secure investment for the next stage, a key immediate task will be to create a new, primary-friendly rubric for each of these skills/dispositions, refining these through further discussions and research with teachers. We are in discussions with academics Bill Lucas, Jen Groff and others who are already testing the creative thinking rubric in other contexts.

4.2.3 Who will carry out the assessment?

The key/chief assessor will be the pupil's **class teacher**. Informed by feedback from other assessors, he/she will arrive at a key 'grading' judgement at baseline and endpoint (see timings below).

Pupils will also be involved in self and peer assessment (in small groups of 3-4 pupils, ideally kept consistent throughout the PEPA process).

Each pupil's **external mentor** will also assess pupils at a minimum of two (and possibly more) points, mediated and moderated by teachers.

Parents will also be given opportunities to give feedback to their own and other pupils, but this will not be a formal part of the assessment process.

A process of moderation will be built into the project for participating teachers. We will analyse evidence of the quality of PEPA outcomes for pupils, as measured using a 'comparative judgement' ([Christodoulou, 2017](#)) approach. Teachers will share a small



number of PEPA projects and rank these in order to develop a shared understanding of what Bronze, Silver and Gold assessment outcomes might look like. They will then test this against the assessment awards given to their full set of PEPA projects. This should help moderate teacher assessment.

4.2.4 When will the assessment take place?

Our focus is largely **formative** – giving pupils feedback that can support their progress during the PEPA project.

There will, however, be a summative element. Three overall judgements will be made at the end of the PEPA on:

- the overall quality of each pupil’s final project;
- the one skill or disposition where each pupil has made the most progress OR had demonstrated excellence;
- One skill or disposition that each pupil might want to focus on improving as they move to secondary school.

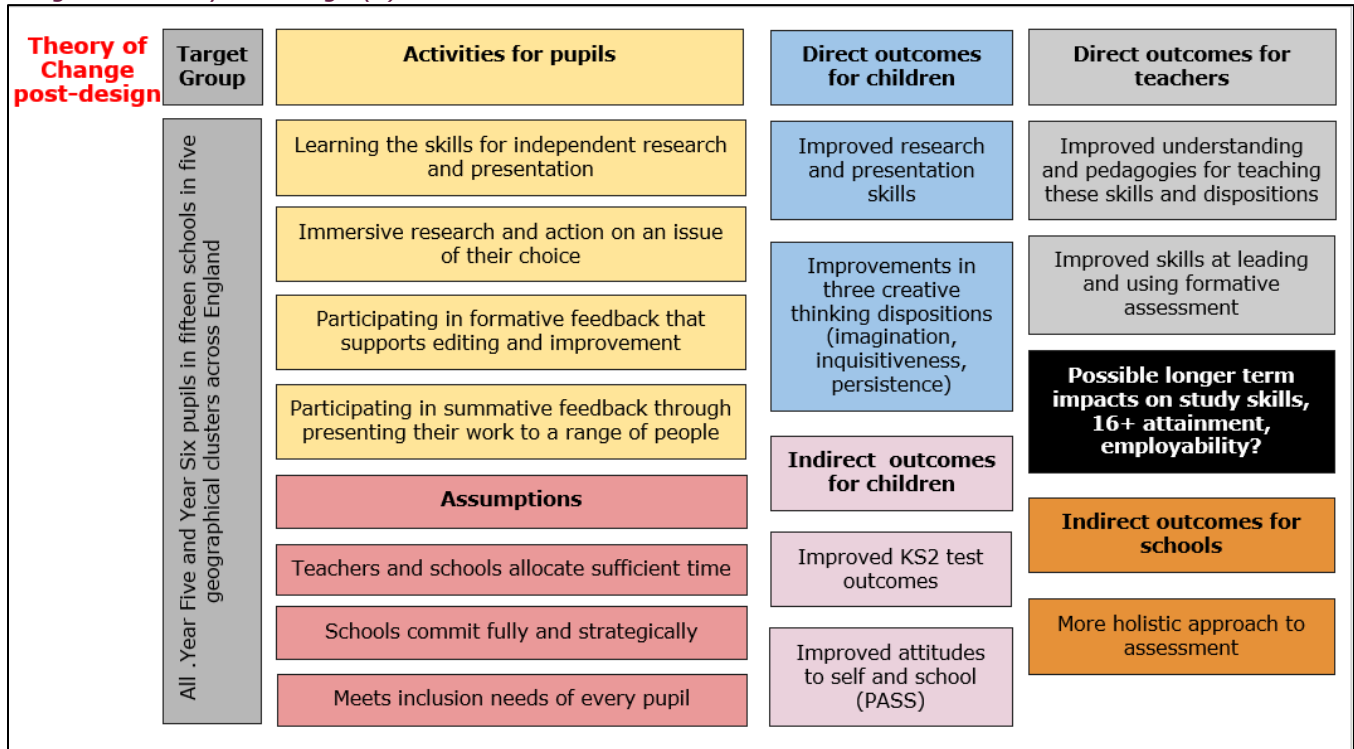
It was important to teachers that all pupils would achieve either a Bronze, Silver or Gold award; that is to say that the PEPA did not offer a ‘fail’ or ‘pass’ assessment award.

Table 3: Assessment Overview

Time	Artefact to assess	Who?
Y5 Spring or Summer Term	Mini PEPA	Teachers, pupils, peers
Y6 Autumn Term	PEPA project plan (written or verbal)	Teachers, pupils, peers, mentors, parents
<i>Y6 between Autumn and Summer term (optional)</i>	<i>PEPA project early draft/progress report (written or verbal)</i>	<i>Teachers, pupils, peers, mentors</i>
Y6 Summer Term	PEPA final output/exhibition (various media)	Teachers (as final judge of Bronze/Silver/Gold), pupils, peers, mentors, parents

As a result of our redesigned approach to assessment, we have made some minor changes to our Theory of Change.

Image 14: Theory of Change (2)



4.3 Assessment principles

The connections with the NCFE's AIF assessment principles remain as follows:

Table 4: Links in Assessment Principles

Principle	Relevance to PEPA	Link
1. Delivers a transformational learning and assessment experience for all learners that considers meta and technical skills development and provides learners with the insight and support they need to develop agency.	HIGH	PEPA will build in opportunities for metacognition, to help develop pupils' self-regulation - a key component of agency as a learner.
2. Enables personalisation in assessment by exploring the opportunities and limitations to personalisation within assessment.	HIGH	PEPA will be responsive to pupils' interests and current levels of development across a range of dispositions. Assessment will also be personalised through individual feedback from a wide range of adults.
3. Tests and evaluates a range of assessment methods and practices that support the development of an assessment system that is fair and inclusive by design and moves away from high stakes, stressful exams where appropriate to do so.	HIGH	Although PEPA aims to complement rather than replace SATs, it aims to support a more balanced accountability regime for primary schools, thus lowering the stakes for individual and school-level SATs performance.
4. The balance and interplay of formative and summative assessment and the implementation of technology to make assessment more readily available and fit for purpose and building a real-time picture of the impact of the learning.	MEDIUM	PEPA will shift mindsets from the idea of the teacher as the sole arbiter of success in the role of summative assessor, towards valuing formative self or peer assessment, and enabling self-regulation.
5. Establishes a culture that promotes innovation within vocational and technical education, training and assessment by working in partnership with regulators and the Department for Education to test and evidence new solutions and practices.	LOW	PEPA has no connections to formal vocational or technical education.
6. Uses data and technology in insightful and efficient ways to enable high quality teaching, learning and assessment removing the disconnect in data across the learner journey and taking account of data that exists on prior learning and experience.	MEDIUM	During the 'Define Stage' we will work with NCFE and relevant technology partners to identify possibilities for using technology during the prototyping (for instance, for safe and robust online feedback from other adults outside the school).



4.4 Inclusion

Teachers were keen to ensure that the PEPA was accessible to all, particularly those with identified special needs and disabilities. They considered the project design with particular pupils in mind from their own classes and suggested several ways in which the PEPA could be made accessible for pupils with additional needs, for example:

- providing a set of pre-made PEPA Project Report templates for SEND pupils to select from;
- giving writing frames to support different stages of the PEPA;
- supporting such pupils to use alternative recording and assessment methods e.g. video or audio, or transcription software.

4.5 Pedagogical starting points

Through discussions with teachers, we came to two important conclusions. First, that the programme did not, at this stage, need a binding set of pedagogical principles that all schools needed to adhere to. One headteacher suggested that all schools have pedagogical principles anyway, and schools who choose to participate in the PEPA pilot are likely to have principles that align with the overall goals and spirit of the PEPA. Second, that in writing the curriculum materials, we will make some choices about pedagogy which we will need to clarify and make explicit.

In discussion with teachers, we have therefore agreed on a small number of fluid pedagogical starting points that will influence the development of our programme:

1. Prioritising activities that enable **oracy and dialogue**.
2. Making deliberate space for **metacognition and self-regulation**.
3. Creating opportunities for **playful inquiry** that stretch and challenge the way that children approach tasks and develop new ideas.
4. Valuing the role of **direct instruction**, for instance in (but not limited to) the teaching of research and presentation.
5. Ensuring a focus on **responsive teaching**, using relevant assessment for learning approaches.
6. Building genuine time and space for ongoing **self and peer assessment**.

4.6 Professional development for teachers

Based on the stakeholder feedback, teachers identified some key areas in which teachers might require professional development or support. Drawing on this, we have considered an opening professional development process in which teachers:

- identify their own enquiry focus and work through their own PEPA, from initial idea, to research, to presentation, to assessment;
- assess each other's PEPA outcomes, using the provided assessment guidance material;

- plan into their own existing Year 5 curriculum the pre-teaching of research and presentation skills pupils will need for the PEPA;
- receive input on teaching self and peer assessment, metacognition and self-regulation, and research and presentation skills, including videos of this in action in classrooms and work samples from pupils;
- consider and plan for the specific needs of pupils with special educational needs and disabilities in their own classes, and see the available material to support these pupils.

Based on teacher feedback, we will produce the following support materials for teachers:

- an exemplar of at least one completed PEPA with a videoed presentation, to be built into a collection of exemplars as the pilot progresses;
- material to map National Curriculum links so that teachers can see the terms of research and presentation skills pupils will learn within the PEPA as part of the Key Stage 2 curriculum;
- step-by-step guidance on how to implement the PEPA;
- guidance on how to teach research skills within and beyond the PEPA;
- a list of external agencies to whom schools could reach out for 'expert' support for pupils working on the PEPA;
- signposting to organisations who can support teachers to develop the pedagogic skills needed to support pupils with the PEPA, e.g. oracy skills development support through Voice 21;
- planning documents for pupils to use when working through the PEPA;
- rubrics for the teaching and assessment of dispositions, research skills and the teaching of metacognition and self-regulation;
- scaffolding questions to support metacognitive thinking at different stages of the PEPA.

In addition, teachers suggested that we should consider support mechanisms for pupils with identified special needs and disabilities, for example:

- an online chat forum or case study examples of how teachers have enabled pupils with particular needs to access the PEPA;
- a portal of pre-made PEPA Project Report templates for SEND pupils to select from;
- writing frames to support different stages of the PEPA;
- guidance on alternative recording and assessment methods e.g. using video or audio, or transcription tools.

4.7 Professional development for mentors

Teachers also identified a range of support that would be needed to prepare external mentors for their role in the PEPA.

This included training to cover:

- the aims of the PEPA;
- an outline of their role;
- guidance on how to give formative and summative feedback effectively, drawing on assessment criteria/rubrics;

- safeguarding.

Training will be delivered online, potentially using a flipped learning approach where prospective mentors watch an online lecture before the training session, and then take part in group discussions and activities.

We will also create an online community of practice where mentors can discuss the successes and challenges of the work, alongside optional 'surgeries' with their pupils' teacher or others from the PEPA delivery team.

We will provide an opportunity for reflective post-PEPA feedback or evaluation sessions, which could inform future refinements to the programme. Mentors need to be prepared to deliver a minimum of three input sessions with their pupil(s), informing the direction of their project, and providing formative support and summative feedback.

4.8 Project Record design

We used Google Slides to build a [prototype Project Record](#), as the program is free and easily accessible to schools. Through the use of a gmail email address, pupils could also continue to use their PEPA Pupil Record after leaving primary school.

Image 15: Homepage of prototype Project Record



The Record is comprised of eight sections, which track an individual pupil's journey through the PEPA, as follows:

1. A 'Home' page which includes details of the pupil's background, values, interests, strengths and areas for development; a description of their chosen project theme; and a record of their progress in a chosen set of dispositions.
2. An 'Choosing my topic' page, where pupils record how they identified the topic for their project.
3. A 'Researching my topic' page, where pupils record their process for researching their project topic.
4. A 'Taking action' page, where pupils describe how they will turn their ideas into action.

5. A 'What I found out' page, where pupils record the main findings of their research.
6. A 'Presenting my project' page where pupils record examples of how they shared their finished project with others.
7. A 'How I feel about my project' page, where pupils record self assessment, including how they feel about carrying out and completing their project.
8. A 'How others feel about my project' page, where peer assessment and feedback from others - including teachers, parents, and expert mentors - is recorded.

Pages 2 to 6 include space for teachers to record the expectations or criteria relevant to that part of the PEPA, as well as space for pupils to record evidence of what they have achieved, and for pupils, peers, teachers and mentors to record their thoughts about the work. These sections would not necessarily require significant amounts of written work, but instead evidence and feedback could be compiled using a variety of media, for example photographs of project work, or short videos of pupils talking about their experiences or discussing their project with their peers, teachers, parents or mentors.

Image 16 & 17: Examples from prototype Project Record



How others feel about my project

How others feel about my work on my project now it is finished

What my teacher says about my project	What my peers say about my project
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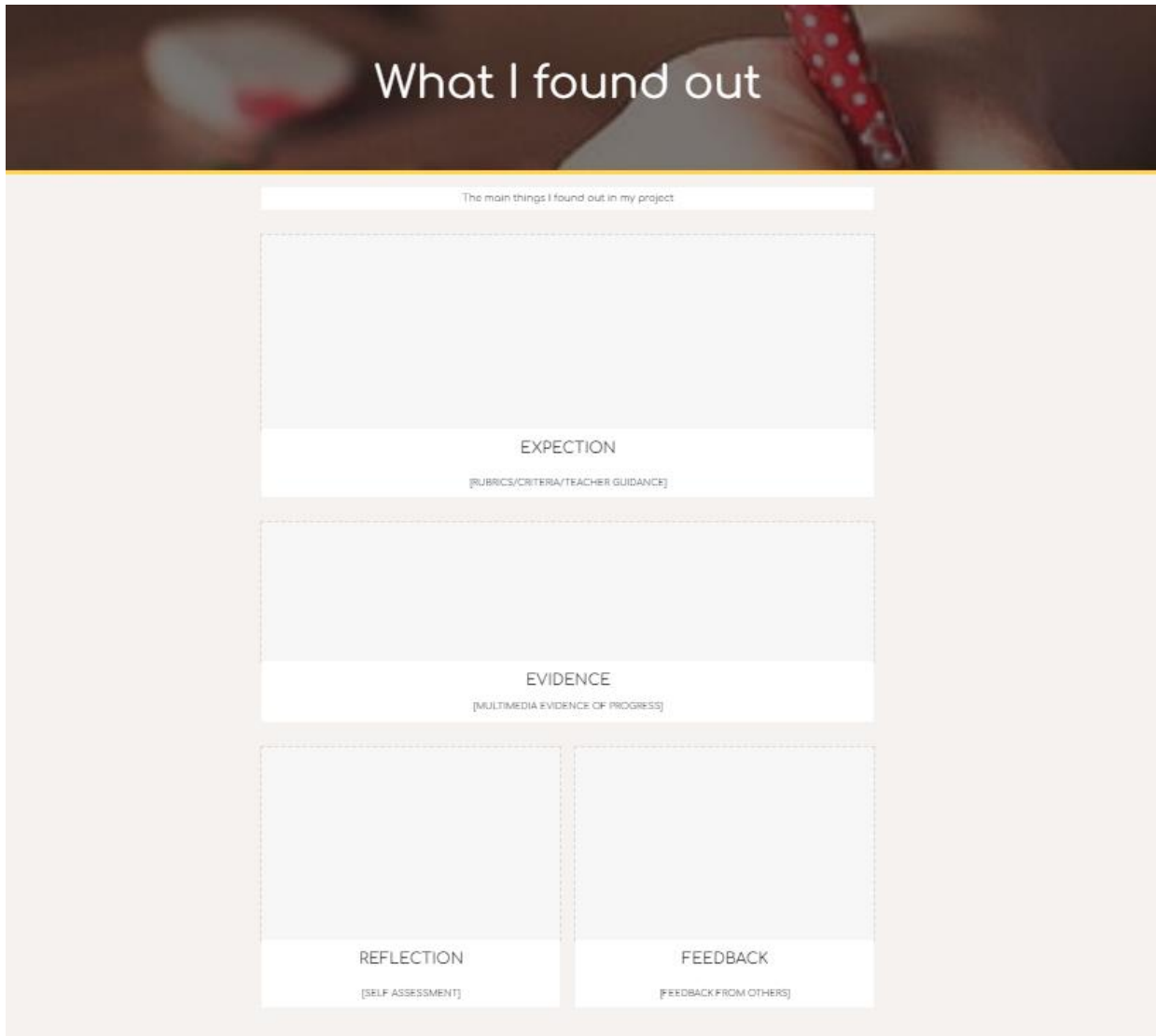
Page 7 offers space for pupils to record reflections on their PEPA experience overall, including:

- what went well, what did not go so well, and why;
- what they enjoyed and did not enjoy and why;
- the most important thing they feel they learned;
- what they most want to improve on;
- who or what could help them to improve;
- and what they plan to do next.

Page 8 includes room for feedback from teachers, peers, parents or carers, and others such as mentors at the end of the project. Again, this feedback could be logged using a variety of media.

This template provides a basic outline of how teachers and pupils could record the PEPA journey but is designed as a guide rather than a fixed resource. We expect that pupils would be able to personalise their own Project Records, and that schools might wish to adapt the layout and content to best suit their environment and the pupils involved.

Image 18: Example from prototype Project Record



What I found out

The main things I found out in my project

EXPECTATION
[RUBRICS/CRITERIA/TEACHER GUIDANCE]

EVIDENCE
[MULTIMEDIA EVIDENCE OF PROGRESS]

REFLECTION
[SELF ASSESSMENT]

FEEDBACK
[FEEDBACK FROM OTHERS]

5 What happens next?

5.1 Research design

There will be three future phases of research and development for the PEPA:

1. **Development Phase:** based on the workshop outcomes, we will produce a full set of materials and resources to support teachers with the implementation of the PEPA. These will be written by the central project team, with the support of two or three teachers from the workshops giving evaluative feedback.
2. **Prototype Phase:** a rapid test of the PEPA with Year 5 or 6 pupils in the classrooms of the teachers who took part in this preparatory phase.
3. **Pilot Phase** in which a wider group of schools and teachers will test the full version of the PEPA across two academic years.



The research design for both these phases is detailed below.

5.1.1 Prototype Phase

Design

This stage is a feasibility study and is therefore designed to be a quick and low intensity test of the draft materials that we will develop in response to teacher feedback from the workshops (as detailed above). We want to find out if the material we produce is sufficient for teachers to implement the PEPA and understand the extent and ways in which pupils benefit from experiencing the PEPA. We are therefore keen to get feedback from teachers involved in the PEPA design, before it moves to a full pilot, so that any necessary adaptations in terms of access and engagement of pupils and manageability for teachers and schools can be ironed out before the PEPA is used by a new group of schools and teachers.

As such, we recognise that the Prototype Phase will not include much of the preparatory work that teachers and pupils in the Pilot Phase will experience, for example the pre-teaching of skills in the previous academic year, the opportunity for pupils to try a lighter touch version of the PEPA before completing the final version, the professional development process for teachers, and a full set of PEPA exemplar material to share with pupils and teachers. However, we believe this phase will still provide valuable data that will ensure the Pilot Phase is as rigorous and comprehensive as possible.

We will meet three times with the teachers involved in the Prototype Phase in order to gather qualitative and quantitative feedback:

- one face-to-face workshop to share the PEPA resources we have developed, and seek initial feedback, as well as explaining the Prototype Phase in detail and expectations of them in relation to the collection of data;
- one online workshop to discuss successes and challenges of the PEPA so far, and gather suggestions for improvements;
- one face-to-face workshop in July to review PEPA outcomes, test the 'comparative judgement' approach detailed below, gather final qualitative evaluation data and plan for the Pilot Phase.

In addition, we will remain in regular remote communication with teachers in order to help them solve any implementation problems and provide additional resources, should that be necessary.

Sample

Seven schools will each test the PEPA with either one or two classes, either Year 5 or Year 6. Ideally, the teachers teaching the PEPA will be those who attended the development sessions, but it could be other teachers in the school, working with the support of senior leaders who attended these sessions.

The sample being evaluated will provide us with useful feedback so that the Pilot Phase is as fully thought through as possible.

Outcome measures

In the Prototype Phase we will collect evaluative feedback on the PEPA from teachers, headteachers, expert mentors, parents, and pupils.

From teachers, we will gather qualitative feedback on the implementation and impact of the PEPA on pupils collected through the workshops and via an online survey completed at the final workshop.

We will also ask teachers to provide quantitative evidence on the PEPA projects, such as:

- numbers of pupils completing and not completing, with reasons for any non-completion;
- a list of enquiry themes;
- details of adaptations made to promote inclusion;
- numbers of Bronze, Silver and Gold awards.

We will analyse evidence of the quality of PEPA outcomes for pupils, as measured using a 'comparative judgement' ([Christodoulou, 2017](#)) approach. In the final workshop, teachers will share a small number of PEPA projects and rank these in order to develop a shared understanding of what Bronze, Silver and Gold assessment outcomes might look like. They will then test this against the assessment awards given to their full set of PEPA projects. This should help moderate teacher assessment, a process which could provide a pathway for future quality assurance of the teacher assessment process in the Pilot Phase. It will also provide us with a central bank of exemplar projects with accurate assessment judgements.

Teachers will also be asked to issue short evaluative surveys to headteachers, expert mentors, parents, and pupils to gather their views on the PEPA: its manageability, enjoyability, their role in it, and its impact on pupils.

5.1.2 Pilot Phase

Design

This stage is designed to test the implementation of the PEPA in schools and classes beyond the design group, and as such is intended to be a proof-of-concept study.

For this research phase, the main research question is:

To what extent does undertaking the PEPA support pupils to make progress in their research, presentation and creativity skills and develop an improved attitude to self and school?

Additional questions are:

- a) To what extent does teaching the PEPA enable teachers to develop a better understanding of, and confidence and skills to teach non-cognitive skills as the underpinnings of improved academic outcomes?



- b) To what extent does teaching the PEPA enable teachers to have a more detailed understanding of pupils' individual learning needs and appropriate next steps in development?
- c) To what extent is the implementation of the PEPA manageable and enjoyable for pupils and teachers?

The Pilot Phase is a proof-of-concept study, involving baseline and impact data collection with control groups and a quasi-experimental design. The limited budget and associated manageability of the research makes recruitment to a Randomised Control Trial of sufficient power impossible. However, the use of preceding cohorts of Year 6 students in participating schools as a source of comparison with students who have completed the PEPA will provide an effective alternative to recruitment of control groups.

We will meet three times face-to-face with the teachers involved in the Pilot Phase, including:

- one face-to-face day to launch the project, induct teachers, share project resources, collect some baseline data and plan for additional data collection;
- one face-to-face day at the end of the first year of the PEPA to review Project Records using the comparative judgement approach, to reflect on its successes and challenges so far and to plan for the second year of implementation (including comparative judgement);
- one face-to-face day at the end of the second year to review Project Records using the comparative judgement approach, to reflect on the successes and challenges of the PEPA as a whole and to collect impact data.

Between these sessions there will be a series of half termly review and reflect sessions led by local Cluster Leaders: senior leaders or MAT leaders who will be supported by the central research team to lead sessions with their local clusters and who will be more closely involved in the iterative co-design of support material that teachers may request during implementation. The central research team will also quality assure local cluster meetings by attending and reviewing coherence across the sample. Finally, there will be three brief online sessions for school leaders (ideally headteachers) for onboarding, reflection, data collection and evaluation.

In addition, we will remain in regular remote communication with teachers in order to help them solve any implementation problems and provide additional resources to support classroom implementation, should that be necessary. At the end of the project, we will ask each teacher to send three anonymised PEPA Project Records (high, middle, low) to the central project team to act as a resource for future implementation.

Sample

There will be five clusters of primary schools in this phase, each having between three and six schools. Schools will be able to decide how many classes are involved in the Pilot, depending on the size of the Year 5 cohort. We will have one cohort in Wales, one in either Northern Ireland or Scotland and three in England (with only one in London). We will try to secure a balance of rural, coastal, and urban schools. Should all schools include



on average two teachers, and there be six schools in each cluster, this would mean 60 teachers from 30 schools, and 600 pupils experiencing the PEPA.

Should special schools express an interest in joining the Pilot, we could include a maximum of two. The PEPA is not specifically targeted at special schools and the materials and resources are not developed with this in mind. However, we believe there is the potential for the PEPA to be adapted to meet the needs of special school pupils, and having a special school involved who could take on the role of adapting the material might also support inclusion in the PEPA for mainstream special needs pupils.

We recognise that one of the limitations of this research is that the sample may not be a fair representation of the average primary school context for the PEPA, since these are schools who are more amenable to giving up time within the Year 5 and 6 curriculum to teaching material which is not of direct relevance to the SATs tests.

Outcome measures

In the Pilot Phase Outcomes will be measured using a range of tools, namely:

- a) attitude to self and school as measured by GL Assessment's PASS survey (GL Assessment has offered us use and analysis of this tool) (control and intervention groups);
- b) teacher tracking of numbers achieving different award levels and shifts in award level (Bronze, Silver, Gold) (intervention group only);
- c) teacher assessed measures of research/presentation skills from end Year 5 PEPA to end Year 6 PEPA (control and intervention groups);
- d) end surveys of pupils, teachers, senior leaders, parents will provide qualitative data on perceived impact, benefits and challenges of the PEPA along with implementation successes and challenges (intervention group only);
- e) pre- and post-surveys for teachers using Likert Scales to measure changes to confidence and skills in teaching research, presentation, creativity and using formative assessment (control and intervention groups);
- f) interviews with focus groups of pupils and teachers at the end of the first and second year of the project (intervention group only).

Table 6: Impact evaluation

Outcomes	Direct or indirect	Tools
Improved research and presentation skills	Direct	c, d, f
Improvements in creativity: imagination, inquisitiveness, persistence	Direct	c, d, f
Improved KS2 outcomes	Indirect	b, d, f
Improved attitudes to self and school	Indirect	a, d, f
Improved understanding and pedagogies for teaching outcomes	Direct	d, e, f
Improved skills at leading and using formative assessment	Direct	d, e, f

Alongside these pre- and post-PEPA measures, there will be ongoing iterative impact evaluation of the project, providing the project team with ongoing feedback on the implementation process, and enabling us to support teachers more effectively as the project develops. The project team could, for example, provide additional support material and guidance, or mediate with senior leaders about blockers to implementation.

Validity

The breadth of the sample size in terms of school type and location should provide a valid set of data on implementation and impact. However, the Pilot Phase will inevitably attract a group of schools who are committed to exploring different approaches to the 'teaching to the test' curriculum often found in Years 5 and 6, and more open to valuing teaching and assessing non-subject areas of learning. There may therefore likely be fewer and different barriers to implementation than in schools more broadly. The sample set may not be representative of the average school.

Ethics

Table 7: Ethics in both phases of research

Ethical issue	Mitigation
Sharing of pupil PEPA records beyond schools (safeguarding and GDPR)	Information sheets and consent forms for pupils and parents - for pupils whose parents do not consent, no Project Records will be shared beyond the school. No digital sharing permitted without full anonymisation (i.e. Project Records remain on the school's secure server).
Risk of harm to pupils e.g. lowered test results, reduced motivation to learn, presentation anxiety	This risk should be minimal due to the careful planning done by participating teachers. The amount of curriculum time committed to the PEPA is not sufficient as to lead to lowered results and has in fact been specifically designed to improve learning. Alternative presentation formats are available and advised for those with presentation anxiety.
Risk of harm to teachers and/or schools e.g. lowered test results, linked to teacher/school performance	This risk should be minimal due to the careful planning done by participating teachers. The amount of curriculum time committed to the PEPA is not sufficient as to lead to lowered results and has in fact been specifically designed to improve learning. A clear information form and consent will allow participants to opt in or out at any stage of the research project, should this be seen to become problematic.

