

Education Business Link Clusters Evaluation

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Institute for Employment Studies

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Executive Summary

In September 2000 groups or clusters of schools were invited to work in partnership to develop joint approaches to education business link (EBL) activity, with the support of a specially appointed broker. A pilot cluster was established in each of the nine English regions. The pilots were funded for a total of two years to test the impact of a broker working with a specific cluster of schools – particularly in the areas of developing a progressive experience of the world at work from an early age up to pre-16 work experience and teacher placements.

The Institute for Employment Studies (IES) was commissioned in September 2000 to develop a national evaluation framework and to use it to assess the value of the pilots. IES conducted a range of visits to the pilots, interviewing brokers and other intermediaries and representatives from schools and employers and held a series of workshops involving representatives from the pilots.

Ten main messages

The ten main messages to emerge from the pilots were that:

- Brokers can help improve both the quantity and quality of EBL activity. Brokers are key to better education business links.
- Brokering is more important than clustering. The single most effective input in the pilots was the broker without whom few of the successes in terms of improved EBL activity would have been achieved.
- Clustering can work, but only in the right circumstances, *eg* where there is an additional strong rationale for schools working together. Even then collaborative working may need facilitating by a form of broker.
- EBL is generally viewed as a marginal activity. There are many demands placed on schools' time and many think that EBL is only naturally relevant to a minority of pupils and not mainstream.
- Winning schools to the relevance of EBL takes sustained input and evidence. Senior management support is critically important. To achieve this brokers need to provide a sustained effort and be able to demonstrate the effectiveness of EBL activities on student outcomes.

- EBL can achieve results – four schools reported that involvement in EBL activities improved pupils’ motivation and confidence and contributed to better results.
- EBL activity requires funding. Few schools have the financial resources to undertake high levels of EBL activity on their own.
- Effective brokering requires a range of skills and approaches to be able to work at a number of levels: strategically; operationally; and administratively.
- Brokers provide the time and expertise lacking in schools.
- Customised support is more effective than pre-conceived activities. EBL activities are best designed flexibly to meet particular needs.

Pilot achievements

The achievements of the clusters as a whole were assessed in a range of areas identified in the evaluation framework covering; the quality and quantity of EBL activity; how EBL activity is managed in schools; the impact on work experience and teacher placement programmes and employer involvement.

The quality of education business link activity

We found that the quality of EBL activity in most of the schools involved with the clusters had improved during the course of the pilot and in particular there was evidence of:

- **Progress from Key Stages 2 to 3:** a large amount of new activity generated in the clusters focussed on maximising the chances of children making a smooth transition to secondary school. As a result there was a considerable increase in the volume of activity at primary level, greater attention to transition issues and progression between Key Stages 2 and 3. In turn this led to better links between primary and secondary schools at that level, *ie* teachers having a better understanding of the pupils and what they have done/will do pre and post transition. Teachers also reported that pupils entering secondary school were better motivated and prepared.
- **Progress from Key Stages 3 to 4:** less attention appears to have been given to activities in senior school and most of the work appears to be in terms of auditing and planning. No school developed a co-ordinated approach to EBL across Years 7 to 11, although many appeared to have made progress towards this end. The constraints at this level in terms of availability of in-school resources, the limited ability of a few teachers to make a difference and the importance of the mainstream curriculum and GCSEs proved to be significant barriers.

- **Better planning:** where activities were undertaken, there was considerable evidence that they were planned with clear learning objectives and links to the curriculum.

Management of EBL in schools

Most of the schools became more interested in and aware of the benefits that EBL activities could provide. In a few cases school policies on EBL activity were developed and development plans gave greater prominence to EBL activity. However in other cases it is not clear that greater commitment and interest will continue to be translated into activity without the support of the broker to maintain momentum as other calls on teacher time and attention take hold. In some cases, schools became more willing to share ideas, although generally collaborative working was limited.

General EBL activity

Generally more attention appears to have been paid to EBL activity in the schools involved in the clusters than would otherwise have been the case – particularly in primary schools. It is likely that some activities will continue beyond the life of the pilots, but not at the same volume.

Work experience

Few of the pilots concentrated on work experience. Those that did focussed on improved preparation and, to an extent, better quality of placements. While both are important and some of the preparation events were reported to be extremely successful and motivational, neither amount to major innovations in the provision of placements.

Teacher placements

Again teacher placements were only a feature in a minority of pilots. However, involvement does seem to have brought about both an increase in placement activity (with some schools taking part in placements for the first time) and a greater focus on the placement in terms of building links with the general curriculum. The latter led to spin-offs in terms of other EBL activities (such as projects or work experience). However most placements were short in length – one or even half a day (arguably too short to make a significant difference). Placements therefore tended to be fairly instrumental in their aims (*eg* to secure better work experience placements or to organise a particular curriculum project), *ie* a means to the end of securing more EBL activity rather than ‘continuous professional activity’ in the human resource development sense. It is clear that placements are highly dependent on external funding (for supply cover) and support (to broker the arrangement).

Relationships with employers

There is evidence of schools building a larger number of and, in some cases, more effective and longer-term relationships with local employers. Although the total number of such 'partnerships' is fewer than the number of clusters, their success has provided a model and inspiration for more to be developed in the future.

Brokering and clustering

The broker

A general conclusion of this evaluation is that the broker has been crucial to the success of the pilots, although across the nine pilots, the role of the broker was structured and resourced in different ways and the broker performed a number of roles.

The way in which the pilots deployed the broker varied between two general models:

- **Stand alone** – individual specially appointed broker working largely on their own.
- **Split** – two or more individuals in a job share and/or taking forward elements of the broker role between them (*eg* one working with primary schools another on teacher placements *etc.*).

The broker played both a **strategic** role – *eg* persuading schools of the value of EBL activities, auditing existing activities and identifying opportunities to develop materials, processes and procedures for schools to use on their own - and a more **operational** role *eg* making contacts and forging relationships, helping initiate projects and/or participating in activities. In addition many respondents highlighted the crucial importance of **administrative** support provided by the broker.

The key aspects of value that brokers brought to the clusters were:

- *Expertise* – *eg* to advise at a number of levels from the development of work-related learning policies to how best to design an individual activity.
- *Time* – to plan and organise activities.
- *Contacts* – with employers, other schools, or other sources of help or expertise.

Clusters

The clusters varied in the way they were structured and operated, which made comparisons difficult. The key points of value from grouping together of schools in clusters appear to be:

- The sharing of ideas and resources.
- Sharing experiences and knowledge.
- Maintaining a momentum.
- Fostering support between schools.
- Improving awareness of pupil needs and transition.

However, the benefits of being involved in a cluster varied. The most beneficial relationships appeared to be between secondary and primary schools and (to a lesser extent) between primary schools rather than between the secondaries. Where involved, special schools benefited considerably from working with other schools.

Funding

Many of the pilots devolved some of the funding direct to schools and all used an element of the funding to finance particular activities or support the cluster. The funding was particularly important in financing supply cover for teachers and was reported to have had a proportionally more significant effect at primary level.

Sustainability

The general view among our interviewees was that few of the clusters were self-sustaining, beyond the life of the pilot as the broker was crucial to maintaining the vibrancy of the cluster. However in at least three areas there were plans to continue and/or extend the broker model and funding had been sought or secured from bodies such as the local Education Business Link Organisation (EBLO) and others.

1. Introduction

In each of the nine English regions, groups of schools (henceforth referred to as clusters) were invited to work in partnership to develop joint approaches to education business link (EBL) activity on a pilot basis. Each of these clusters was supported by a specially appointed broker. In most cases the pilots were managed by the local Education Business Partnership (EBP). Funding was initially provided for one year (September 2000 to July 2001) and was subsequently extended for a further year until July 2002.

The Institute for Employment Studies (IES) was commissioned to evaluate the initiative as a whole, in September 2000. We established a national evaluation framework, and conducted periodic visits to those involved in the pilots and also workshops with brokers and others over the two years.

This report sets out the findings of the evaluation. The rest of this section describes the background to the pilots, the aims of the evaluation, the key points of the evaluation framework, brief details of the nine pilots, and the structure of the rest of the report.

1.1 Background to the pilots

In June 2000, the nine English Government Offices were invited to seek bids from Education Business Partnerships in their area to put together clusters of schools to act as pilots to:

- develop a community of practice among schools in the cluster
- test the concept of schools with a 'proven track record in teacher placement' as centres of excellence . . . using the placement as a focus for a range of integrated business link activity', and
- test the value of a planned programme offering progressive experiences of the world at work to pupils from an early age especially from Key Stage 3, leading to the work experience placement.

Using either work experience or teacher placements, or both, as start points, the pilots were intended to enable a linked group of schools to develop and implement a joint strategy and action plan in respect of EBL activity at each Key Stage, and to learn from

each other in recognising and realising the benefits of that activity to their pupils, staff and whole school, and to the businesses involved. The pilots were designed to test whether and how enhanced brokerage support and greater collaboration between schools could deliver a step change in the contribution of EBL to the desired outcomes.

It was anticipated that the benefits of working together in a cluster of schools could include:

- learning from each other, in particular from a school that had been included because of its impressive record to date in respect of working with business
- sharing ideas, joint activities and resources
- aiding the transition from primary to secondary
- full-time dedicated expert advice and brokerage support.

The pilots were allowed considerable flexibility to accommodate local circumstances and encourage innovation. However, it was intended that each cluster would normally:

- comprise two secondary schools and their link primary schools
- include one secondary school which was already very active and committed in its approach to EBL and keen, with the assistance of quality brokerage support, to become a centre of excellence in developing those links and in disseminating the benefits derived from them within their own schools and the other schools in the cluster
- only include schools in which there was 'whole school' support (senior management team, rest of staff, and governing body) for being involved in the initiative
- only include schools which were genuinely interested in working with others in the cluster, both in terms of planning and sharing ideas and experiences, and in a practical, collaborative way
- include a secondary school where it will be possible to demonstrate the potential for EBL activities to promote inclusion, benefiting the 'disaffected' and the 'disapplied'
- not include FE or sixth form colleges that can be drawn in later when the concept has been properly tested in mainstream schools.

Not all the pilots managed to achieve all these criteria (see 1.4).

Each of the pilots was provided with £32,000 funding in the first year (and a similar amount in the second year) channelled through Government Offices to the EBPs against an agreed workplan. Typically, half the funding was spent on funding the broker and the rest was used to fund the clustering process,

particular projects and/or distributed to participating schools to fund cluster-based activities.

1.2 Aims of the evaluation

The aims of the evaluation were to:

- provide guidance and support to the clusters – for example, by providing advice on local data collection and evaluation activities
- develop and operationalise a national evaluation and reporting framework that addressed both process and outcome issues
- assess the effectiveness of both individual clusters and the initiative as a whole against local and national aims, and anticipated impacts
- assess the wider potential of this type of development strategy and make recommendations to inform a possible larger scale initiative in the future
- inform the emerging Learning and Skills Council agenda and DfES planning.

1.3 Evaluation framework

The nine pilots each focussed on different aspects of improving the quality of EBL activity. The evaluation framework sought to draw together the various elements of the individual projects into a number of strands (and to establish a range of indicators and data sources by which progress in each of these areas could be measured). The main themes included:

- the quality of education business link activity – in terms of the clarity of purpose for EBL in schools, progression between Key Stages in EBL activities, the coherence of EBL activities across and within schools
- the management of link activity in schools – as measured by the existence of school policies and other evidence of commitment to EBL activities
- the quality of the secondary school work experience programme
- the number and quality of teacher placements
- the involvement of employers with schools, particularly the development of deeper partnership arrangements with employers.

Inevitably, this framework did not actually capture the full range of activity undertaken by the pilots. In this report, although we follow the broad outline of the framework, some of the more

detailed areas on which we are able to present findings are slightly different from the structure originally envisaged.

The purpose of the framework was to focus the evaluation on the value of the three elements behind the initiative, and to identify the benefits of the broker role, the clustering of partner schools, and the discretionary funding available to the broker.

Each of the pilots was visited on a number of occasions (generally four or five times over the two years) by members of the national evaluation team. In each of the areas, the evaluation team attended cluster meetings. Schools and EBP personnel, and others, were interviewed and data collected on the indicators set out in the evaluation framework. In addition, pilots have carried out their own evaluations, the results of which have generally been made available to the evaluation team. Five workshops have been held, organised and led by the evaluation team, involving representatives from all of the clusters to discuss issues emerging from the pilots, structured around the evaluation framework.

1.4 The nine pilots

Pilot projects were established in each of the nine English regions. Anonymised summaries of each of the pilots are set out in Appendix 1. As the summaries testify, the pilots varied considerably in terms of:

- their size and structure
- the geographical area covered
- the way in which the role of the broker was carried out, and
- their overall approach.

1.4.1 Size and structure

There were four different models or structures in operation.

- in four areas, the cluster involved two secondary schools and some or all of their feeder primaries (between six and 12 depending on the area)
- in three further areas, the model focussed on one secondary school and its feeder primaries (at least eight, and in one case over ten)
- in one area, the cluster comprised two secondary schools (one of which was a special school) and two primary schools (one of which was also a special school)
- finally, the last model involved three 'mini clusters' comprising a secondary school linked to two primaries.

In all, some 16 secondary schools and around 70 primary schools were involved in the pilots during the first year. Two of the groups established their own identity, with names and logos *etc.* and formal constitutions.

In the second year, most of the pilots kept the same structure, although in one case the membership changed as one of the original secondary schools dropped out and was replaced (Case Study D). In some of the others, it was reported that some of the schools in the cluster became more involved in the second year compared to the first. Four did make major changes to the structure of the cluster:

- in one case, the cluster was expanded to include all the primaries within its geographical area (Case Study A) and in another (Case Study H), a further secondary school joined the cluster during the second year
- in a second (Case Study B), the cluster was extended to incorporate another secondary school plus ten primaries, to assess the impact of a larger number of schools on the workload of the broker and the sustainability of the approaches and activities developed in the initial (smaller) cluster of schools
- in another area (Case Study G), the cluster was formed afresh in a different part of the county, with the aim of testing the transferability of the model to a rural area (having been tried initially in an urban area)
- in a fourth area (Case Study H) a second cluster (one secondary with feeder primaries) was initiated in Year 2 partly to assess the degree to which the first cluster was self-sustaining and to help widen the dissemination of the pilot. In practice, the start of the second cluster was delayed as it became clear the first cluster required additional support.

Thus, in the second year, there were some 17 secondary schools and around 85 middle/primary schools involved in the nine pilots – *ie* averaging around two secondary schools and ten junior schools in each area.

1.4.2 Location

The pilots were established in different geographical situations *ie*:

- rural – one of the pilots was established among schools in a fairly wide rural area
- rural/urban – three of the pilots were situated in mixed areas, either in market towns or based partly in an urban and a rural area
- urban – five of the pilots were based in predominantly urban or suburban areas.

1.4.3 Broker provision

The way in which the brokerage was structured also varied (see Chapter 3) and in some cases there was a personnel change between Year 1 and Year 2.

1.4.4 Approach

Some of the pilots focussed primarily on strategic work, *eg* helping schools create a general framework for the EBL activities by auditing existing links and/or plan activities better, and link them to curriculum or other educational goals. Others were more activity-oriented, concentrating on working with schools and others to develop new, or improve existing, EBL activities. Most pilots worked at both a strategic and an activity level, but varied in the balance between the two. In at least one case the focus of their approach moved along the dimension as they turned to helping schools translate the plans made in the first year into action.

1.5 Structure of the report

This report examines the two years of the initiative within the context of the framework and specifically focuses on:

- the achievements of the pilots – in terms of the education business link activity that the pilots have brought about and, crucially, the extent to which the activities are sustainable beyond the life of the pilot funding
- the sources of added value – looking at the role of the broker, the process of partnership between the clusters of schools and the funding provided to schools and the influence they had over pilot outputs
- other factors affecting the success of the pilots
- the main lessons that can be drawn from the pilots.

2. Achievements of the Pilots

In this chapter, we summarise the main achievements of the pilots against the main strands of the evaluation framework established at the outset of the initiative. The framework identified six areas of achievements in the pilots, *ie* the extent to which there was evidence that the pilots had contributed to improvements in:

- the quality of EBL activity – and particularly the extent to which there was evidence of better planning for individual activities, progression in activities between Key Stages and increased coherence and co-ordination between activities
- the quantity of EBL activity – at all Key Stages
- the provision of work experience
- the provision of teacher professional development placements
- the commitment from businesses and the wider community
- the management of EBL within the school – and the extent to which they have adopted EBL policies and/or cemented EBL in development plans and shared good practice via interactions with other schools and the broker.

Below we assess the evidence under each of these areas in turn.

2.1 Quality

We found evidence that the pilots had contributed to improving the quality of EBL on a number of fronts:

- progression in EBL activities
- better planning
- improvements in the management of EBL in schools.

2.1.1 Progression

One of the areas where the pilots as a whole have had a distinct impact is in building more progression into EBL activity so that there is more activity across the Year groups and elements of continuity and accumulation between one year and the next. The area where most work in this regard has taken place is between

Years 6 and 7, *ie* the last year of primary school and the first year of secondary school. However, there is also evidence (but not as much) of more progression between Years 7 to 11, where there is often felt to be gaps in provision (typically in Years 8 or 9) and/or little relationship between the sort of activities taken from one year to the next. In some pilots elements of progression had been developed in primary schools (*eg* Case Study B).

Primary/secondary transition

We found that all of the nine pilots sought to develop activities which aimed, at least in part, to ease transition between Years 6 and 7. Some pilots focussed on work within primary schools that would help pupils make the transition, (or between middle schools and high schools *ie* Years 8 to 9). Others developed activities which involved pupils from both the primary and secondary schools in the cluster.

Examples of the types of projects undertaken across the two years include:

- all the primary schools in one cluster had used 'Going for Gold' among their Year 6 pupils – a target-setting activity felt to aid transition to Year 7 when pupils take their workbooks with them (Case Study C)
- in another cluster, various projects were planned and carried out involving Year 7 and 8 pupils from the mainstream and special secondary schools, and Year 6 from the primary schools, including enterprise activities and a Maths Challenge Day. In the second year the Maths Challenge was held on an employer's premises (Case Study A). Another (Case Study H) held a 'Maths Fest' involving activities involving local schools and businesses, and enabled children from Years 6 and 7 to work together
- in a further area (Case Study E), some of the schools had developed a co-ordinated business and communities activities week, across Years 5, 6 and 7
- in a second sub-cluster of Case Study E a 'recruitment fair' was devised which involved pupils in Year 8 in two middle schools working together to produce recruitment information for pupils in Year 9 in a high school to assess the local labour market and employment opportunities
- other pilots explored various ideas, *eg* using the 'Make it Real/Real Game' game in Years 6 and 7 (Case Studies D and I), and working with employers to develop coherent approach to EBL activity across Key Stages 2 and 3.

Passport to Key Stage 3

One of the pilots (Case Study I) developed a 'Passport' for pupils in primary schools to take with them to their secondary school. The idea was developed among one of the secondary schools and its feeder primaries, and records non-academic achievement (*eg* attendance and punctuality). It has proved very popular in those institutions. However, a trial in the other secondary school in the cluster and its primary schools in the first year did not prove successful, as the primaries felt the exercise was too bureaucratic and replicated existing information passed to the secondary school. However, in the second year, a personal statement for Year 6 students was developed and completed with the intention of forming part of a larger portfolio of students' work and attainment.

The passport idea was taken up by another pilot having heard about it through an evaluation workshop (Case Study H). In this cluster the passport included basic key skills and the idea attracted a further secondary school to join the cluster in the later stages. It is also likely that the second cluster in this area will develop a 'passport'. This idea has also been adopted by other schools outside the pilots.

In a third (Case Study A), pupils in Key Stages 1 to 3 kept diaries which describe their EBL experiences and their learning (*eg* related to key skills). In a fourth (Case Study D) students kept a record of how EBL activity helped them develop the skills and attributes required for the world of work (termed the WOW factor).

Progression between Key Stages 3 and 4

A number (but not all) of the secondary schools involved had reviewed their work-related curriculum and EBL activities across the Years and had taken steps to develop a more coherent programme with in-built progression. None had yet achieved a comprehensive five-year programme, but at least four had done one or all of the following:

- audited all activity across the school and identified the major gaps in provision (usually in Years 8 or 9)
- reviewed activities in Years 7 and 8 and developed a more cumulative programme
- reviewed activities in Years 9, 10 and 11 leading up to work experience with the aim of developing more coherence
- and at least one (Case Study I) was working on more coherence across all Key Stages.

2.1.2 Planning

There was quite a lot of evidence to suggest that where activities were undertaken, they took place with clearer learning objectives for participants, and connections were made to the wider curriculum (eg Case Studies C and F). Often the broker was instrumental in enhancing schools' approaches in this way, eg by developing learning objective sheets, and providing general advice and guidance. For example, in Case Study A, a 'progress form' was developed setting out expected outcomes for EBL activities, what worked in practice and any areas for improvement. However, it was not used in every school or for every activity.

A further example of better planning is that in at least two areas, primary and secondary schools had reviewed their EBL activities to ensure that there was no duplication between Years 5 and 6 on the one hand, and 7 and 8 on the other.

Other examples of better planning include:

- in Case Study A, a primary school had developed a matrix which mapped the curriculum by Year group against workplace visits and external activities
- in Case Study H, history schemes of work for Key Stages 1 and 2 were reviewed to explore the application of key skills, work-related learning and EBL activity. The review was supported with training sessions for teachers.

Audits

In most of the areas, the broker conducted a review or evaluation of existing EBL and work-related learning activity in schools (eg Case Studies A, B, D, E, F, G and H). This was felt to have been very useful in terms of increasing understanding in schools of how EBL could help deliver the curriculum and in identifying gaps in current provision. It also showed schools how much EBL work they already undertook, but was conducted by individual departments or teachers in an unco-ordinated way. In one area (Case Study E) the broker referred to improvements in their own understanding and role through undertaking an audit and ensuring that activities are linked to school needs and learning objectives.

Materials

In Case Study F, considerable attention was given to the development of a range of work-related curriculum materials, covering most areas of the curriculum for Key Stages 1 and 2, and Year 7 in Key Stage 3. These materials were well received by

schools and employers, and were felt to be good examples of how EBL-related activities could be applied to the wider curriculum.

2.1.3 Management in schools

In all the pilots, schools reported greater interest and awareness of the EBL agenda as a result of their involvement with the pilots, as evidenced by:

- a greater willingness to get involved in activities suggested by the broker
- senior management involvement (*eg* at cluster meetings). It was notable that where senior management remained uncommitted to EBL activities, the schools were significantly less engaged. By contrast, in at least two (secondary) schools an EBL enthusiast took over the headship during the course of the two years, and the schools engagement was reported to have increased significantly
- governor involvement in EBL activity (*eg* Case Studies A and D) and dissemination within schools to governors' and staff meetings (*eg* Case Studies F and H).

However, not all the schools involved in each of the pilots became more committed. For instance, in one area (Case Study H), it was reported that only a third of the schools involved had exhibited significant changes in the management and organisation of EBL.

The key point here is the extent to which such interest is sustainable. In a few pilots (*eg* Case Studies A, B and D), we were able to observe:

- more comprehensive and detailed school policies towards EBL in some cases at primary level (often for the first time in documented form) and in other cases at secondary level. In all cases, the introduction of the policies were a result of significant broker activity, *eg* in Case Study B the broker developed a model policy which schools tailored to their individual circumstances. In other areas there were intentions to explore the possibilities for developing policies for EBL in future. However, in Case Study I, a similar idea was not successful and had to be abandoned as it proved difficult to draw up and agree a sufficiently comprehensive policy in such a rapidly developing and broadening area
- a greater priority placed on EBL in school development plans, particularly in primary schools, where there had been little engagement with EBL activity before their involvement in the pilot
- building in work-related learning and EBL into schemes of work (Case Study H)

- sharing of ideas between schools – although limited, particularly between secondary schools (see Chapter 3). There was evidence in all the pilots of schools (primaries especially) interested in taking on board new EBL ideas (*eg* from the broker) and willing to be constructively challenged about how they approached EBL work (*eg* in cluster meetings), see Case Studies A, F and I. In at least one area (Case Study H), there was some joint work between schools independent of the cluster. While in another area, respondents expressed some disappointment that materials developed within the cluster had not been taken up by schools elsewhere.

2.2 Quantity of EBL activity

In nearly all the pilots, schools took part in trialling or developing particular projects as a result of their involvement in the pilots.

Examples of the activities piloted include:

- Mission is Possible – a numeracy aid using the local newspaper (Case Study C)
- Paws in Jobland – a careers education resource targeted at primary schools (Case Study I)
- mini enterprise activities (Case Study G)
- hosting a theatre group who ran a day-long event looking at the world of work (Case Study G)
- a construction day for disapplying Year 10 students working with Year 6 pupils from two primary schools (Case Study C)
- writers' workshops in primary schools (Case Study H)
- Make it Real/Real Game (Case Studies D and I)
- ICT project week in Years 7 and 8 (Case Study G).

In a few cases, schools had developed a range of co-ordinated activities, across Year groups, but this was not the rule. Most focused on particular year groups *eg* Years 5, 6, 7 and 9.

In some of the pilots it was acknowledged that there had been too much emphasis on using 'off-the-shelf' projects – partly because of the need to get going quickly after a late start. For instance, in Case Study C in the second year, more time was spent with schools identifying their needs and tailoring activities to meet them.

Through the efforts of the brokers, many of the pilots (*eg* Case Studies A, C, D, F, G and I) reported a significant increase in the amount of EBL activity in both primary schools, often from a zero base, and in secondary schools. In the senior schools, increased activity was often associated with a greater emphasis on work-related learning, particularly for less academic and/or disapplying

students. This reflects a general policy shift in this direction. While the impetus is therefore outside the pilots, the brokers were reported to play a significant role in facilitating the development of EBL activity in this regard.

2.3 Work experience

Experimenting with ways of improving work experience was a specified objective in only a few of the pilots (Case Studies H and G) although some work took place over the two years in others (Case Studies B, C, D and E). Initiatives in the area of work experience tended to concentrate on improved preparation and, to a lesser extent, enhancing the quality of placements.

2.3.1 Improved preparation

In three areas, schools successfully participated in different events as part of their work experience preparation programme.

- in one area (Case Study C), in the first year, all Year 10 students at the two secondary schools took part in a one-day work experience preparation at their local Premier League Football Club. This was generally felt by all concerned to be very successful and a much larger operation involving many more students than anything previously organised
- in another area (Case Study G), a theatre group visited secondary schools in the two areas covered in the two years of the pilot, and worked with all the Year 10 students with an emphasis on making realistic choices and the importance of completing the work experience diary. The project attracted extremely favourable feedback from staff and students. However, the activity is relatively expensive and although favourably received, schools did not feel able to fund it themselves in future years
- in Case Study B, all Year 10 students in the one secondary school involved went on a two-day residential event involving work experience activity focusing on the food industry
- in Case Study A, Year 9 students in the special school were 'buddied' with a Year 11 student on work experience. This was judged to be successful in helping overcome the younger students' trepidation of going on a placement
- in one of the sub-clusters in Case Study E, the secondary school developed a programme of work shadowing to help prepare students for work experience and develop key skills. However, in Case Study B, a plan to re-introduce work shadowing for Year 9 students had to be abandoned because of a long-term absence of a key teacher.

2.3.2 Quality of placements

In two other areas, the focus was on the quality of the placements themselves. The primary schools in one area (Case Study H) developed joint guidelines on the provision of placements to ensure that secondary school students have a valuable experience when on placement in a primary school (although this has yet to be tested). In others, teacher placements were used to increase the quality, as well as the quantity, of placements available for students in a large local employer (eg Case Study G).

2.3.3 Management of the programme

In Case Study D the broker worked with the work experience co-ordinator to produce a document setting out the aims and objectives of work experience, how it is to be delivered, responsibilities within and outside school for ensuring effective delivery.

2.4 Teacher placements

Teacher placements featured in a number of the pilots' plans, although they formed a major element in only four areas (Case Studies A, B, F and G). Generally, involvement in the initiatives led to:

- a greater number of placements taking place, with placements happening for the first time in some schools, although many lasted only one day or less
- better relationships between schools and some local employers
- closer links being made between placements and curriculum and/or EBL development, and
- in one area, better use of the lessons learnt on placements through post-placement reflection and review.

It would appear that many, of the placements were largely instrumental, in that they served as a means to the end of developing further EBL activities, eg workplace student visits, curriculum projects/materials or work experience placements.

Examples of the pilots' activities include:

- in one cluster (Case Study A), the number of teacher placements was reported to have increased as a result of funding the time to plan, prepare and review. This was reported to have enabled the teachers concerned to maximise their value to the curriculum and use them to further other EBL activity. Most of the placements tended to be short – half or one day in length. An example of the impact of the initiative is that at one of the primary schools in the cluster where there

was no previous tradition of placements, all six teachers had been out on a half-day placement

- in another area, involvement in the initiative led to an increase in the number of placements taking place (Case Study G). Placements in two secondary schools were specifically linked to improving the quality and quantity of work experience placement opportunities. The materials and contacts collected were shared with other secondary schools in the area. In the primary schools, placements were designed to enhance the curriculum. For instance, two teachers at one school went on a placement to the National Gallery to support the development of the whole school topic on art, which included learning about jobs in art and understanding art as an industry, *eg* with jobs in framing and galleries
- in a third cluster (Case Study B), in the first year, the broker spent a day with each of the six teachers in four of the primary schools who had been on a placement to work through with them how to extract the maximum value from their experience in their day-to-day classroom lessons. In the second year, the broker also helped plan the placement in some cases, including accompanying a teacher on their pre-placement preparatory visit to the workplace. In that case, it was agreed that the placement would take place over eight half days, rather than a block of four.

In Case Study F, demand for placements had improved significantly over the course of the pilot as teachers saw the benefits that could be accrued through professional development placements, for instance eight five-day placements were planned over the summer holiday (2002), partly encouraged by the payment of a £300 bursary. During the course of the pilot the placements were mostly linked to developing curriculum materials.

It is also worth noting that in at least two areas (*eg* Case Studies G and H) respondents pointed to promotions being gained partly, it was felt, on the back of their professional development placements and links to the pilot.

2.5 Business involvement

There is evidence that business involvement with the pilots has increased over the two years in two ways:

- an increase in the number of businesses involved with the schools
- the development of a more longer-term relationship or partnership (at least lasting the two years of the pilot) with a few employing organisations.

In addition, the quality of the involvement had improved through improved understanding and planning.

Most pilots reported that the number of employers involved with schools in the cluster (on non-work experience-related activities) had increased significantly. For instance, one area reported 13 extra employers involved, and another increased the levels of business involvement from three new partners in the first year, to 19 in the second and a third said that the number of employers involved had doubled.

In a number of areas (five), schools have developed significantly closer links with one or two local employers, as a result of their involvement with the broker, who helped to establish the initial contact and develop the relationship, and most of these relationships were sustained in the second year. In one case, the employer became an active member of the cluster, attending meetings *etc.* In most others, the employer and one of the schools began working on one particular project, and the relationship grew to envelop a range of activities involving different groups of staff and pupils. In a couple of the cases, the relationship developed from a placement by a teacher with the employer.

While some of these relationships are with organisations that have a proactive view on links with education, and therefore are almost looking to be involved, in others the employer had little or no involvement with such activities before.

Brokers also helped ensure that activities with employers were better planned, by working with the schools and employers and/or facilitating meetings between them and/or producing relevant background materials. In Case Study B, the broker had worked with schools to improve their approach to employers by clarifying what they wanted and why. This helped employers understand what was expected of them and plan their input.

2.6 Focus on key skills

One of the features of a number of the pilots was a growing concentration on key skill development. Although not in the original prospectus a significant proportion of the activities were aimed at either enhancing key skill development or serving as a vehicle for demonstrating and recording their possession. For example:

- in Case Study I a key skill achievement pack was developed by the broker among a sub-cluster of schools
- in Case Study H a keys skills conference was held in the first year one attended by two or three representatives from each of the participating schools. The conference introduced key skills and explored their application in the curriculum. This led to

improvements in the QCA history scheme of work to ensure it addressed key skills issues, and links between subject leaders to address key skills issues as part of pupil transition to the secondary school

- in another area (Case Study F) materials produced through the course of professional development placements all addressed key skills for Key Stages 1/2
- key skills also formed the focus of Key Stage 2/3 transition 'passports' in two areas resulting in greater Key skill achievement at primary level (Case Study I).

2.7 Outcomes

There were a number of benefits reported accruing to students, schools and employers as a result of the achievements in the pilots outlined above. Brokers and teachers reported that EBL activities were well received by young people they enjoyed their experiences and gained a range of outcomes including:

- **Improved transition** – a number of secondary schools reported that they felt that the outlook and confidence of the new Year 7 students had improved as a result of their involvement with joint secondary/primary activities in the previous years – although there was no objective evidence to corroborate their observations.

In one area the middle school reported better understanding of pupil needs as a result of the communication between first schools and the middle-school.

- **Key skill development** – key skills became an important focus for a number of the pilots (eg Case Studies H and I) during the course of the pilot – demonstrating how they attuned their approach to priorities in schools. As a result, primary and secondary schools reported that their pupils' key skills had been developed more rapidly and systematically as a result of the pilot.
- **Broadening pupils' horizons** – and increasing the relevance of their work in schools, and therefore their motivation and attainment (eg in Case Study B improvements in SATs results in two primary schools were attributed to EBL activity). One school head teacher (in Case Study D) attributed improvement in the Year 9 SAT results to pupils' increased engagement in school work and awareness of its relevance arising from EBL activity.
- **Improving pupils' self-esteem** – and raising their confidence (eg Case Study A), particularly among disaffected and disaffected pupils (eg Case Study C).

- **Enhanced awareness of the world of work** – in a number of areas (eg Case Study G) some schools and their pupils were involved in EBL activities for the first time so pupils (and in many cases teachers) gained better insights into the world outside school.

Most of the evidence on outcomes is qualitative although one school was able to show quantitative improvements in reading skills after students' involvement with a literacy project.

Schools also reported improvements in terms of the way they plan and prepare EBL activities. In one case respondents reported the curriculum to have been enriched through the development of better, more relevant materials. Also some individual teachers reported improved professional development and career progression resulting from involvement in a project that demonstrated a whole school and broad approach to education. Schools (including Special Schools) also benefited from improved status in the eyes of other schools and their local community.

Employers reported a number of benefits from being involved in pilot activities. As a result of broker interventions, activities were generally well-planned and employers knew what was expected of them and the point of the activity. From their own perspective, employers reported benefits in terms of staff development – eg EBL provided staff with opportunities to develop their presentational skills and understand their own business as well as direct business benefits in terms of publicity and marketing (eg Case Study B).

Education business link organisations also benefited from the project as they learnt how to engage schools and employers better, and develop models and ways of working with them (eg the development of a toolkit for working with schools in Case Study E).

2.8 Sustainability

A key question for this evaluation is the extent to which the changes brought about by the pilots are sustainable, *ie* whether they will continue beyond the immediate life of the pilots.

There are a number of ways of looking at this question, for instance:

- to what extent will schools themselves continue without the support available from the funding made available through the pilots?
- is there evidence that other funders have taken up ideas developed in the pilots?

- have the pilots disseminated their achievements in such a way that others can pick up and take on the ideas developed?

Below we consider each in turn.

In some areas (eg Case Studies B, D, H and G) participants reported that schools are now more 'primed' to develop EBL activities. Many who have been involved in the pilots have seen the potential benefits that can be accrued and are now more likely to apply for future funding in order to support EBL activity. In some pilot areas the policies developed and adopted by schools are likely to mean that EBL activity will be more likely to continue in future years (eg Case Studies B and D).

Broker dependency has been high across all the pilots. In most cases schools report that they would not have become involved or could not have achieved the outcomes without significant support from the broker. Although some activities were expected to be run in the coming year, having been established in the schools, many schools said that would like to be able to call on a broker eg 'if we come across a difficulty which would take time to sort out'. Others felt that they could not afford to run some of the activities without alternative funding and were looking at a number of potential sources, including parents (eg for transport costs).

The reliance on the broker was demonstrated in Case Studies G and H where the broker was withdrawn (in one case only partially) in Year 2. However, there is evidence in both these cases that had broker support been maintained schools would have been more likely to have continued their involvement in EBL activities and made further progress. As it was, there was a reduction in both the level and quality of involvement.

In a further area (Case Study F) several participants reported that if the broker had been withdrawn after the first year the cluster would not have continued. However, after two years of broker involvement it was reported that the cluster may continue to function albeit at a reduced level. This is thought to be as a result of the relationships that have been developed between participating schools that some participants would like to see maintained.

A number of the case studies had applied to other funding sources to continue some of the activities for instance from the local Education Business Links Organisation and the Learning and Skills Council Standards Fund (Case Study A), Single Regeneration Budget funding (Case Study B) and the Local Initiatives Fund (Case Study C).

2.8.1 Dissemination

Most pilots have (or intend to) disseminated outcomes, reports, features and findings from their pilots through EBP/EBLO newsletters at a local and regional level. Other forms of dissemination include:

- cluster newsletters (*eg* Case Studies B and C - which was produced by a team of pupils from Year 9 with a team of Year 6's)
- several clusters (*eg* Case Study G) used celebration events/conferences in order to both disseminate findings and report on achievements
- 'road shows' (*eg* Case Study E) to disseminate both outcomes and features of the process to other parties in the region
- web site design (Case Study F) where schools in the cluster were provided with training to develop their own websites. These were all linked to incorporate a cluster site within a local network
- EBP website (Case Study I)
- presentation at a national EBP conference (Case Study C).

3. Sources of Added Value

The previous chapter looked at the achievements made by the pilots, *ie* their outputs. In this chapter we look at the other side of the equation, at the inputs, to see if we can identify which were the most effective in terms of generating the most additional value. We look at the benefits from the broker, from clustering and from the funding made available to schools.

3.1 The broker

A general conclusion of this evaluation is that the broker has been crucial to the success of the pilots, although across the nine pilots, the role of the broker was structured and resourced in different ways and the broker performed a number of roles.

3.1.1 Broker models

The way in which the pilots deployed the broker varied between two general models:

- **stand alone** – individual specially appointed broker working largely on their own (Case Studies B, C, D, E and G [second year])
- **split** – two or more individuals in a job share and/or taking forward elements of the broker role between them (*eg* one working with primary schools another on teacher placements *etc.*) (Case Studies A, F, G [first year], H and I).

In some of the pilots, the ‘broker’ role was a part-time one (varying between one and three days a week) or was an additional responsibility on top of other, related, tasks (*eg* Case Studies A or G [second year]). In others, the broker was full time (*eg* Case Study C). In a number of areas (*eg* Case Studies B and C), a new person took over the role of broker in the second year.

3.1.2 Roles

At the end of the first year of the evaluation, five distinct roles undertaken by the broker were identified:

- **strategist/visionary** – providing the vision – building understanding – developing a common language – developing shared values – being proactive – seeking ways of influencing behaviour among partner schools and employers
- **auditor/evaluator** – most brokers also spent time auditing current EBL provision in schools, quality assuring policies and practices and evaluating or helping to evaluate new activities
- **developer/initiator** – developing new ideas – ensuring that there is no reinvention of wheels – trying ideas and projects not previously considered – ‘writing the first piece of paper’ – solving problems
- **co-ordinator/facilitator** – drawing together – making sense of, and bringing coherence to, the various funding strands’ initiatives and policies – avoiding duplication – helping schools work together – supplying contacts, ideas, partners *etc.* – acting as a channel/filter/gateway – making links
- **resource centre/spadeworker** – providing materials – providing time to make telephone calls and write letters – supplying contacts.

To a greater or lesser extent, brokers played all of these roles. However, the key distinction appears to be between a **strategic** role and a more **operational** role.

The former generally ranged from persuading schools of the value of EBL activities, through auditing existing activities and identifying opportunities to developing materials, processes and procedures for schools to use on their own. The more operational or facilitative role involved making contacts and forging relationships, helping initiate projects and/or participating in activities. In addition to the operational role many respondents highlighted the crucial importance of administrative support provided by the broker.

In a number of the case studies the role of the broker developed over the two years (most clearly in Case Study B, but in others as well). In Year 1 the broker was more engaged in a strategic role – *ie* persuading schools of the relevance and importance of EBL activity, auditing school involvement and helping them to identify gaps in provision and generate ideas and projects to complement the curriculum and school needs. Later in Year 1 and in Year 2 more emphasis was placed on supporting individual projects, making contacts and ensuring that projects were developed with quality processes. As schools gained in confidence and repeated activities in one or two cases the broker was then seen to assume a more administrative support role.

3.1.3 Value

There was a general consensus among the schools and other partners involved in each of the clusters that without the support of the broker, the amount of EBL activity, and its quality, would have been much reduced. The key aspects of value that brokers brought to the clusters were:

- *expertise* – eg to advise at a number of levels from the development of work-related learning policies to how best design an individual activity
- *time* – to plan and organise activities
- *contacts* – with employers, other schools, or other sources of help or expertise.

Key skills for effective brokering

In the course of the study the following skills were observed as being critical to enable a broker(s) to fulfil their responsibilities.

Knowledge and understanding

- An understanding of how schools operate and how EBL activities could help in delivering the curriculum.
- The ability to relate to a wide range of businesses, to understand how they operate and how to secure their involvement.

Technical skills

- Communication skills — to make presentations, chair meetings, write letters and funding submissions, talk to school children.
- The ability to innovate and take new ideas to practical fruition.
- Administrative competence — to organise meetings, write letters.
- Project management — to conceive, design, plan, manage and deliver projects to agreed standards of quality and delivery.

Personal attributes

- Enthusiasm and able to transmit that enthusiasm to others.
- Persistence — eg in terms of securing commitment and chasing progress.
- Persuasiveness — to 'sell' the value of participating in EBL activities.

Most of the brokers exhibited some if not all of these skills, although in some clusters they may have been embodied in more than one person, where they operated a 'split broker' model.

There was evidence from some of the schools that once they had been introduced to EBL activities and had a framework within which to work, and had developed their confidence about planning and undertaking EBL activity, they may become less dependent on the broker. However, many still relied on broker expertise and particularly time, eg in raising interest among

businesses (see section 2.7) or depended on the broker to overcome problems.

3.2 Clusters

As described in Chapter 1 (and can be seen in the nine case study reports in the Appendix), there were four different cluster structures operating across the nine areas. They also varied in the way they operated, for instance whether they met as a whole group, *eg* on a termly basis, or whether schools within the cluster met 'as and when' for particular purposes or projects.

Although schools reported that cluster meetings provided a useful focus for the pilot, as well as a valuable way of sharing experiences *etc.*, and some found the 'peer group pressure' of having to report back a useful spur to action, other commitments often made attendance difficult. Some clusters met after 4pm or in the early morning to overcome these problems.

In some of the areas, there was evidence of fewer cluster-wide meetings in the second year (*eg* Case Study B). While, in others (*eg* Case Study F), there was evidence of a momentum building up within the cluster as initial barriers to joint working were overcome and more meetings were held in Year 2. However, it was felt there is a 'threshold' in terms of the number of meetings, beyond which schools would feel overburdened and this threshold was being approached.

3.2.1 Value

The key points of value from grouping together of schools in clusters appear to be:

- the sharing of ideas and resources – *eg* using the same materials as a basis for activities, swapping draft school policies on EBL, sharing contacts with employers. Some of our interviewees thought that there was even more scope for such mutual support than had been realised during the course of the pilots
- sharing experiences and knowledge – *eg* about what works and what does not, the difficulties or triumphs associated with EBL activity in schools
- maintaining a momentum – and in some cases an almost competitive spirit among schools to deliver on their project plans
- mutual support between schools – in one cluster schools came to demonstrate the pilot for a middle school in its OfStEd inspection and, it was felt, as a result it achieved a good assessment

- improving awareness of pupil needs and transition where schools are communicating more fully
- raising teachers' self-esteem and motivation – for instance one of the schools in the cluster in Case Study A was a special school where the self-esteem of the staff was raised by their involvement in the pilots.

Critical success factors for clusters

Size — smaller clusters were very dependent on commitment from everyone, whereas larger clusters could survive if one or two schools were unable to participate fully. However, large clusters reported a lack of team spirit. In one area (Case Study A), the size of the cluster doubled in the second year, which reduced the time the broker could spend with each school and made organising meetings *etc.* across the cluster unwieldy. The conclusion from this area is that the most effective cluster size is around four to six (*ie* a secondary school and its feeder primaries). In other areas, a slightly larger size, *eg* six to ten schools, was felt to be the optimum size.

Stage of development — one of the initial aims of the pilot initiative was for well-advanced 'exemplar' schools to partner up with those with a less active engagement with EBL activities. While this only happened in some areas, there was little evidence of effective relationships developing where it did. Indeed, the balance of evidence is that the most effective clusters are those where the schools are not too far apart in terms of their understanding or experience of EBL activity.

Geography — schools in close proximity to each other generally found it easier to build relationships by attending meetings at each other's premises and taking part in joint activities *etc.* In the first year, we concluded that this tended to mean that clusters in urban areas were at least easier to organise, if not more effective than those in rural areas. However, Case Study F demonstrated that the sustained commitment from a broker could overcome geographical constraints, especially where there were additional reasons bringing the schools together.

Commitment — school participants need to be committed both to the principle of EBL activity as a key element of the wider curriculum and to the concept of sharing ideas and practice for clusters to work effectively. Commitment needs to be at all levels and particularly among senior managers and those involved in day-to-day link activity. Schools in active competition for potential pupils were felt to be less likely to work together than those with separate catchment areas.

Rationale and history — the stronger the rationale for the cluster the better. It was apparent that EBL activities 'on their own' were generally an insufficient bond to ensure that a cluster would work well together. Where there was an additional rationale or a history of working together the clusters appeared to be more effective.

However, the benefits of being involved in a cluster varied. The most beneficial relationships appeared to be between secondary and primary schools and (to a lesser extent) between primary schools rather than between the secondaries. In the five pilots with

more than one secondary school, there was evidence of limited sharing of contacts and information between the schools. However, in only two cases had an effective relationship between the two senior schools developed, *eg* in terms of delivering joint activities.

Many of the activities within the schools were undertaken individually, albeit with the benefit of sharing experiences and ideas, with the notable exception of transition-based work between primary and secondary schools, where the activities were planned and delivered jointly.

3.3 Funding to schools

Many of the pilots devolved some of the funding direct to schools (*eg* Case Studies H and I) and all used an element of the funding to finance particular activities or support the cluster.

The funding was particularly important in financing supply cover for teachers to both engage in EBL activity – from professional development placements, to attending cluster meetings and participate in cluster meetings.

Funding was reported to have had a proportionally more significant effect at primary level, where there is little discretionary funding to support EBL-type activities.

However, at secondary level, the funding was less important and, for instance, in one cluster it was not clear that the money allocated to secondary schools had translated into a step change in EBL activity. Other elements of the package, particularly the time or expertise of the broker, were reported to be a more effective use of resources in terms of achieving change.

3.4 Sustainability

The general feeling among our interviewees was that few of the clusters were self-sustaining, beyond the life of the pilot. This reflects the crucial role of the broker in maintaining the clusters, *eg* setting agendas, calling meetings, keeping abreast of developments elsewhere and maintaining attention on the EBL agenda. Although clusters built around established relationships (*eg* between secondary schools and their primary feeders, for example Case Study I) might continue to meet, the focus on EBL could be lost without the presence of the broker.

In some of the areas (*eg* Case Studies A, B, D and I), the principle of clustering supported by a broker will be maintained and/or extended in future years (*eg* through funding from the EBLO). However, broker resources will be spread over a greater number of schools.

4. Factors Affecting Success

A range of factors influenced the success of the nine pilots. Most of the constraints affected schools ability or willingness to play a full role in the clusters, although respondents also identified some employer based issues.

Also in the chapter we briefly consider the lessons emerging about how the initiative as a whole was designed and managed including our own role as external evaluators.

4.1.1 School-based constraints

The most important issue that constrained schools' engagement with the pilots were the pressures of the curriculum (from Key Stage 2 onwards), SATs and other initiatives (*eg* on ICT) which tended to divert attention away from EBL-type activities. Although the brokers and the clusters did appear to 'open the eyes' of some schools as to what could be done through EBL activity, *eg* in terms of delivering the mainstream curriculum, other areas generally had priority. EBL activities seemed to attract most attention when they served as a means to other ends, *eg* helping to cement relationships between a secondary school and its feeder primary schools, as a means of demonstrating key skills or helping to provide evidence for an application for specialist college status.

A related issue concerned securing both senior management and operational involvement in schools – both in principle and in practice. In some cases nominal agreement to being involved was not followed up by sufficient priority being given to EBL work in schools or ensuring the availability of teachers to take the lead. In some of the schools the absence of the lead teacher responsible for EBL-type work severely limited the ability of the schools to participate in the pilots (*eg* Case Studies A and B). In Case Study H it was felt that an inappropriate teacher acted as the link so objectives for the pilot were not tied to school objectives. In a couple of other cases, teachers acting as the link were clearly overburdened and unable to devote sufficient time to the project.

Other school-based constraints included:

- initiative fatigue – *eg* in terms of developing bids for European funding or specialist status or working on EAZ or other initiatives could all distract teaching staff from engaging with EBL activities
- Special Measures – some of the schools were under Special Measures during the course of the pilot indeed one or two were selected on the grounds that EBL activities could help them improve. However the focus on mainstream achievement meant that their attention was elsewhere and they did not give pilot activity priority
- competition between schools, which could limit the degree to which they were willing to work together as they looked to differentiate themselves
- the lack of familiarity with EBL activity among teachers *eg* in primary schools which meant that the broker had a lot of initial work to do explaining what could be done and how
- teacher supply issues – particularly in terms of finding supply teachers of sufficient calibre to take the classes of teachers involved in planning EBL activity. Teachers were reluctant to reduce the contact time they had with pupils given the pressures to achieve
- the cycle of topic work in primary schools limited the opportunities to repeat projects every year. This meant that new projects had to be developed and continuity was lost.

4.1.2 Employer-based constraints

Some of the pilots were concerned about dependency on a few key individuals within a business for the partnership with a school or schools to be maintained. When they moved on the relationship tended to founder. One cluster had considered ways of embedding working with schools more firmly within the ways employers work, *eg* by writing it into the key job descriptions or encouraging employers to adopt EBL policies. However they had failed to make any major progress on either front.

In the main though participants felt that once appropriate contact was made employers were willing to participate.

4.2 Management of the pilots

In this section we review the way the pilots were originally designed and managed and our own role as external evaluators to draw out some of the lessons that can be learned.

4.2.1 Initial design

The initial remit for the projects appeared to reflect a number of policy ideas, *eg* on progression of EBL activities ‘from an early

age', improving work experience, extending personal development placements. Each of the bids that were accepted covered some but not all of these points which meant that they tended to have different agendas.

Second the pilots were generally structured differently involving different combinations of primary and secondary schools – and in some cases middle and upper schools and Special Schools.

A third point affecting some of the pilots to a greater degree than others was the short notice that they had to set up the initiative. This meant that some missed an important opportunity to get involved with schools from the start of the September term, or even better before then, to influence the planning for the coming year (eg Case Studies B and C). Some participants reported that for activities to be linked to the curriculum projects need to be planned the year prior to the activity. In this respect a two year pilot was felt to be better than one.

Once up and running all of the pilots established workplans which varied in format between the areas but served as a useful focus to guide and stimulate activity. Most had some form of management group which steered the pilots, under the direction of the local EBP – or in one case Connexions – although in at least one case the management group meetings gradually lapsed over the two years. With one or two exceptions, there appeared to be little active involvement of either the Government Offices or the DfES in influencing how the pilots developed, although in many cases Government Offices were represented on the management groups. At Government Office level this was partly due to staff changes, indeed in one case the Government Office contact changed five times over the course of the two years.

Whether more active management would have influenced the course of the pilots is unclear, however it is noticeable that some subtly changed their focus during the course of the pilots, often to meet the demands of their schools. In some cases this led the pilots towards new areas of attention and objectives, eg key skill development, which although highly relevant were not part of the original remit. Others became more activity-driven than objective-led. Again this introduced an element of variability in the operation and limited the degree to which some of the original policy ideas (eg developing professional development teacher placements) have been tested.

The combined effects of these points is that the nine pilots as a whole tended to have different start points and to an extent move off in different directions. In terms of evaluation it has made comparison more difficult. It is easier to isolate and even quantify the effect of one policy change if as many of the other variables as possible are held constant, both in terms of design and delivery.

However the 'bottom-up' approach has enabled the pilots to focus on the problems or issues that schools want to address – such as key skill development or motivating disaffected pupils or activities in primary schools – rather than solutions that the Department or others may have wanted to explore. It was argued by some brokers that to maintain school commitment it is important to undertake activity which meets school needs.

External evaluation

There are lessons also for the design and process of the external evaluation in which we have been engaged. The expressed purpose of the national evaluation was to examine the effect of the initiative as a whole, rather than the individual pilots. Although we were able to give (limited) advice on local evaluation it was not the intention to do it – although the data we gained in the course of our work could obviously be used to inform local management. With hindsight this distinction was unclear and provoked a degree of confusion and in some cases difficulties.

A further complication arose over whether the evaluation was formative or summative (*ie* whether it was designed to influence the process as it went along or judge the value of the process at the end). This led to some confusion *eg* over the organisation and role of workshops. Again with hindsight further clarification from the outset could have helped, perhaps by setting and limiting the questions being addressed by the original framework

Some other policy pilots operate differently. For example, the evaluation of adult guidance pilots has a clear separation of roles between the DfES (the policy sponsor) and three separate agencies involved in:

- helping manage and administer the projects – to ensure they fulfil the goals set or them
- designing and implementing a management information system
- evaluating the pilot outcomes.

This means there is a clear separation between those involved in helping the projects get to where they want to go, those involved in telling the projects how they are getting on and those involved in judging whether it was worth making the journey in the first place.

5. Conclusions: The Main Lessons from the Pilots

In this final chapter we sum up the main achievements of the pilots against our original evaluation framework and identify the main lessons we can draw from the two year initiative.

5.1 What have the pilots achieved?

There was a wide variation of outputs across the nine pilots. In the preceding Chapters we have identified the following achievements, against the main elements of the evaluation framework, although it should be noted that no one pilot area achieved all the results outlined below:

- **The quality of education business link activity** – we found that the quality of EBL activity in most of the schools involved with the clusters had improved during the course of the pilot and in particular there was evidence of:
 - **Progress from Key Stages 2 to 3:** there appears to have been a large amount of new activity generated in the clusters focussed on maximising the chances of children making a smooth transition to secondary school. As a result there was not only a considerable increase in the volume of activity at primary level but also greater attention given to transition issues and progression between Key Stages 2 and 3. In turn this led to better links between primary and secondary schools at that level, *ie* teachers having a better understanding of the pupils and what they have done/will do pre and post transition. Teachers also reported that pupils entering secondary school were better motivated and prepared.
 - **Progress from Key Stages 3 to 4** – less attention appears to have been given to activities in senior school and most of the work appears to be in terms of auditing and planning. No school developed a co-ordinated approach to EBL across Years 7 to 11 during the course of the pilot, although many appeared to have made progress towards this end. The constraints at this level in terms of availability of in-school resources, the limited ability of a few teachers to make a difference and the importance of

the mainstream curriculum and GCSEs proved to be significant barriers.

- **Planning** – where activities were undertaken, there was considerable evidence that they were planned with clear learning objectives and links to the curriculum.
- **Management of EBL in schools** – most of the schools became more interested in and aware of the benefits that EBL activities could provide. In a few cases school policies on EBL activity were created and development plans gave greater prominence to EBL activity. However in other cases it is not clear that greater commitment and interest will continue to be translated into activity without the support of the broker to maintain momentum, as other calls on teacher time and attention take hold. In some cases schools became more willing to share ideas, particularly at primary level.
- **General EBL activity** – generally more attention appears to have been paid to EBL activity in the schools involved in the clusters than would otherwise have been the case – particularly in primary schools. It is likely that some activities will continue beyond the life of the pilots, but not at the same volume.
- **Work experience** – few of the pilots concentrated on this area of activity. Those that did focussed on improved preparation and, to an extent, better quality of placements. While both are important and some of the preparation events were reported to be extremely successful and motivational, neither amount to major innovations in the provision of placements.
- **Teacher placements** – again only a feature in a minority of pilots. However, involvement does seem to have brought about both an increase in placement activity (with some schools taking part in placements for the first time) and a greater focus on the placement in terms of building links with the general curriculum. The latter led to spin-offs in terms of other EBL activities (such as projects or work experience). However most placements were short in length – one or even half a day (arguably too short to make a significant difference). Placements therefore tended to be fairly instrumental in their aims (eg to secure better work experience placements or to organise a particular curriculum project), ie a means to the end of securing more EBL activity rather than ‘continuous professional activity’ in the human resource development sense. It is clear that placements are highly dependent on external funding (for supply cover) and support (to broker the arrangement).
- **Relationships with employers** – there is evidence of schools building a larger number of and in some cases more effective and longer-term relationships with local employers. Although the total number of such ‘partnerships’ is fewer than the

number of clusters, their success has provided a model and inspiration for more to be developed in the future.

5.2 What are the main messages from the pilots?

We have identified ten main messages to emerge from the pilots which will have a range of implications for policy and practice in this area.

1. **Brokers help improve education business link activity.** The evidence from the pilots is that effective brokers can work with schools and employers to bring about both more and better EBL activities with clear and relevant learning objectives which support the delivery of many aspects of the curriculum. Without the support of a broker it is unlikely that these results would have been achieved. We therefore conclude that brokers are crucial to bringing about a higher level of EBL activity.
2. **Brokering is more important than clustering.** The single most effective input in the pilots was the broker without whom few of the successes in terms of improved EBL activity would have been achieved. While working with a number of linked schools helped focus brokers' input, clustering schools together on their own, without a broker, would not have achieved the same results.
3. **Clustering can work, but only in the right circumstances.** Clusters of schools work best when there is a strong rationale for schools working together, in addition to EBL activity. EBL is not a strong enough glue to bind a cluster together on its own. It takes time and effort for schools to build effective collaborative relationships. It is much easier to do this when they are not in direct competition for intake, situated in a geographically coherent area and have a similar commitment and approach to EBL activity and work-related learning in general. In these circumstances, collaborative working between schools, especially between a secondary school and its feeder primaries can take off.
4. **EBL is generally viewed as a marginal activity.** There are many demands placed on schools' time and few place priority on EBL activity. Within schools, EBL is generally the responsibility of a very few teachers who often have many other responsibilities and it rarely features in school policy documents or development plans. Many schools think that EBL is only naturally relevant to a minority of pupils and is not mainstream.
5. **Winning schools to the relevance of EBL takes sustained input and evidence.** It can take considerable effort over a sustained period for schools to see the relevance of, and feel confident in, undertaking EBL activities. Senior management support is critically important, backed up by operational

resources throughout the school. To achieve this brokers need to provide a sustained effort and be able to demonstrate the effectiveness of EBL activities on student outcomes. Even when working with committed schools the evidence is that brokerage support is required over the longer-term to sustain momentum.

6. **EBL activity requires funding.** Few schools have the financial resources to undertake high levels of EBL activity on their own. External funding is required to release teacher time and to provide materials and other resources and to pay direct costs such as travel.
7. **EBL can achieve results.** Although not a focus of this study, we did find some evidence from schools that involvement in EBL activities improved pupils' motivation and confidence and, at least four cases, contributed to better academic results.
8. **Effective brokering requires a range of skills and approaches.** Effective brokers worked at a number of levels, operating strategically to win over hearts and minds, operationally to help design and organise activities and develop relationships between schools and employers and administratively to service and maintain those activities and relationships.
9. **Brokers provide the time and expertise lacking in schools.** The key assets that brokers have at their disposal is their expertise and knowledge about what activities could be undertaken and how, and the time to help organise them. Lack of time and access to administrative resource is a major constraint on even the most committed school.
10. **Customised support is more effective than pre-conceived activities.** The activities which work best are those that are tailored to schools' and pupils' needs, rather than off-the-shelf designs. This requires considerable planning as well as access to expertise and resources to design and implement effective activities. Even standardised approaches such as work experience placements and professional development placements for teachers can work best when adapted to meet the needs of the schools and pupils concerned.

5.3 The way forward?

Finally, what does this evaluation tell us about the future development of education business link activity?

Although teachers and pupils report that EBL activity is fun, well received by participants and can result in better motivated and ultimately better qualified young people, there is a lot of effort involved in developing and sustaining good quality links and activities. EBL will tend to drift to the edges of the school agenda unless:

- **it is given higher priority** *eg* by ensuring that all those who influence the direction of schools are ‘singing from the same hymn sheet’. For instance this means ensuring that all aspects of education policy take full account of the potential benefits education business links can offer. At an operational level it involves ensuring that trainee teachers learn the value of EBL and work-related learning and when and how it can be effective. It also means that a school’s approach to EBL and community partnership should consistently form a part of OfStEd inspections and other means of judging school performance
- **it is consistently funded.** Without additional funding schools, especially primary schools will be deterred from EBL activity. For EBL activity to become more mainstream funding needs to be long-term. Having to apply for funding from various competitive sources is time-consuming and can merely favour the professional bidder rather than those with either the greatest need or ability to deliver. However not all schools want to or can participate in EBL activities. Funding alone will not generate activity and certainly not lead to better quality activity. It is better to focus resources on where they can make the greatest difference rather than distribute them equally regardless of need, interest or ability to deliver
- **it is supported by expert brokers** – the clearest message from this exercise is a simple one – if you want more and better EBL activity then you need to support brokers to facilitate it. Without brokers EBL activity can often be unsustainable. This is not because it does not have value. Rather it is that the process of developing and sustaining relationships between employers and schools requires resources and expertise generally unavailable in businesses or schools.

Another message for national policy-makers is that collaboration between schools can also be difficult to sustain without either a strong rationale for linking together or brokerage-type support or other means of bonding. Combining two of these thoughts together could, for example, lead to schools only being funded for certain EBL activity if they actively participate in a cluster.

A further implication of the study is the importance of providing flexibility in the form of the funding and provision available at local level. ‘Off-the shelf’ products can be useful as a means of quickly moving forward from a zero base, but it is clear that schools and employers, and ultimately the young people, benefit most from activities that fit their needs, *ie* that activities should be demand rather than supply-led. This means that not all young people need the same. Therefore general entitlements may not be appropriate, whereas the ability to provide a customised service, *eg* through a broker, may be far more effective.

Appendix 1: The Case Studies

Case Study A

Background

This pilot was situated on the edge of a major conurbation. In the first year there were four schools involved, two secondaries (one mainstream, one special) and two primaries (also one mainstream and one special). The pilot was expanded for the second year to include all but one of the ten primaries which feed the two secondaries. The cluster was expanded primarily to spread good practice.

The project was managed by the local EBP Director. The broker's input was a mix of strategic (outlining the vision, securing commitment, chairing cluster meetings, negotiating *etc.*) and operational (helping/enabling schools to get things off the ground, identifying businesses, 'hands-on' participation in activities *etc.*). The EBP Director provided a substantial proportion of her time to the strategic role in the pilot, while the operational role was carried out by a teacher from the special secondary school, plus another individual working mainly with the primaries, both one day per week. The pilot also funded part of the time of an EBP employee (effectively two days spread throughout the week) to provide separate administrative support to the project.

Objectives

These were described in the action plan for the first year as:

- increased numbers going on, and shared and improved practice on, Teacher Placements/Professional Development Placements
- establish progression of education business links (EBL) from Key Stage 1 to Key Stage 4
- increased EBL links between primaries and secondaries
- increased number of employers involved with the schools
- more teachers to be 'tuned in' to EBL, especially in the mainstream primary
- formalise EBL policy and arrangements, especially in special primary

- improve sustainability.

These objectives were collapsed for the second year into two broad aims:

- to demonstrate that coherent and progressive work-related learning helps schools in raising standards by providing opportunities to enhance and improve pupil motivation, achievement and key skills through experiences of the world of work for the 5-16 age ranges, in particular through enterprise education and maths challenges
- to demonstrate that effectively supported teacher placement opportunities impact positively on the development of the curriculum and the quality of teaching and learning by providing Professional Development Placements (PDP) linked to curriculum and/or professional development.

The aims were then translated into a number of more specific objectives, *eg* each school undertakes an 'enterprise education' activity within at least one Key Stage, including visits to and by employers, with each primary school to be given the opportunity to engage in the national 'Young Primary Enterprise' pilot initiative.

Main activities

Well-attended half-termly, half-day cluster meetings shared experiences, and a planning day was also held each term, *eg* to plan an event during the Summer term when all the schools in the cluster took part in a joint enterprise-based activity. The costs of supply to cover for attendance at the meetings were paid by the project.

The schools involved in the pilot took part in a large number and wide range of education business link activities, too numerous to detail here but including:

- each mainstream primary school took part in the 'Maths Challenge' activity for Key Stage 2 pupils, in which the lead was taken by the mainstream secondary school, which linked with a major employer to generate relevant Maths activities during which the Year 7s and older pupils 'buddied' the Year 6s
- there were a number of activities where pupils from a number of the primaries and the special secondary worked together, including an enterprise activity where Year 8s worked with Year 6, and the special secondary's enterprise week for Year 10/11s which included some working with pupils from the primaries
- the broker negotiated and supported the implementation of at least one PDP for each school, each placement being linked to

curriculum and/or professional development, and supported by an action plan and project report outlining teaching and learning outcomes

- all pupils in Key Stages 1-3 had 'EBL diaries', based on the Key Stage 4 work experience diary, which described their EBL experiences and their learning which it was intended they would take with them through the different Key Stages – the diaries have a section which asked the pupils to identify which key skills were involved in an EBL activity
- in most of the primary schools, the EBL activity had been restricted to one or two year groups, but it was clearly the intention in most cases, given adequate time, resources and support to spread the activity to other year groups over time.

Constraints

The main factors which constrained the degree of progress which could be made were:

- the pressures of the curriculum, SATs *etc.*, and the time which needed to be devoted to other initiatives in school, which, even though the value of EBL activity to students was appreciated, hindered full participation in cluster activity
- the pressure on schools to achieve results also showed itself in a reluctance on the part of some class teachers to leave their classes in order to go on PDPs, attend planning meetings *etc.*
- business involvement too often depended on a particular individual so that there can be a drop-off in interest when people move on
- in one of the schools in the pilot, the main cluster contact had been ill for some time and the school's participation had reduced
- a significant constraint to making faster progress had simply been the lack of familiarity on the part of teachers of EBL and how they can be linked effectively to curriculum requirements. It was believed that the best way of overcoming this constraint was to get teachers out of the classroom, talking to others and sharing good practice
- competition for pupils was identified as a constraint by a couple of primary schools, but attending cluster meetings had reduced the force of that
- cases were reported of head offices of national companies not allowing school visits *etc.* to local branches, even where local staff were keen.

Dissemination and sustainability

The pilot took a number of steps to keep other interested parties informed of what was happening, including production by the Year 10 students at the special secondary school of a termly cluster newsletter describing activity, successes *etc.* at the cluster schools. It was issued to all pupils and teachers at the schools, to the employers involved with the cluster, and to local EBPs, LEA inspectors/advisers and the National EBP Network. In addition, a post-graduate student was funded to produce a CD-ROM which has been made widely available to EBPs *etc.* in the region.

The EBP Director has addressed gatherings of schools and educationalists about the pilot and its successes. Because of its experience during the pilot in providing visible examples of how schools can collaborate at a practical level, the EBP has won a bid for an inclusion/collaboration project involving four local secondary schools. Further dissemination of the good practice developed in the pilot has been made by LEA school advisers.

All of the schools involved in the cluster have agreed that they want to keep the cluster group together, and the EBP hopes to be able to use funding from the EBLO to support some of the activities. Funding from the local EBLO will be used to pay for a broker to work with schools, but the number of schools involved will be much larger than the existing cluster. Moreover, there will not be the same level of funds to provide to individual schools to cover transport costs *etc.*, or to pay for supply cover for as many cluster meetings, or to cover for teachers going on TPs. EBP funds will be used to pay for one or two half-day cluster meetings. A number of schools said some links could continue with the aid of parental contributions to cover costs of transport *etc.* It was hoped from an early stage that the focus on PDPs, 'Young Primary Enterprise' and the 'Maths Challenge' would help embed the activities so that they would continue when pilot funding ended, and this strategy appears to have been successful.

The LEA was impressed by the links established in the pilot and intend to promote EBL activity in primary schools and their role in transition to secondary school. Bids have been submitted to the Regional Development Agency on behalf of two 'feeder' clusters (in each case one secondary and four primaries) for funding to support each cluster in a Community Enterprise Awareness Project, modelled on the cluster pilot.

Value added

Since the pilot began, there have been varying, but significant, increases in EBL activity at Key Stage 1 and Key Stage 2 in all the primary schools, in most of them from a zero base. In a number of instances, this involved taking existing activities (*eg* a visit) and

looking at them afresh, and amending them to incorporate a 'world of work' dimension, where one previously did not exist. Before the pilot, there had been some EBL activity at Key Stage 3 in the special secondary school, but during the pilot the degree of activity was enhanced considerably. There was less of an impact on EBL activity at Key Stage 3 in the mainstream secondary school, where the main cluster contact went on long-term sick, significantly affecting the degree of progress made. Similarly, at Key Stage 4, there was a great deal happening at the special school but EBL activity was largely restricted to work experience in the mainstream school.

The quality of EBL activity has also improved. Each school has designated an EBL contact/co-ordinator and some of the schools have produced written EBL policies, or statements in their development plans, and others are working towards them. EBL activities are more clearly linked to curriculum requirements.

There was a significant increase in the number of Teacher Placements/PDPs. They tended to be relatively short, lasting a half or a full day, and to be more instrumental than developmental, focused on using them to identify other EBL activity for the school involved. Each school in the cluster was provided with funding to pay 1.5 days supply to cover the time required by the teacher to plan and prepare for the PDP, undertake the placement, and then to review the learning and its potential use in the classroom afterwards, helped by the primary broker. Thus, not only did numbers increase but there was also a shift in quality, giving PDPs a greater focus on maximising their value to the curriculum and on using them to further other EBL activity.

There were numerous examples of schools working together on EBL projects: primary-primary, primary-secondary and secondary-secondary.

The joint working between the special and mainstream schools has brought significant benefits to both teachers and pupils in both types of school, and the EBL linkages between the schools have eased more general interchange. The project has, for example, raised the status of the special secondary school in the eyes of the other schools, it has broken down misconceptions, and it has also had a very significant impact on the self esteem of pupils in the special schools. Thus, the project has helped the inclusion agenda. It has helped also the SEN pupils in the mainstream schools, primary and secondary, because it has facilitated and enriched their access to the curriculum.

There has been a sizeable increase, at least double, in the number of employers involved with schools in the cluster, and employer involvement has been mostly of a sustained rather than on-off nature.

The most valuable elements of the project were generally regarded as having been the funding of brokerage support with the requisite knowledge and skills, and the money which the project could provide to schools to pay for supply cover for TPs and for transport *etc.* However, the clustering itself had been very valuable, particularly the opportunity to regularly come together to listen to other schools share experiences/challenges *etc.* That networking was believed to have been vital, and was seen by some as even more important than the brokerage support, though it was recognised that it probably would not have happened without the broker to organise and service it. The most valuable aspects of the broker(s) role was said to have been the time they could devote to accessing employers/other agencies and progress chasing, plus their confidence and expertise in doing the detailed negotiation/planning/communicating/problem solving.

Broader outcomes include:

- contributing to broadening of pupils' horizons, increased their self confidence and self esteem, and improved their focus on learning
- providing visible examples of how schools can collaborate at a practical level
- providing feedback to businesses afterwards on what the school and the pupils had got out of their EBL activity with them. Among the benefits to businesses they identified were improved community profile, better recruitment, better understanding of their industry, and a sense of giving something back in return for all the help received by the business from government and agencies, *eg* with Investors in People which had made a big difference to the business.

Case Study B

Background

The schools taking part in this pilot were located on the edge of an industrial town. The cluster consisted of one secondary school plus its eight primary feeders in the first year. For the second year, the coverage was extended to include a second 'pyramid', comprising one secondary plus its ten primary feeders. The expansion was carried out in order to assess the impact on broker workload/ways of working in servicing a much larger number of schools, and to gauge the impact it would have on activity in the first cluster.

The broker was part-time (2.5 days per week in the first year and three days in the second), and had regular meetings to report progress and discuss issues arising with the relevant LEA Manager and Government Office Education Adviser. The broker also communicated frequently with an official from the LEA who worked with schools in developing their work-related curriculum with the aid of SRB funding.

A cluster working group was set up in Year 1 to share experiences, and was measurably well attended. The broker attended SRB work-related co-ordinators meetings which were a good forum for the cross-fertilisation of ideas. No working group was set up for the second year cluster.

Objectives

The objectives for the first year of the pilot were described as to:

- increase recognition of the contribution of EBL activity, especially in schools that have done little in the past, and widen the year groups involved
- encourage all schools to develop a whole school policy for EBL
- increase EBL contacts between schools, especially between the primaries and the secondary
- improve the quality and value added of Professional Development Placements

- develop strategies to promote sustainability beyond the pilot period.

The objectives were largely unchanged for the second year, though a key challenge identified for the second year was to increase the number of businesses involved with schools, as this aspect of the pilot had not been as successful as hoped in the first year. It was also intended that there should be more inter-action between schools in the second year.

Main activities

During the first year, the broker visited each school in the cluster, helping them to produce an audit of work-related learning provision, and to plan and clarify aims and objectives. He also produced an EBL 'toolkit' which included a model EBL policy document, a flowchart for planning EBL activity, sample letters to businesses *etc.* Schools found the 'toolkit' very useful in raising their confidence about planning and undertaking EBL activity.

Both of the pyramids within the pilot were already part of an SRB-funded work-related learning initiative in which all the schools in the local authority area would eventually be involved, with the primaries becoming fully involved on a 'roll-out' basis. The second pyramid was further down that road, and the schools in that pyramid when they joined the pilot had therefore done more planning in respect of EBL-related activity than the first 'cluster' pyramid had at the same stage in the first year. The focus of the broker in relation to the second cluster was therefore, to some extent, more on helping the schools translate their plans into action (though there was still some planning/commitment work to be done).

A group was set up within the secondary school to bring together all those involved in managing different aspects of work-related and similar activities (PSE, Careers Education and Guidance, Citizenship, work experience *etc.*). The broker also attended those meetings. However, that internal group did not meet after the school's co-ordinator went on long-term sick leave in January 2002. The secondary school in the second cluster already had an internal EBP (several teachers meeting regularly with two or three employers) which pre-dated the pilot.

In the primary schools in the first cluster, some year groups had had some exposure in the past to EBL activity, but others had had none. In order to ensure that more year groups were involved, the co-ordinator focused on the introduction into schools of 'Primary Enterprise', along with other activities such as the 'Technology Challenge'. As a result of the pilot, in one primary school, all year groups from reception to Year 6 had engaged in some EBL activity, whereas in others one or two year groups had been involved in EBL activity but the intention was, having learned

from that, to look at schemes of work (and the 'citizenship' requirements) to see where EBL could benefit other year groups and plan and organise accordingly, with outside help.

All pupils in the primary schools in both clusters began to use primary planners to aid the development of key skills and personal target setting, the importance of which had been reinforced when visiting businesses have brought their 'planners' along with them to demonstrate how important they are 'at work'.

It was the intention in the second year of the pilot to start addressing the gap at Key Stage 3 in the first secondary school, but this had not happened, largely because of the long-term absence of the EBL co-ordinator (there was a similar gap at Key Stage 3 in the other secondary also). Similarly, there had been a plan, which had not materialised, to re-introduce work shadowing for Year 9s as a preparation for work experience in the first secondary. However, all Year 10s had been out on visits by way of preparation and business people had come into the school to address them. The Year 10s, together with Year 12 pupils, also went on a two-day residential course for intensive work experience activity, looking at the food industry. In addition, the Year 12s had made factory visits which had given them a whole new perspective on the relevance and application of what they were learning.

The local authority already had an active Professional Development/Teacher Placement service, with SRB funding to help. The cluster co-ordinator saw it as her role, when she visited a school and met a teacher preparing to go onto a PDP/TP, to help them prepare by finding out about the company and discussing how the experience could be integrated into classroom activities *etc.*

Constraints

Factors which affected the degree of progress made during the pilot period included:

- 'initiative fatigue' – this was a significant issue because of the substantial amount of time which schools, particularly the secondaries, had devoted to producing the detailed work-related delivery plans required to qualify for a share of the large amount of European funding acquired by the LEA. In fact, the broker worked with schools in forming these plans and showing how EBL activity could make a valuable input. Bidding for specialist college status was also identified as having taken a great deal of time and attention
- late start/lead-in times – the impact on EBL activity had been limited in the first year of the pilot because of the lead-in time involved in selling the concept

- key absences – a lot less than planned took place in the secondary in the first cluster because of the long-term illness of the senior person acting as co-ordinator, who had not been replaced
- timing of EBL activity – much EBL activity tends to be timed post-SATs, as do activities arising from other initiatives in which schools get involved. Hence, there is much competition for, and pressure on, the school timetable in May/June each year, and on the broker to organise activity for then
- the pressure of work felt by teachers – for example, one primary school reported that it used to engage in a lot of EBL activity some years ago but ‘the national curriculum had shut the door’. However, the cluster pilot had provided an opportunity for teachers to reassess, the EBL toolkit had given schools more confidence in dealing with businesses, and the school was now engaging in a lot of EBL activity once more
- the reluctance of teachers to keep leaving their classes in the care of others – given the pressures on them to achieve results (‘league table competition’ is still evident) and given that they are required to spend time away from the classroom for other initiative-related training
- the size of student groups – this can be a significant constraint in secondary schools. Large groups need to be split into several smaller ones who visit *etc.* on different days, but that increases the cover and disruption (to timetable *etc.*) costs.

Dissemination and sustainability

The cluster produced two newsletters. The second one was sent to all schools in the local authority area and to 700 businesses, incorporated as part of the Chamber of Commerce’s magazine. In addition, a cluster celebration event was held near the end of the pilot period and was attended by a number of schools and businesses.

The GO and LEA were keen that outcomes and good practice should be disseminated more widely and GO included a session on the cluster pilot on the agenda of a residential course involving the regional EBLOs towards the end of the pilot period.

The LEA’s SRB co-ordinator plans to transfer the notion of the cluster working group to other ‘pyramids’ in the area, and to introduce them to the ‘toolkit’ *etc.*

One of the key objectives of this cluster had been to develop strategies to promote sustainability of activity and partnerships beyond the pilot period, and regular discussions took place between the broker, GO and LEA about how to put an infrastructure in place to enable work to continue and expand beyond the cluster. The model towards which they were working

was one in which a broker works with several clusters. Part of the approach had been to help the schools involved by making available a range of interesting materials, including the 'toolkit', and useful contacts in order that any extra effort required by busy teaching staff would be minimised. The broker facilitates the relationship between the school and the business but does not do the job for them. It was recognised that there would be initial setting-up costs in getting the model up and running across the region but that the ongoing running costs would be less.

Several schools said that they will continue to push staff to look at schemes of work/citizenship/PSHE *etc.* to see where EBL could fit into their normal activities, and in the absence of the broker would approach the local authority's SRB work-related learning co-ordinator if they needed help. Parental contributions were mentioned with regard to covering transport costs, where these could not be planned into the school budget. Other initiatives had also been used to fund visits *etc.* – *eg* 'Sports For All' had paid for links with a local basketball team which had focused on teamwork, life skills *etc.*

Value added

Generally speaking, it was not always easy to separate out the impact of the cluster pilot activities from those arising from the SRB initiative. However, the key areas of added value appear to have been:

- all schools in the first cluster have written a WRL policy, of which EBL is a key part, and which they have shared. This has not yet been achieved for the second cluster. One head in the second cluster said that he wanted the school to gain more experience of EBL activity and how to do it well before writing an EBL policy
- EBL activity has a clear purpose which is demonstrated in the 'proposal to business' (based on a template designed by the broker) which sets out what the school hopes to achieve from the business link, what it would like the business to do, what follow-up activity would take place in the classroom *etc.*
- in a number of the primaries, there is clear progression rather than a situation in which activities are restricted to one or two classes or year groups, *eg* in one primary, EBL activity has been linked into the curriculum for every year group rather than for just one teacher's class as previously. In other primaries, one or two year groups had been involved in EBL activity and the intention was, having learned from that, to look at schemes of work to see where EBL could benefit other year groups, and plan and organise accordingly, with outside help

- several primaries said that the amount and depth of EBL activity is deliberately planned to increase as the pupils progress through the school
- it was claimed that a major strength of the work done during the pilot had been its bespoke nature, with the broker working with schools to match activity to need
- most of the primaries in the second cluster already had a reasonable record on EBL activity, but nevertheless some of them became very involved with the broker, and converted other activities/outside visits *etc.* into EBL activities by changing/adding to their purpose to incorporate a 'world of work' focus
- contacts between schools did not develop as fully as was hoped, other than those that would have happened anyway because of involvement in the SRB work-related initiative or normal transition links with the secondaries. There were some joint activities, *eg* a Technology Challenge, involving a local employer, involved the Year 6s and Year 7s and the schools involved met three times to plan
- however, some teachers did report that having met them at cluster meetings and on joint activities, they now felt able to contact teachers in other schools for advice/information/clarification
- at the end of the first year, a key challenge for the second year was seen to be the need to increase the number of businesses involved with schools, and a significant number of new businesses were 'brought on board', with the co-ordinator having had only one refusal. The approach taken by the broker in working closely with individual schools to develop their ideas into proposals which could be taken to businesses and which set out clearly what the businesses would be asked to do, why, when *etc.*, was said to have been very helpful to businesses in enabling them to understand what is expected and in planning their input
- businesses tended to be involved with several schools and involved in a number of activities
- businesses reported that they had benefited from working with schools in several ways: improved public speaking skills of the staff involved; improved staff's understanding of their own organisation because they had to research it in order to describe it to schools; developing future recruits; free publicity; increased sales (when pupils returned to shops *etc* with their parents).

It was widely believed that what had brought most added value had been the broker, and secondly the money provided to schools to cover costs of transport, attendance at meetings *etc* (just hiring a coach for a short trip can cost £200, so even small amounts of funding can be very helpful). Though the cluster itself had been

less effective than it might, nevertheless schools had worked together more than they normally would have done given the real sense of rivalry which persists around 'league table positions'.

The biggest difference which the pilot had made to the pupils involved was to provide a focus and a real purpose and relevance to their learning, widen their horizons, raise their awareness of the world outside, provide opportunities to work with people outside of school, and improve their motivation, self-esteem and personal and interpersonal skills.

A couple of the primary schools attributed at least part of the significant improvement in SATs results over the last two years to EBL activity which had broadened the curriculum and enabled the pupils to see the relevance and importance of what they learn. Children who might have otherwise become disaffected had achieved results which for them were significant because they have been motivated by EBL activity – the teamwork, the challenges involved in 'real problems' to solve, the deadlines, the involvement of adults other than teachers. In the secondary school in the first cluster, the head of business studies/ICT/office skills *etc.* attributed at least part of the improvement in GCSE/GNVQ and 'A' level results over the last five years or so to increased exposure to outside industry.

Case Study C

Background

This was a self-contained cluster of two 11-18 secondary schools and their six primary feeders in a tightly defined geographical area, a reasonably affluent small town. The sixth primary had been reluctant to become involved during the first year but joined in for the second year. The two secondary schools differed in their intakes, with one taking in pupils from a wider and less homogeneous area. The links between the primary schools and the secondaries were already well-established in respect of the usual Year 6 or 7 transition activities but these did not have a work-related element.

The pilot was overseen by the local EBP Manager. The broker in the first year was also managing a team of personnel (not involved with the pilot) at the EBP, but in the second year her replacement was a full-time, dedicated broker.

Early in the first year, the cluster agreed to hold a meeting once per term, but attendance was variable in the first year and the formal cluster meetings became less frequent in the second year. However, those which did take place were seen as useful by some of those attending in raising awareness of what each other is doing, potential for joint working *etc.*

Objectives

The objectives, as set out in the action plan, for the first year were:

- raising the profile, quantity and quality of education business link activity at Key Stages 1 and 2
- assisting the transition from primary to secondary
- increased activity at Key Stage 3
- more joint activity between schools (primary-primary, primary-secondary, secondary-secondary)
- improved key skills
- all this without extra 'burdens' on schools.

These remained unchanged for the second year but there was to be particular emphasis on:

- more linking between schools, including more joint activity between the two secondary schools and more joint Year 6/Year 7 work
- moving the focus in primaries away from mainly Year 6 and beginning to move down the age range.

Main activities

The focus in the first year of the pilot as far as the primaries were concerned was to bring them up to speed on the relevance/potential of EBL activity as most had been doing very little. All of the primaries started using 'Going For Gold' with their Year 6 pupils, a 'junior Compact' which had been developed by the EBP. In the second year the broker encouraged the secondaries to take it on also, for Key Stage 3 to begin with, restyling the concepts, materials *etc.* for the secondary pupils' planners. It is viewed as an effective transition tool.

Though there was increased activity in the first year, there was not as much as was hoped because of the time required to secure commitment, but the level of activity increased substantially in the second year. This increase impacted, in some but not all schools, on all primary year groups. Much, although by no means all, of the focus was on enterprise activity. For example, the 'Apple a Day' project was an enterprise activity which emphasised the work-related importance of honesty and reliability, and involved also numeracy and handling of money. It linked into the healthy schools initiative and to the citizenship agenda as well, when the pupils bought fruit for a local rest home with the profits made from selling on to fellow pupils apples provided at discount by a local supermarket.

A cluster newsletter was produced by a team of Year 9s working with a team of Year 6s all of whom had had to apply to the EBP Director for the 'job' in which they were assisted by the local newspaper. One of the primary schools took the whole school to a nature reserve, where they focused on 'the world we live in' not just the world of work, and linked different aspects of the work of the nature reserve to the science curriculum and the literacy agenda, whilst other schools took just one year group.

Activities for younger age groups included a CITB-supported construction project for Year 1/Year 2. 'Mission is Possible', a numeracy aid using the local newspaper but not involving a business link, was used with Year 5/Year 6 in a number of schools. One Year 6 pupil was quoted as saying: 'I found it very exciting and it made me want to do Maths when I usually hate it!' Several of the primary schools took their Year 6s to a local

university for a day, where, after a tour of the campus, they worked together on an industry activity, with some Year 10s from one of the secondaries to assist them.

The broker addressed all staff during an INSET day at one of the secondaries at the start of the second year, and following that she received a steady flow of requests for help from the staff in the school, not just the one or two who had been involved in the previous year. The other secondary was less active but was still involved in number of initiatives with the support of the broker, including industry visits and enterprise activity (jointly with Year 6s from one of the primaries).

Though work experience itself was not a particular focus of this pilot, a number of activities undertaken were designed to prepare students better for it. In both secondaries, all Year 9s went in groups for a half-day visit to different employers, and all Year 10s had a one-day work experience preparation programme at one of the local football clubs with an emphasis on confidence-building, self-presentation *etc.* One of the two secondaries had done work experience preparation like this before but for 30 Year 10s not 195. Also, 30 Year 10s from both schools participated together in a 'Working For Me' conference (preparation for life) at the local racecourse. All Year 11s in both schools had mock interviews, which were well-structured, involved a wide range of employers, and for which the pupils were given the time and materials to plan and evaluate. There was excellent student feedback.

The broker organised several activities for 'disapplied' Year 10s at one of the secondaries, *eg* a 'construction day' when the disapplied Year 10s worked with Year 6s from two primaries in designing and building a (model) house and reviewed the activity afterwards. The broker also worked with the Work-Related Learning Co-ordinator at the other secondary, who also had a group of disapplied pupils in Year 10 and Year 11 for whom a wide variety of activities were arranged.

By the end of the pilot period, schools had not yet reached the policy-writing stage.

Constraints

A number of constraints were identified:

- the late start to the pilot as a whole in the first year meant that activities began in schools late in the autumn term and the beginning of the spring term
- the demands of the curriculum, pressure of SATs *etc.*, and associated with these the time which teachers need to be out of school already for INSET activities *etc.*

- the relationship among the primary schools was described as quite competitive and this was thought to partly explain why relatively little joint activity between primaries had been generated
- most primaries in the first year saw EBL as a 'post-SATs' activity but this lessened during the second year and schools started to undertake appropriate EBL activity while doing the curriculum topic in-year
- schools needed help in seeing how Professional Development/Teacher Placements could fit into/help curriculum delivery
- on a number of occasions, an activity had been cancelled by schools at a late stage because it clashed with something else, *eg* an Industry Day, which had taken a great deal of organisation by the broker and school's EBL co-ordinator was cancelled because it clashed with a Maths exam, pointing out the importance of communication within schools
- the service is vulnerable if it depends on one individual to play the broker role, *eg* when that person is ill or a key teacher moves on.

Dissemination and sustainability

A cluster newsletter was produced by a team of Year 9s working with a team of Year 6s.

The EBP secured funding from the local LSC's Local Initiatives Fund to help towards the costs of materials production for enterprise activities, and LIF also helped to fund the costs of reproducing some literacy/numeracy materials developed by one of the primary schools following a visit to a nature reserve. That visit was eventually undertaken by most of the schools in the cluster. The EBP also disseminated them to all 92 schools in the local authority area through other local EBPs. The nature reserve itself has, following that activity, produced a CD-ROM which it distributed to all schools to alert them to the possibilities.

The EBP led a workshop at the EBP National Conference in September 2002 on its experiences during the cluster pilot. It hopes to repeat something like this cluster pilot with another, though larger, group of schools next year, using EBP core funds to cover the broker's salary.

The EBP remained committed, after the pilot ended, to providing a service to the schools involved, though not the 'gold' service which they received during the pilot. The EBP has Service Level Agreements with the two secondary schools and will continue to organise some activities for them under the SLA. It has also offered SLAs to the primary schools but will need to charge out its time.

Some of the activities which were introduced into the schools had consumed brokerage resource in 'getting them on board' and in organising the links between schools and other organisations, but, it was suggested, once they are established they do not need much ongoing broker input and as long as schools are convinced of the value, they should carry on. Other things may wither without outside help, even though the interest is there and the value is understood, just because schools don't have the time required.

The schools clearly valued the time the broker could give, and the expertise, and believed that without that input they would struggle to find the time to plan, organise, firefight *etc.*, all of which can be very time-consuming. In primaries, in particular, the fact that teachers spend all day in front of their classes and have little time and flexibility for organising visits *etc.*, can make EBL activity vulnerable unless the Head is very committed.

Value added

There was a substantial increase in the amount of EBL activity, in the primary schools but especially so in the secondaries, though less so in Year 7. The increase impacted on all primary year groups, though not in every school. A particular focus, at one of the secondaries in the second year of the pilot, was on the Year 10 disapplied group, and this inevitably had an impact on the time which the broker could devote to other year groups. Activities had also covered much larger proportions within year groups, *eg* a mock interview programme for part of the year group in one of the secondaries had been so successful, involving lots of employers, that the headteacher had said it must extend across the year group for the second year.

One of the key objectives for this cluster was to increase the amount of joint activity between schools. In practice, although the Year 10s and Year 12s had participated in a few joint activities, there was still little joint activity between the two secondaries specifically arising from this project, or indeed between the primaries, but there was a lot more between the secondaries and the primaries.

The other main elements of added value arising from the pilot were:

- activities were more customised and designed to meet the needs of individual schools, than had been the case traditionally, although it was acknowledged that in the first year, there had been more emphasis on a ready-made, project-led approach ('Going for Gold' *etc.*)
- there was clear evidence of clear and relevant learning objectives for EBL activity, of activities designed to enhance

delivery of the curriculum, and of extended follow-up work back in the classroom

- most of the schools involved felt that the input of the broker had been the most valuable aspect of the pilot frequent visits. Nevertheless, they did say that there was added value from being part of a cluster – although the brokerage support was the most important, some of that was about organising joint activities with other schools in the cluster, disseminating what others were up to *etc.*
- the biggest difference which EBL activity had made to the pupils involved was to make learning more fun/interesting
- joint EBL activity gave primary age pupils a taste of what secondary school would be like in a relatively pressure-free situation and an opportunity to start thinking about life after school at an age when they normally would not do that
- the work with the disappled Year 10s had significantly boosted their confidence and self-esteem and their appreciation of the importance of the key skills. The teacher working with them said: 'It was the start of a big improvement in their attitude. Now, when they are out of school, they are a credit to us.'

Case Study D

Background

This pilot was located in a socially and economically disadvantaged area of a large city. The cluster consisted of two secondaries (both 11-18) plus four or five of their main primary feeders. Both secondaries in fact had a much larger number of primaries which fed into them, and those which were not part of the pilot received information about the pilot activities and could participate in them if they wanted but they received no support or funding from the broker to do so. One of the original secondaries did not continue into the second year, and another secondary, which was in 'special measures' and part of an Education Action Zone, joined in its place.

In both years, the 'cluster' operated in practice as two separate clusters and, in practice, the schools in the two separate secondary-primary clusters did not do much joint activity. However, joint training sessions were held for teachers from both clusters and those who attended them found the sharing of ideas *etc.* useful. The strategy of the broker was not to create additional groups/meetings, but to try to integrate pilot activity into existing structures. One of the secondaries was part of an EAZ and that was believed to have really moved the project forward.

The broker was part time throughout the two years, funded 2.5 days per week, but in practice the project work involved working up to three days per week. The remaining pilot funds were given to the individual schools to pay for transport, cover for attendance at meetings, video cameras for use in the pilot activities, cost of venues/workshops *etc.* Management of the pilot was undertaken primarily by the broker's line manager in Connexions, with Government Office receiving a monthly report and holding occasional meetings with the broker.

Objectives

The objectives for the first year differed between the two secondary clusters. They were:

Sub-cluster (i)

- increase staff and student awareness of the world of work, with a specific focus on Year 10
- begin to embed work-related learning in the Year 10 curriculum
- develop a progressive programme of work-related learning through Key Stages 3 and 4.

Sub-cluster (ii)

- enhance existing links with feeder primary schools to develop transition and work-related learning skills
- support the development of a whole school approach to EBL/WRL.

In all of this, there would be attention paid to developing resources and activities which could be replicated. The objectives for the second year were changed to reflect the increased attention to be paid to generating activity in the primary schools. The secondary school which joined the pilot in the second year decided to focus explicitly on Year 8 rather than on Year 10, as in the original secondary which dropped out of the pilot.

Main activities

During the first year, the focus was on supporting the secondary schools in enhancing their existing provision and developing new provision, and where possible enhancing activities which bridge the Key Stages 2/3 divide through a greater focus on work-related learning. The majority of the funds and broker time in the first year were used in the secondary schools. The primary schools became more involved in the second year, when they focused their EBL activities mainly on Year 5/6.

Following on from an audit of EBL activity, one of the secondary schools produced a whole school EBL policy which was submitted to governors. The other secondary which joined later, and the primaries, intended to gain more experience of EBL activity before developing policy statements. However, each of the two clusters produced an EBL action plan for the pilot, with aims and objectives, outputs, milestones, evaluation activity, the year groups to be covered *etc.*, and more detailed action plans for individual initiatives.

The focus of activities has been on three initiatives: the 'WOW' ('World of Work') factor, a speaking and listening skills project, and 'Make it Real'/'The Real Game'. One of the secondaries which had already been undertaking some EBL activities pre-pilot also carried on with those (mock interviews, Insight into Industry *etc.*)

and its focus in the pilot was on improving the quality of existing activities and developing a whole-school framework for EBL activities, hence the development of the 'WOW' factor.

The 'WOW' initiative developed out of consultations which the broker and colleagues carried out with employers, teachers and pupils on the attributes, skills and attitudes which young people need for the world of work, the 'WOW' factor. The broker then worked with a team of staff from one of the schools to identify the school's vision of the skills and abilities its students would need on leaving school to be successful in life, learning and work, together with learning outcomes for each year group, and activities which could be undertaken, to support young people in achieving the 'WOW' factor. Existing activities were enhanced and new ones planned. In addition, the broker used nationally-recognised kitemarks and checklists to devise criteria for the processes and procedures to support a whole-school approach to EBL activities. The checklist was used by the schools as a self-assessment tool and the results were used to draw up action plans.

Schools were provided with a 'WOW' prospectus which included the list of attributes and the self-assessment form, plus a list of the EBL activities which the school planned to use to help young people develop the relevant attitudes and attributes. The pupils had, as part of their planners, 'WOW' leaflets where they could record how EBL activity had helped them develop the skills and attributes required to achieve the 'WOW' factor, and they were given time in their PSHE lessons to keep these up to date. Teaching staff were also asked to complete an audit showing how their teaching contributed to the development of 'WOW' attributes, the business contacts they used *etc.* The aim was to get teachers to integrate delivery of 'WOW' attributes *etc.* into their schemes of work, regularly assess how well they are doing that, identify gaps *etc.* The 'WOW' initiative related to Years 7 and 9 at one secondary, and focused on Year 8 at the other. Most of the students received certificates to show that they had achieved their 'WOW' factor. The intention is to begin to extend the 'WOW' factor to the other secondary year groups next year, and work has already started on developing a 'WOW' factor for Year 5 and Year 6.

Through the EBL project, the primary schools (Year 5/6) and one of the secondaries (Year 8) became involved in a 'speaking and listening' project. The schools had identified speaking and listening skills as a prime area of concern and each school was linked with a different business to help pupils develop those skills. The link business was asked to visit the school and give a presentation on the company on why speaking and listening skills were so important in its work, and to host a visit to the company so that pupils could practise their speaking, listening and presentation skills in a new context. Each of the schools involved used some of the pilot funds to purchase a video camera which

they used to enable the youngsters to see and evaluate themselves involved in group work, and to practice their skills.

The broker did a lot of work with the EBL co-ordinator in one of the secondary schools to develop better preparation for work experience, producing a document which set out (for student and employer) the aims and objectives of work experience, how it is to be delivered, responsibilities within and outside of the school for ensuring effective delivery *etc.* In addition, the Connexions Service provided students with a logbook which sets out what work experience is designed to do, and includes self-assessment sheets which enable the student to identify the new skills developed *etc.* However, for health reasons, the time which the EBL co-ordinator could contribute was reduced and progress slowed considerably. It is hoped that the improvements in quality will be implemented in time for the work experience programme next year.

Constraints

A number of constraints were identified which had affected the progress made by this pilot, including:

- the broker being directed to concentrate on the secondaries in the first year and not really starting work with the primaries until late in the first year
- some of the primary schools were still at the end of the pilot period having difficulty in seeing how EBL fits into what the Government is asking of them more generally, in particular the focus on SATs results. Although those schools had enjoyed participating in the pilot, they were not yet fully signed up to the idea of a whole school approach *etc.*
- much of the activity in the primaries took place in the last month or so of the Summer term because it was seen as a post-SATs activity, and because of the considerable lead-in time involved in a project like this
- time for attending meetings was a key constraint, especially for primaries which have very limited capacity to cover 'absentees', and the limited budget for the pilot meant that the schools could not be given funding to always pay for cover
- however, even if cover is available, teachers are reluctant to leave their classes, given pressures to achieve, and impact on contact time is a big issue for all schools
- the broker was only half time and there was therefore a limit on how much individual support could be offered to the 11 schools involved in the pilot
- there is an issue when a primary feeds lots of secondaries. One of the primaries said that it had had a problem forming a close relationship with the secondary involved in the pilot because its pupils fed into a dozen schools (including several private

schools) and only one or two Year 6 pupils went on to the secondary concerned

- competition between the secondaries was an issue, partly because the area has a large private sector – at one primary, only three or four of the Year 6 pupils went on to a state secondary. Competition was said to limit the sharing of ideas *etc.*, and there was little joint activity between some schools in the cluster
- several planned activities did not materialise for some primaries because their main business contacts moved to new jobs and because, in one case, the school had an OFSTED inspection
- similarly, one of the secondary schools had had extensive plans in respect of improving the quality of work experience but they did not materialise because the teacher concerned was unable to cope well with the extra pressures
- teachers, and in some cases their headteachers, were very cautious about the value of Teacher Placements/Professional Development Placements, given the other demands placed on them, and some did not seem well-informed about them.

Dissemination and sustainability

The Connexions Service, which employed the broker, has started to extend the brokerage/funding support concept to a larger number of secondary schools in the area, providing some broker time/money to schools (but substantially less than the cluster schools had received during the pilot) to help them develop a more strategic approach to their EBL activity. Local EBLOs are funding the initiative. All schools in the region have been made aware of the 'WOW' prospectus.

Arising from its participation in the pilot, one of the secondary schools won a regional award for its contribution to work-related learning. Many schools and employers attended the award ceremony, where the broker presented a workshop about the pilot to the region's EBLOs and employers.

In terms of sustainability, some of the primaries involved in the pilot will continue to receive some support as part of the project mentioned above. In both secondaries, the fact that there is a headteacher committed to EBL, and to the 'WOW' initiative in particular, with its accompanying framework and management group, means that much of the momentum achieved by the pilot should be sustained. Introducing the 'WOW' factor had been deliberately aimed at sustainability. One of the secondaries also intends to continue with, and improve, its speaking and listening skills work and 'The Real Game', but next time introducing an employer, and in time will introduce both activities to another year group also. The primaries also planned to continue with the

speaking and listening project, with the visit to the employer involved being supported via the school budget or by parental contributions. The 'Make it Real' game should also continue, but plans to extend it to other age groups would not be straightforward without a broker to organise business links *etc.*

Value added

There was undoubtedly an increase in the amount of EBL activity as a result of the pilot, and there is the intention to extend it to other year groups over time. It was also clear that the EBL activities which took place were well planned with their purpose understood and linked to curriculum requirements.

The other main elements of added value arising from the pilot were:

- the primary schools reported that EBL activity had improved their pupils' motivation and their appreciation of the wider world out of school, while the secondaries said that it showed the pupils, particularly the disaffected, what they needed to do to achieve what they wanted
- one of the secondary head teachers attributed a good part of the significant improvement in Year 9 SATs that year to pupils' increased engagement in school work and awareness of its relevance arising from EBL activity
- teachers also said achievement more generally across the age range improved, including attendance and aspirations.
- EBL was seen as being accessible to SEN pupils, providing them with a different way of learning and giving them experiences which they would not otherwise have
- one of the schools involved had developed a written EBL policy and the others intended to do so as they built up experience of activities and outcomes
- the 'WOW' initiative was said to have impacted significantly on both pupils and teachers
- the input of the broker was highly valued and more so than the cluster concept but those who had attended meetings with other schools had found the sharing of ideas *etc.* very useful.

Case Study E

Background

Case Study E is divided between three market towns. The three clusters are each based around a secondary school that was involved in a 'Pathfinder project' which enabled secondary schools in the county to develop Key Stage 3 work-related learning activities and objectives, linked to quality processes.

Each of the three secondary schools were linked with two feeder primary schools (in one area, pupils of two middle schools represent the majority of the secondary school intake).

Each cluster is serviced by one part-time broker, acting as a facilitator, and providing administrative support and direction. The role is 'additional' to other responsibilities. The clusters meet at least once a term but a number of additional meetings between the brokers and the individual schools take place as and when the projects have demanded.

In Year 1, the brokers reported on activity and evaluated progress for internal purposes. In Year 2, an independent consultant has undertaken the evaluation. This summary, however, has not benefited from access to the local evaluation. In Year 2, the Government Office took a closer interest in the project.

Objectives

At the outset, the main purpose of the project was to extend the Pathfinder project (four secondary schools audited their education business link activities, agreed learning objectives and set up internal management structures to support business link activity) into primary schools linked to three of the 'Pathfinder' secondary schools.

The original aim was to test the value and effects of a planned programme offering progressive experiences of the world of work from Key Stage 2/3 to 4. This involved:

- developing a range of activity in primary schools and better links between schools in each area

- improving progression between Key Stage 2/3 and transition from Years 6/7 to 7/8
- establishing an approach based on learning objectives.

In Year 2, the objectives remained broadly the same but were supported by the development of embedding strategies that, it was hoped, would ensure the effective management of work-related learning as part of each school's development plan.

Main activities

Year 1: overview

All schools were taken through a work-related learning audit, and agreed activities and work-related learning objectives for a project. Most projects were linked to Personal Development Placements (PDPs).

- *Cluster 1:* Business and community activities week – this involved Years 5/6 in two primary schools working on joint projects with Year 7 in secondary school. This was the first time schools worked together on a joint activity. The activity aimed to develop key skills and improve transition through linking the primary schools to the secondary, and undertaking much of the activity on the secondary school premises. The project was broadly viewed as a success, although there were difficulties in delivery.
- *Cluster 2:* Secondary school could not participate; primary schools undertook individual education business link-related activity, linked to a supermarket.
- *Cluster 3:* Two middle schools undertook individual education business link-related activity (in one, this was a continuation of existing activity). The secondary school developed work shadowing for work experience preparation and development of Key Skills. There was joint cluster work to map activity between schools.

Year 2: overview

- *Cluster 1:* Repeated Year 1 project with modifications. The main change was to include more business partners so that following the pilot there would be more possibilities to maintain activity.
- *Cluster 2:* The secondary school remained unable to participate. An improved relationship between primary schools led to two schools working on joint project, but one in Special Measures was unable to fully commit itself.
- *Cluster 3:* All three schools worked on joint 'Recruitment Fair' project. Year 8 pupils in two middle schools split into teams to

develop recruitment companies in partnership with 14 local businesses for presentation to a Year 9 careers fair. Prior to completion the project was viewed as a very successful joint activity. This project addressed a number of learning outcomes, including key skill development and understanding of the local economy and labour market. In addition, it helped the middle school students gain familiarity with the high school.

Constraints

It was reported that attempting to develop joint projects and activities with schools that are not able/willing to participate was problematic. A considerable amount of time was devoted, especially in Year 1, to schools who did not participate fully in the pilot. In a couple of cases, schools were reluctant to engage due to other priorities in school, and in other cases there was a lack of SMT commitment or time. There was also, in at least one school, an unwillingness to learn from partner schools and this consequently resulted in difficulties in developing a cluster approach to the pilot.

There was also evidence of a competitive situation between adjacent primary schools, and this inhibited joint working. A broker reported on the importance of schools to assume equal responsibility in partnership in order to develop a cohesive cluster.

Other constraints included difficulties experienced in ensuring schools maintain sight of learning objectives. It was reported that schools (especially in the first year) were too concerned with delivery of the activity and lacked a clear focus on learning objectives/outcomes.

One primary school in the area was also in Special Measures, which influenced their involvement, and another secondary school was also experiencing problems which reduced their ability to engage in the pilot.

There was also a view that school culture in the area is to work independently, even where there was a more effective partnership, and was not been entirely overcome in the course of the project with the 'established' school driving the partnership.

Finally, there were one or two reports of difficulties in finding appropriate supply cover, although this was not reported as an issue across all three clusters.

Dissemination and sustainability

Two brokers were involved in a 'road show' which discussed the cluster approach and a process built on developing learning objectives.

A toolkit has been developed to assist brokers and others working in schools to develop quality processes in supporting education business link activity and work-related learning. The handbook is currently being considered by the LEA.

Further dissemination will take place within the EBP, and the Government Office indicated that it is interested in building on the pilot.

The likelihood is that some activity will continue (in some schools, projects and activities are written into curriculum plans for next year) but will not be maintained without further broker support in the long term. In one cluster the broker was less involved in the second year of the pilot in order to help the cluster 'stand on its own two feet'. The project continued, but due to a lack of feedback the success of this approach is not known.

It is felt that there is a wealth of willing business and community partners and that the onus is on the schools to assume more responsibility in developing future activities with less support from the brokers.

One secondary school used the cluster work to support its specialist school bid (as it needed to demonstrate working with other schools and the pilot helped in this regard). This school was also concerned about losing intakes to a neighbouring county that has a popular grammar school. As a result, the school is concerned to improve the quality of both its two feeder primaries so that potential students are not lost from the area.

Value added

The auditing process of the project has proved valuable and seen as very important in helping the schools focus on their needs.

Brokers became more able to undertake EBL projects linked to quality processes of reviewing existing activity, identifying gaps, agreeing learning objectives and developing relevant 'needs led' projects. Now brokers and project personnel are more focused on 'why' they are doing an activity, and appreciate the learning curve schools need to be taken through, and are less activity/funding driven. In at least one case the pilot has changed the way brokers work with schools.

There have been increased levels of business involvement, from three new partners in Year 1, to 19 new partners in Year 2. There

was some indication that business commitment will continue after the project is completed, but the onus will be on schools to make use of the available resource.

Brokers acted as the main link between employers and schools and several participants said that without the broker their project would not have been feasible. Key roles included: acting as a motivator of school staff, chairing meetings and providing essential administrative support. Teachers (where visited) were very positive about the broker and their role.

The level of cluster activity improved significantly in one area, during the course of the project, mainly due to the persistence of the broker, but stayed at a lower level in another, despite the best efforts of the broker. The success of clustering in the pilot has been mixed, and seems very dependent on school relations prior to the pilot or in having a purpose in addition to exploring work-related learning issues.

More work-related learning activity has been delivered in curriculum time in several schools and it is argued that curriculum planning should mean that at least some activity continues after the pilot.

Sharing ideas and experiences and enabling some joint planning has been the main positive outcome. There is some evidence that the objectives for the clusters have not been tight enough resulting in projects that have been activity driven rather than objective led.

Case Study F

Background

Case Study F was situated in a rural area surrounding a market town and covering some 225 square miles. Fourteen schools were invited to participate in the pilot at the outset. These schools form a high school pyramid with one high school, one middle school, one special school and 11 first/primary schools. The pyramid forms half of an EBP Local Management Group. Not all schools participated at the outset but as the cluster progressed more joined.

The broker role was undertaken, in the initial stages, jointly between two individuals contracted to the EBP. Both retained other roles. As the project developed, the role was split into two separate, but occasionally overlapping, roles: one part-time (0.2) broker (Field Officer) 'additional' to other roles, and one 'stand alone' part-time evaluator.

The cluster met at least once each term and further individual meetings between schools and the broker took place on a regular basis during the course of the pilot.

Much of the funding was used to support professional development placements and the development of materials resulting from the placements.

Each year a local evaluation was completed.

Objectives

The aims of the pilot were to:

- support management, leadership and staff development in participating schools
- enhance delivery of the national curriculum
- produce a range of support materials for teaching and learning.

At the outset, the pilot also aimed to prepare pupils for the world of work and enhance employability within Key Stage 3-4. However, as the project progressed it became increasingly focused

on Key Stages 1 and 2, and to a lesser degree on Key Stage 3 (in the middle school) and associated needs. Objectives linked to the secondary school were set aside due to time and commitment constraints within the school, which limited its participation.

Main activities

A number of successful outputs were generated through the course of the pilot, building on the audit of school needs and requirements, PDPs and school-business links.

In particular, the cluster has worked together successfully in the following ways:

- through **developing a range of work-related curriculum materials** (in several media – big book, loose leaf, CD-ROM), that are relevant to the local economy (all books were reviewed by the business involved), and differentiated for all age groups in Key Stages 1-2, and Year 7 in Key Stage 3, as well as being relevant to most areas of the curriculum
- **teachers from participating schools trained in the design of websites**, and subsequently developed joint and individual websites for the cluster and participating schools
- **improved professional development** (also seen by headteachers and schools as improving individual employability/ career opportunities). Demand for professional development placements increased significantly during the course of the pilot
- **improved communication channels and networking** through increased and improved use of ICT, e-mail and websites, and cluster meetings (ICT literacy is reported to have improved among participating schools).

Other reported achievements include:

- more positive business input and commitment – for example, business representatives attend cluster meetings
- starting to extend into neighbouring pyramid.

Constraints

At the outset, it was anticipated that as the pilot was based on a number of small schools (nine schools with less than 100 pupils with mixed age/Key Stage classes), geographically dispersed (different start and finish times to accommodate inter-school travel) with teaching heads, communication and supply cover problems would inhibit progress.

During the course of the pilot it became apparent that this 'geographical constraint' was possibly a strength, as the schools

were not in competition and the Heads, most of whom were committed to the cluster, gave a significant amount of time to the projects. In Year 2, many brought with them other staff from their schools, so internal dissemination was achieved.

This said, there remained difficulties in participation for small, dispersed schools with teaching heads. These included: communication problems (many headteachers in small schools only deal with their administration once a week), teaching priorities, and difficulties in accessing supply cover.

In addition, lack of teacher time and other priorities can be a barrier to involvement. However, in most cases, these constraints were overcome.

Finally, the extensive work of the cluster and the Field Officer generated increased workloads and demands on resources within the EBP at the centre. This created a tension within the project, which was never successfully addressed.

Dissemination and sustainability

All outputs generated throughout the project were disseminated throughout the cluster and pyramid at celebration events and twilight meetings. Key personnel from the LEA and EBLO also attended.

All materials/'Big Books' are likely to be used further by participating schools and can easily be updated/amended as they are available on CD-ROM. There is a view, however, that materials developed are not taken up by schools outside the immediate area as well as was hoped at the outset, perhaps limiting the wider application of materials.

Several schools within the pilot have changed fundamentally the way they deliver aspects of the National Curriculum to embrace work-related learning and education business links. In a couple of cases, policies are in place, and several schools include cluster activities in their school development planning. Some governors' meetings also include briefing on the pilot and its activities.

Other pyramids within the EBLO boundaries are also being encouraged to work more collaboratively as a result of the pilot.

In addition to this, the website acts as a further focal point for dissemination and the co-ordinator of the website is now the Chair of the local management group in which the pyramid is based. It is hoped this will also improve the sustainability of the project and further dissemination.

Key personnel in the LEA, the Local Management Group and the EBP are interested in pursuing the work, and evaluation findings have been reported to other West Midlands EBPs.

Future embedding is believed to be dependent upon work-related learning becoming part of the school, cluster, pyramid and EBP/LEA planning process. There is some evidence of this having taken place at school level and to a lesser extent at EBP level.

Future work of the cluster also depends upon the EBP/EBLO and LEA maintaining the profile of EBL and work-related learning in the pyramid structure and cluster meetings.

Finally, the EBLO has changed the funding mechanism so that resources will be distributed within the county in relation to numbers of schools rather than numbers of pupils. The previous approach disadvantaged small schools.

Value added

The main beneficiaries of the pilot were the middle school and its feeder primaries. In most cases, there have been significant changes in the approach to work-related learning. As a direct result of the pilot, most participants better appreciate the relevance of work-related learning and education business links, and how they can be applied to both the National Curriculum and other activities in school.

Several participants also reported that activities are now much more clearly linked to learning objectives/outcomes and aligned to QCA schemes of work.

There should be long-term benefits from the materials developed in the course of the project.

PSHE in the middle school achieved good reports from OFSTED as a result of the cluster project.

There is evidence that the pilot has resulted in a much more cohesive approach to work-related learning across the pyramid. This is in terms of individual school planning and in progression/standards across the area. Between-phase understanding has also improved, which may lead to improvements in transition. In addition, there have been improvements in the degree of co-ordination/collaboration and sharing of practice between schools.

Within schools, there are references to work-related learning and education business links being written into development plans, policies and minuted within governors meetings.

Demand for PDPs has increased significantly during the course of the pilot. In the summer of 2002, eight five-day PDPs were

planned, with £300 bursaries to encourage participation. However, the importance of the funding to support supply cover and travel costs is an important factor.

A significant increase in business involvement and commitment has been witnessed during the pilot. It is felt that producing high quality materials engages business commitment and interest, and this has been apparent in attendance at twilight meetings, improved involvement, and some are becoming increasingly engaged in spin-off projects and activities as schools/teachers build improved relationships. Some national businesses are also seeking ways to extend projects within their organisations.

It is thought that the pilot has reduced possibilities of repetition of activities, and the middle school now has an improved understanding of the work-related learning/links undertaken in first and primary schools.

Broker support for the cluster has been viewed as essential to its success. In particular the Field Officer has provided much impetus to, and motivation of, the cluster and is widely seen as key to the maintenance of the cluster. There has been significant hands-on involvement from the Field Officer, and partly as a result, schools are possibly over dependent on the broker contribution.

However, a culture of sharing practice, standards and ideas has been instilled in the cluster, with many barriers having been broken down. The LEA feels that among small schools this is a big step to improving standards. Also, successful networking between schools in the pyramid has enabled better communication of pupil problems/issues.

Other sources of added value include reports of increases in the confidence and self-esteem of teachers through having delivered quality outcomes with, and to, business people.

The introduction of occasional twilight meetings (with buffet and wine) has improved attendance among all participants and is cost effective (they do not have to pay for supply cover). However, there is a reported need to be sensitive to workloads and demands on teachers' own time. Improvements in networking and mutual support are also seen as an additional benefit from this approach.

School and business commitment has increased significantly but with considerable support from the Field Officer. There is concern that if this level of support is reduced (seen as inevitable because she gave time over and above funding) schools will pull back. Most view the Field Officer as essential in providing administrative support, ideas, direction and cohesion to the group with independence and objectivity.

Case Study G

Background

This pilot was split over the two years. In the first year, the project was based in an economically deprived town and involved two secondary schools and four primary schools. Responsibility for the pilot was shared between two part-time brokers. However, the area was a designated Education Action Zone (EAZ) and this led to concerns that the schools may be suffering from 'initiative overload', hence the decision was taken to move the pilot to a different area in the second year.

Thus, in Year 2, the pilot moved to a semi-rural, more affluent area. At the time of pilot this area was not serviced by an EBP and had little experience of education business links. It was felt that introducing schools to business links through the pilot could be a valuable precursor to setting up an EBP. As in the first year, the second year of the pilot involved two secondary schools but the number of primary schools involved increased to five. The broker acted in a 'stand alone' capacity in Year 2, contracted for the duration of the pilot.

Another change in the second year, was that a sixth of the funding was directed to a different county within the region in order to assist the dissemination process. This project was managed independently, although evaluation and monitoring of the project was fed back to the contract holding broker.

The clusters met once per term to discuss issues and progress, with further meetings between the broker and schools to undertake audits and help in preparing and delivering activities.

Objectives

As the pilot moved locations, the objectives changed. In Year 1, the focus was to look at the development of teacher placements, linking in with school programmes of professional development, helping to enhance and enrich the curriculum, and to assist employers and schools to enhance work experience programmes. This was linked with the local objectives of the Education Action Zone.

The aims of the pilot in the second year were to:

- test the value and effects of a programme offering experiences of the world of work to pupils in Key Stages 1-4
- link a group of schools to develop and implement a joint strategy for delivery in each Key Stage
- demonstrate how brokerage and clustering of schools can produce a step change in the contribution of education business links to learning outcomes
- disseminate the outcomes across the region and inform development of future education business links.

Main activities

In **Year 1**, a number of successful projects were undertaken by the participating schools, including:

- **Impact Theatre Group** presentations to Years 10 and Years 6 on the world of work and vocational choices. For Year 10 it was viewed as successful in helping students choose placements and gain more from their work experience
- a large number of **teacher placements** took place, linked to both curriculum projects and work experience. In the case of the latter, these aimed to help the employer develop a wider range of quality placements
- several **curriculum projects** were delivered in the primary schools. In most cases these were viewed as highly successful
- a particularly successful **mini enterprise project** took place between one school (building on several teacher placements), a local bank and a printing firm (producing postcards). This was seen as meeting a large number of learning outcomes.

In **Year 2**, the cluster was organised in a similar format with individual curriculum-related projects heavily supported by a broker/facilitator and based around professional development placements. None of the primary schools involved had undertaken any EBP linked activities prior to the pilot.

One school achieved an Arts Mark award on the basis of their involvement in education business link activity and the pilot. Another school received a curriculum award partly as a result of their project during the pilot, and others are submitting entries for Excellence in Partnership awards. This also assisted the dissemination process.

In Year 2, as part of the dissemination within the region, funding also supported an ICT project in a neighbouring county. This project helped link primary schools to a 'data control' project

within a secondary school, enabling improved delivery of ICT in the primary curriculum.

Secondary school Year 7 tutor groups industry link project

Each of eight Year 7 tutor groups paired up with a local business and developed a project linked to a local company. Widening awareness and understanding careers, the world of work, the local labour market, and the development of presentation and problem-solving skills were the main foci. Considerable effort was invested from the broker to ensure the project was a success so that it has a chance of lasting after the pilot.

The project met a gap in work-related learning in Year 7 and aimed to help in student preparation for work experience albeit at a general level. This activity was not completed at the time of our evaluation.

Primary cross-curricular projects

A number of topic linked, cross-curricular projects were delivered by primary schools with high levels of reported success. Teacher placements that were undertaken during the pilot all have positive outcomes and teachers report significant impact on children in terms of learning outcomes and personal development. However, there is evidence suggesting that schools could/would not embark on these projects again without broker support.

Theatre group

Again, positive reports of school involvement with the theatre group but it is expensive and the broker wants to find ways to fund and deliver it in future – perhaps involving parents.

ICT project week in Years 7/8

This activity was built on needs within the second secondary school where Key Stage 3 ICT was identified through the audit as an appropriate focus and gap in existing provision. The week was linked to 'take your child to work day'.

Constraints

In Year 1, the main factor inhibiting success was lack of suitable supply cover. In particular, concerns were raised about the quality of supply teachers and this was despite EAZ linked training to improve supply cover. There was a lot of money to support this in the area but a lack of appropriately skilled supply teachers. In this area, the nature of the schools (and supply teachers) meant that many could not cope with the children and left the school with

additional problems, so putting the schools off future activities that required use of supply teachers.

In Year 2, in the different area, there was suitable supply cover and this was not a constraint. However, there is a perceived lack of longer-term funding in the area to support professional development placements and this may inhibit future involvement. Some schools clearly see the 'supply cover issue' as more of a constraint than others, and (lack of) flexibility of the school/teachers is seen as being a further future constraint.

It was reported that the nature of the Key Stages 1/2 curriculum means that topic-linked project work could not easily be repeated except on a four-year cycle. This necessitates the development of new projects each year and inhibits continuity.

Levels of teacher workload (especially in the EAZ area) and lack of time to commit to new projects were also cited by several teachers and this can be especially detrimental where this view is held by the key contact in a secondary school. The importance of effective management within secondary schools was raised as an important issue in enabling partnership activity to develop. In the second year it was also reported that communication within one of the secondary schools was problematic, further exacerbating communication difficulties between the broker and the school.

The broker raised the issue of 'school priorities', distinguishing between those schools who see business partnership activity as a 'luxury' and those that will endeavour to 'make room' for it.

The level of clustering was inhibited in Year 1 due to a lack of a coherent rationale for the cluster. This improved in Year 2, with more transition links between schools in the cluster, but still there was little joint planning/working between schools.

Dissemination and sustainability

The broker was very keen to ensure wide dissemination. The cluster itself was used as the first level of dissemination with cluster meetings acting as a means to share ideas and outcomes. At the end of each year there was also a celebration event that brought together the participants and other key contacts in the area, county and region.

The team is currently putting together an accessible evaluation/report pack outlining what has been achieved. This is aimed mainly to encourage new schools to participate in EBP linked activity.

There is also an EBP publication that comes out once a term that has featured articles from the project and will also report on the final evaluation.

The theatre group was seen very much as a one-off activity. Schools said they cannot afford it in future years.

Overall, the likelihood of sustaining progress in the clusters seems to be problematic. The broker supplied contacts and briefing to schools in the Year 1 pilot to maintain their links but this was not entirely successful with few schools maintaining involvement, for a variety of reasons. One key factor was that the broker is viewed as essential to support activity, provide and nurture contacts and undertake much leg-work and administrative support.

In one case the project did continue, but in a different format, and in another the project was repeated but viewed as not nearly as successful as in the first year when supported by a broker. On a more positive note, in Year 2 (without pilot support) one project continued as a fundraising activity realising more than £1,000. This money has been set aside by the school to run a new business link project next year and the money will fund teacher placements and materials. The school has also built education business links and work-related learning into the School Improvement Plan. This school has made significant changes as a result of its involvement in Year 1 of the pilot, largely as a result of the commitment of the headteacher.

Supply cover funding is also viewed as central to future success. It is reported that there is very limited funding within schools to support PDPs and there appears to be some unwillingness to encourage holiday placements.

Where schools do demonstrate some embedding/sustainability, they have more active SMT involvement in the project and in a couple of cases conducted INSET training to disseminate awareness of the pilot/activities within their schools. However, most schools do not feel they will be able to maintain their activity or repeat projects next year if the broker is not involved.

Value added

In both years the quality of much activity was viewed as high but very dependent upon the broker's input, and much of the activity is of a 'one-off nature'. A number of learning outcomes were met in each year from a variety of different activities. It would seem that without support though, both in terms of supply cover funding and broker input, activity levels will diminish.

None of the primary schools in Year 2 had participated in any EBP linked activity previously so there has clearly been significant impact on the level of activity in the short term in the second area. These schools are well briefed and prepared to develop work further (but only if given appropriate support and supply cover funding).

Work experience was enhanced in Year 1 due to the targeted PDPs, resulting in more and improved work experience provision in the town. In addition, it is reported that there is a better understanding between schools and the employer, which also helps to ensure better placement selection and preparation.

Teachers report that PDPs have given teachers an advantage in seeking promotions/new positions. Although there can be a loss to the school and area if a teacher gains a post elsewhere, dissemination widens to other schools.

During the course of the pilot, the system for supporting PDPs was altered to ensure more links to the curriculum. This helped improve the degree of embedding in schools resulting from PDPs.

Demand has increased for teacher placements. However, future funding for supply cover appears to be the main likely inhibitor of take-up, particularly within primary schools, as they report less financial flexibility to fund cover.

Business involvement has generally been reported as being very good once commitment has been agreed. Employers not previously engaged in links with schools have been involved and some lasting relationships may have been developed. Some problems were reported in access (especially among larger employers with 0800 numbers). In a couple of cases, business contacts have been further developed and used by other schools not originally involved. It is likely that the Year 7 tutor group link project will result in longer-term relationships with some of the participating employers.

It was reported that smaller employers have generally been more available and committed than larger employers.

The broker, acting in a very much 'hands on role', has been viewed as highly important in both years, to both deliver and sustain partnership activity. Indeed, it is unlikely that much activity (especially in the primary schools) will be repeated/developed without further input from the broker. It seems that the broker role is more important to primary schools than secondary. There is clear evidence of the importance of the broker in Year 2, especially for the less 'EBL geared up' schools. When the broker withdrew after Year 1, impetus was lost in most cases, and the quality of repeat activities was not maintained. Schools were strongly of the opinion that the broker was necessary, at least for another year, so that the activity became more embedded in school planning.

In addition, though, variation in school commitment to, and interest in, partnership activity is a key factor in determining whether or not a school is likely to sustain links and activities. Funding of supply cover in primary schools also appears to be central to continued involvement.

The value associated with 'clustering' has been from sharing ideas and experiences. There is some evidence that cluster meetings have helped to ensure participants remain 'on track'. However, there was little joint working/planning of activities.

Case Study H

Background

This case study was based in an urban/sub-urban environment, centred around one secondary school and 11 feeder primaries (including one infant and one junior school).

The group was assisted in setting up, independently of the cluster pilot, in early 2000, partly supported by a small amount of EBP funding in order to help address progression and transition issues. The funding was linked to a requirement to consider work-related learning and key skills agendas.

Funding from the DfES pilot then supported the cluster more fully in late 2000, although its main focus remained transition and progression issues.

The EBP acted as broker contracting a secondment from one of the primary schools to act as facilitator (part-time) in Year 1. The facilitator also undertook the first year evaluation.

At the end of the first year the facilitator left and a new appointment (part-time) was made to support the cluster and roll the pilot to a new cluster within the LEA (cluster ii). After Term 1 of the second year, it was decided that the support proposed for the initial cluster was inadequate to sustain the activities of the group and so the rollout to a second cluster was delayed.

Additional time was allocated to the facilitator and another EBP officer was made responsible for launching the second cluster towards the end of the pilot. Again the facilitator undertook the Year 2 evaluation (to be completed).

Objectives

Historically, there had been little communication between the secondary and primary schools. The group was initially set up in order to address this and, ultimately, develop mutual understanding of key skills and work-related learning. At the outset, the purpose of the project was to:

- develop a consistent approach to incorporating work-related learning and key skills into the curriculum
- develop a consistent approach to pupil self evaluation and target setting
- develop a group policy/framework guidelines for work experience delivered in primary schools, and
- develop links between schools to ease transition between Key Stage 2 and Key Stage 3.

These objectives for the pilot remained the same for Year 2.

Main achievements

Over the course of the two years the following projects and activities have been completed:

- an **evaluation of current activity** and involvement in work-related learning/education business links was conducted. This led to a better understanding of what schools were currently engaged in, and identification of gaps in provision
- **development of group**, which resulted in an improved appreciation of cross-phase issues, understanding of work-related learning and transition standards (Key Stages 2 to 3). A one-day key skills conference was held including two to three participants from each school to discuss the purpose and application of key skills and work related learning in Key Stages 2/3
- **'Maths Fest'**, involving mini projects and activities between schools and businesses in town centre targeted at both children and general public. Considered highly successful. Also enabled Year 6 to work with Year 7, so supporting transition
- **mapping and development of history schemes of work** for Key Stages 1/2 to explore the application of key skills/work-related learning and education business links. Training sessions undertaken to work up curriculum planning to incorporate key skills and work-related learning into this area of the curriculum
- **Key Stage 2/3 transition 'passport'**, incorporating basic key skills, designed, developed, printed and distributed to participating primary schools. Two secondary schools were keen to use the passport. It has encouraged a second secondary school to join the group
- **progress in improving Key Stage 2/3 links and communication.** Improves understanding of pupil needs and issues

- **target setting in Years 2-4**, further developed and introduced in several schools in the cluster, was seen as beneficial by participants with an expressed desire to extend
- **produced guidelines for conducting work experience in primary schools**. Pack disseminated to each school and viewed as useful in improving the quality of work experience
- **professional development placements**, with The Newspaper to explore its application in schools
- **'writers workshops' in primary schools**, organised by the broker with activity delivered by schools/writer to small groups in several primary schools.

Constraints

Although there has been significant involvement from a core group of the primary schools, commitment from the secondary school was less forthcoming. It is thought that this is partly due to responsibility within secondary school resting with the Key Stage 3 co-ordinator rather than careers/PSHE/work experience co-ordinator. Commitment to EBL and WRL was limited, with the main interest being in 'between phase' transition. As a result, there was insufficient involvement from other key staff within the school.

The conflicting interests of groups within the cluster disrupted progress to some extent, largely because the cluster 'took on' too much in an effort to satisfy the wishes of all members. In addition, maintaining the group's understanding that the focus on learning objectives for WRL/EBL was intended to only be one element of the group's whole agenda has been a consistent challenge for the broker.

There were also reports that commitment and attendance to meetings was variable and that it was difficult to keep the group focused on a work-related learning/business links agenda. In hindsight, it was also felt that the group may have been too large.

Time and priority constraints within schools were also cited as significant, in particular when schools enter 'Special Measures'. This meant that fully implementing target setting, which required 'one to one' attention, was not achieved and that exploring key skills delivery in other schemes of work was not undertaken.

Supply cover shortages also presented problems in allowing teachers sufficient time to devote to planning and professional development placements. This was especially the case within primary schools where less flexibility for cover was reported. The perceived low quality of supply cover within schools is also important in this regard.

Communicating with teachers proved difficult for the broker (in particular when participants lost interest in the project). E-mail communication improved this situation although did not resolve it.

In the second year, the intention was to introduce another cluster and draw back from the first cluster. However, once left to its own devices, progress of the first cluster was inhibited by the group's failure to hold regular meetings in the Autumn term and agree direction. As a result, funding opportunities in Year 2 were also missed by schools within the first group.

Dissemination and sustainability

There was significant variation in the degree to which schools moved forward. About three to four primary schools have moved towards a whole school approach to work-related learning, and have embedded aspects of business links into school development and curriculum planning. Others, however, have not moved significantly, largely as a result of school management issues or other priorities, and in at least one instance, an unwillingness to enter the ethos of sharing practice and learning.

There were difficulties in developing a sense of independence within group. The group still needs support and the impression is that the work-related learning element may not continue without support from the EBP, both in terms of funding and broking.

The vision for the cluster and agenda content were reviewed and agreed at the last meeting with an expressed commitment to participate in one major 'whole cluster' work-related learning activity per year. The group will continue to facilitate the cluster meetings and will invite the EBP to attend for work-related learning aspects, as appropriate.

In the final term of the pilot, the second cluster was launched in a more rural area. This cluster comprised one secondary school and five primaries, and this smaller cluster has made a positive start.

The pilot will be sustained as far as funding allows through general EBP programmes, consultancy and support for activities. The EBP has recently launched the national 'Excellence in Work-Related Learning Award' by providing funded support for schools working in cross-phase pairs or triplets.

Further enhancing the chances of sustainability, monitoring of work-related learning will be an aspect of the 'Autumn visit' by LEA Link Advisers. This will also help to promote embedding and assess the impact of the pilot.

Value added

It is felt that building in work-related learning and education business links into schemes of work reduces the burden on current teachers and ensures a uniform approach and shared learning objectives across and within schools. It also assists in building in progression between phases and year groups.

Guidelines for quality work experience in primary schools are also thought to add value to work experience undertaken in primary schools, although this has not been tested as yet. There now exists a more common format for undertaking work experience in primary schools, and primary schools have a clearer understanding of their role and rights as 'employers' of work experience students.

Primary schools with a committed deputy head/headteacher report changes in school systems, putting work-related learning in school development plans and drafting school policies (although more assistance is seen to be required here). About a third of the schools exhibit significant changes in the management and organisation of education business links. There is also more communication between one or two schools.

There is heightened awareness of the potential of education business links and work-related learning, and improved understanding of how it can help deliver key skills, and most participating schools are now better 'primed' to make use of the EBP and others in supporting future work and activities.

There is evidence of some schools disseminating outcomes and learning from the cluster in staff meetings.

Some teachers have commented on how involvement in this type of activity improves their chances of promotion (deputy to headteacher) as it demonstrates a whole school and partnership approach to education.

The broker has been seen as essential to hold it all together, providing guidance, independence, knowledge of wider issues and co-ordination. The administrative support role of the broker is also viewed as important. However, there have been difficulties in moving the group forward without driving it as a broker. The cluster has not built a momentum for work-related learning, independently of the broker.

There has been some joint work between schools independent of the cluster, and it is likely that this may develop further and would not have taken place without involvement in the pilot.

Case Study I

Background

This case study involved two groups of schools, one in a rural area and the other close to a large town. One involved a secondary school and eight feeder primary schools (referred to as sub-cluster (i)) and the other, another secondary school and seven feeder primary schools (referred to as sub-cluster (ii)). The two secondary schools are some ten miles apart and in different (but not totally dissimilar) social communities. The composition of the overall cluster did not change over the two years of the pilot.

The cluster adopted a 'split broker' model. The funding was used to fund a range of specialist broker interventions, for example, to:

- work with primary schools
- work on a project to facilitate transition between Key Stages
- support the development and recording of key skills
- develop school education business link and work-related learning policies
- establish a work-related learning club for Year 10 students.

Most of the rest of the funding was either devolved to the secondary schools and spent against an agreed action plan or used to purchase resources (*eg* for primary schools).

The cluster was managed by the local EBP Manager who facilitated termly steering group meetings attended by the key contacts in the two secondary schools, the broker(s) and representatives from the local Government Office and Local Education Authority.

Each secondary school developed an action plan for each of the two years to focus their activity.

Local evaluations were carried out in each year.

Objectives

The initial aims of the cluster were to:

- improve standards in literacy at Key Stage 3 using work-related resources
- raise aspirations by developing more of an awareness of the world of work
- work with parents on raising aspirations and lifelong learning
- improve the motivation of students by developing experience of work
- develop a passport to Key Stage 3 for primary students as they prepare to transfer to secondary phase
- improve understanding of work-related opportunities at Key Stage 4 and provide a better induction process into work-related learning.

As the project developed, and especially in the second year, the emphasis on progression between Key Stages became stronger, as did the focus on key skill development, which was implicit if not explicit in the initial objectives.

Main activities

In the first year, the cluster involved a range of activities focussing in particular on improving the transition from primary to secondary schools, and improving the quality and coherence of education business link activity across Key Stages 3 and 4. There was some joint activity between the two secondary schools, but most of the work took place between the secondary schools and their feeder primary schools.

In the second year, the two groups of schools effectively operated as separate sub-clusters, with the aim of building on the developments in Year 1, although with some change in emphasis. The key activities over the two years involved:

- **introducing EBL activities in primary schools** – eg the ‘Paws in Jobland’ and ‘Make it Real’ resources were purchased and introduced to primary schools. Generally introduced in Year 1, use has not been sustained in all cases in Year 2
- **transition to Key Stage 3** – introducing a ‘passport’ to Key Stage 3. In sub-cluster (i), the passport idea was successfully introduced, with the support of a specialist broker, to all the feeder primary school in Year 6, and in the second year of the project, 170 students entered Year 7 of the secondary school with a record of their non-academic attainment, which they continued to use. In the second year, the passport was further developed to include references to work-related learning achievements. In the second cluster (ii), the concept of the passport was less well received by the feeder primaries, although a personal statement for Year 6 students was developed and completed. However, there was only limited

use of the statement in Year 7. A revised statement was developed in the second year which is more effectively 'owned' by the primaries, and it is hoped that it will form part of a larger portfolio of students' work and attainment providing continuity from Years 6 and 7 and beyond. The relationships between the primaries and the secondary school in this cluster has been revitalised over the two years with a new priority attached to transition within the secondary school

- **developing key skill achievement at Key Stage 2 in the primary schools** – in the second year the passport was further developed in sub-cluster (i), again with the help of a specialist broker, to include key skill achievement. Most of the primary schools in the cluster have used the key skill achievement pack with Year 5 and 6 children, and 300 from five of the schools attended a celebration event at which they were awarded certificates
- **introducing key skills in Key Stage 3** – a resource has been developed with the help of the specialist broker in sub-cluster to record evidence of key skill attainment
- **improved preparation for work-related learning activities in Key Stage 4** – in the second year in sub-cluster (ii), a programme was developed to help Year 9 students to focus on work-related learning options
- **work-related learning for Year 10 students** – a new aspect of the project in sub-cluster (ii) with the funding of a broker in the form of a Youth Worker to help establish a work-related learning club in one of the secondary schools for 20 students in Year 10
- **developing EBL policies in schools** – another specialist broker was engaged to help develop work-related learning policies in the two secondary schools in the first year. Despite producing several drafts, it proved difficult to create a comprehensive document in such a rapidly developing and broadening area. This aspect of the project was not completed in the first year, and resources were diverted to other activities in Year 2
- **developing partnerships with employers** – one of the secondary schools developed a partnership arrangement with a local employer in the first year which continued, but at a lower level, in the second year.

Constraints

One of the secondary schools was under Special Measures in the first year of the pilot and this was generally felt to mean that their attention was mainly elsewhere. The two sub-clusters were based in different geographical areas – some ten miles apart. The different social communities in which they were based, and the

distance between them, were felt to inhibit working together. Other constraints identified by project participants include:

- priorities attached to work-related learning and EBL activities in schools and the time teachers have in schools to devote to such activity
- absences among key members of staff made it difficult to either plan or implement some key activities
- difficulties in obtaining supply cover – both in terms of releasing teachers from class work and finding suitable replacements – less of a problem in Year 2.

Dissemination and sustainability

The results of individual activities have been disseminated to participants and celebration events *etc.* held attended by parents, employers and others. Wider dissemination of the project outputs have mainly been through the local EBP newsletter and website, and through LEA advisers. The Regional Development Agency has funded the dissemination of the key skills materials and the Passport.

The key skill and passport materials are likely to be further used and developed in one of the clusters and have been taken up by other schools in the area and in other parts of the country (including other clusters in the overall project). Funding has been obtained to further develop the key skill achievement pack, although the policy emphasis on Key Stage 4 makes it more difficult to sustain EBL and work-related learning activity for earlier years. Key skill materials are available on the EBPs website.

The area EBP intends to adopt the model of cluster working in other areas, focussing on one secondary school and feeder primaries.

There is a question mark over the sustainability over some of the other activities and whether they will continue in subsequent years – for a number of reasons:

- priorities have changed in the schools
- activities have been adapted and developed
- resources are not available to continue them (*eg* to update or produce more materials and/or train teachers to use them).

Value added

There is clear evidence of more coherence and progression in EBL and work-related learning activities in both sub-clusters – particularly in the area of key skill development through the

development of the Passport. There is more planning in schools, better co-ordination of activities between Year 6 and Year 7, with more collaboration between schools, more co-ordination across years in secondary school and better recording of achievement. Activities in one Key Stage or year lead into others in the next. Work is continuing to develop the approach through from Key Stage 1 to 5.

There is some evidence of greater employer involvement, and a partnership with one of the secondary schools and a local employer was developed in the first year with initial help from the broker and has continued to an extent in the second year. However, it is not clear that the pilot has directly led to significant increase in the quantity of employer involvement.

The activities have contributed to the development of better links between the secondary schools and their primary feeders. Although these links may have improved any way and certainly in sub-cluster (ii) other factors (including a new emphasis on primary/secondary transition in the senior schools) have been instrumental in forging better links, the project has made an important contribution in bringing primaries and their secondaries closer together. However, efforts to build links between the secondary schools have not led to a closer relationship. There is evidence of primary schools working more closely together, *eg* on key skill activity.

The ability to fund specialist brokers is generally felt to have been a major source of added value – providing the expertise and time to help develop activities and materials in conjunction with schools that probably would not have taken place in their absence. Brokers played an important ‘critical friend’ role to schools, asking questions and suggestion solutions to problems, and also provided an important impetus for action.

There is greater awareness of EBL activity in primary schools and a stronger commitment to EBL and work-related learning among senior managers in both secondary schools, although the extent to which the latter can be attributed to pilot activity is unclear.

Primary and secondary schools work together on EBL activities and there is evidence that schools are willing to adapt good practice developed elsewhere to their own environment and work with external agencies (brokers).

Respondents from both primary schools and the secondaries reported that key skills among their pupils have been developed more rapidly and systematically as a result of their involvement with the pilot. As a result, the school report improved self reflection and motivation among pupils and a clearer idea of the skills they have acquired.