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The Extended Project Qualification

(EPQ):

**A case study to determine factors
generating successful post-16 learning
programme enactment**

by

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A thesis submitted in partial fulfilment of the requirements
for the degree of Doctor of Philosophy in Education

University of Warwick

Centre for Education Studies

April 2019

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Acknowledgements

I would like to convey my thanks to my supervisor, Ian Abbott, for all his invaluable guidance, support and positivity over the past years of my doctoral studies at Warwick. In addition, my thanks go to all my friends and relatives, without whose practical reassurance, regular phone calls and offers of help I might so easily have been tempted to give up the challenge. Lastly, I would like to thank my parents, Vivien and Eric Livesey, to whom this thesis is dedicated. Despite the fact that neither of them lived to see me complete my research, they always believed in my ability to get there in the end.

I would also like to acknowledge the contribution so kindly made to this research by Sir Mike Tomlinson, without whose vision, enthusiasm and determination the EPQ might never have existed.

Declaration

I declare that, apart from work whose authors are explicitly acknowledged, this thesis and the materials contained in it represent original work undertaken solely by the author. I confirm that this thesis has not been submitted for a degree at any other university.

Abstract

The purpose of this thesis is to determine key factors generating successful post-16 learning programme enactment, specifically with regard to its management and delivery. The study focuses on a specific example of a Level 3 learning programme, the Extended Project Qualification (EPQ) which is designed to offer students an extended opportunity to develop and demonstrate project management and research skills through creation of a project tailored to reflect their personal needs, aspirations and preferences. They enjoy substantial freedom of choice and breadth of scope regarding project topic and outcome, and the emphasis for assessment is placed firmly on process rather than content. With no prescribed syllabus, EPQ centres are at liberty to vary the programme's content and style to best fit their circumstances and students' needs.

The approach taken to realising the research aims is multiple case study of three different sixth form centres, each highly experienced in running the EPQ. Underpinning the methodology has been the application and adaptation of Ball *et al's* (2012) concept of the policy enactment process – development/encoding, interpretation/decoding, translation/recoding – to form a conceptual framework for learning programme enactment. In addition, investigations have focused on the interaction of enactment 'actors' with the unique mix of interrelated contextual dimensions surrounding the process.

Through the use of constructivist grounded theory coding techniques, findings have emerged that clearly reflect the informants' own views, values and priorities. Outcomes have included an analytical framework comprising sixteen focused codes and conceptual themes, detailed code profiles and rich data from the three centres. A substantial literature review has also been conducted on the EPQ's origins and evolving purpose. Conclusions drawn suggest that successful learning programme enactment is more to do with *how* actors engage in the 'translation' element of enactment than with *what* contextual opportunities or challenges may be available to them.

Abbreviations

AB	Awarding Body
ANT	Actor-Network Theory
AO	Assessment Objective
AQA	Assessment and Qualifications Alliance
ASDAN	Education charity and awarding organisation
BTEC	Business and Technology Education Council diploma
CASE	Cognitive Acceleration in Science Education
C&G	City & Guilds
CBI	Confederation of British Industry
CEI	Centre for Education and Industry, University of Warwick (2013)
CGT	Constructivist Grounded Theory
CPD	Continuing Professional Development
DCSF	Department for Children, Schools and Families
DES	Department for Education and Science
DfE	Department for Education
DfEE	Department for Education and Employment
DfES	Department for Education and Skills
EBacc	English Baccalaureate
EDI	Awarding body acquired by Pearson (2011)
EPBL	Enquiry & Project-based learning
EPQ	Extended Project Qualification
ERA	Education Reform Act
FE	Further Education
GLHs	Guided Learning Hours
GNVQ	General National Vocational Qualification
HEI	Higher Education Institution

HESA	Higher Education Statistics Agency
IB	International Baccalaureate
IVA	Integrated Vocational Assignment
ICT	Information and communications technology
JCQ	Joint Council for Qualifications
NC	National Curriculum
NFER	National Foundation for Educational Research
OCR	Oxford Cambridge and RSA Examination
OECD	Organisation for Economic Co-operation and Development
Ofqual	Office of Qualifications and Examinations Regulation
Ofsted	Office for Standards in Education
PBL	Project-based learning
PISA	Programme for International Student Assessment
PLTS	Personal, learning and thinking skills
Pre-U	Pre-University qualification
QCA	Qualifications and Curriculum Authority
SfBN	Skills for Business Network
SFC	Sixth Form Centre (case study centre)
SLT	Senior Leadership Team
TechBac	City & Guilds Technical Baccalaureate
TES	Times Educational Supplement
TQT	Total Qualification Time
UCAS	Universities and Colleges Admissions Service
VTCT	Vocational Training Charitable Trust
WJEC	Welsh Joint Education Committee

Chapter 1: Introduction

This thesis sets out to examine post-16 learning programme enactment through the study of the Extended Project Qualification (EPQ), a free-standing, Level 3 qualification which offers students the opportunity to investigate a topic or area of personal interest, not necessarily linked to their other curricular studies, through planning, research, execution and presentation of a project. The EPQ, now entering its eleventh year of delivery since national roll-out across England and Wales in 2008-09, has steadily increased in popularity in school sixth forms (independent and state sectors), sixth form colleges, and in some FE colleges. It has similarly gained favourable support from many in the higher education sector as ‘a useful differentiator of talent’ and a means whereby the skills that students need to succeed in higher education can be taught and assessed (Ipsos MORI, 2012). However, this should not be viewed as a qualification solely geared to equipping aspiring undergraduates. In particular, as also noted by Ipsos MORI in their report for Ofqual, it has the capacity to encourage autonomous working and development of knowledge and skills not always nurtured in other learning programmes such as A levels or BTEC; for example, ‘reflection across a wide range of content and issues’ (ibid: 73), enterprise and presentation skills, which are of long-term benefit to all in whatever life journey they choose to undertake.

The purpose of this chapter is to establish the rationale and context for this thesis and to set out the underpinning research aims and questions. It goes on to discuss what may be considered as the three core components of the study, namely:

- a) the Extended Project Qualification – an overview of its current purpose, form and content

- b) the concept of 'enactment' as applied to a post-16 learning programme – forming the conceptual framework for my research, an explanation of why the term 'enactment' has been chosen in preference to 'implementation'
- c) the notion of 'success' in the context of this thesis – how the term has been interpreted and applied and why it is more appropriate than 'effectiveness'.

The chapter continues with a brief overview regarding the range of contributors to the research, including an introduction to the three case study centres involved, together with the centre in which an extended pilot study took place. It concludes by outlining the thesis structure and content of subsequent chapters.

My initial interest in the Extended Project Qualification came about through my involvement as an evaluator for the Qualifications and Curriculum Authority (QCA) of its pilot phase (2006-08) prior to its national roll-out (2008-09), and later as a co-writer of teacher guidance materials for the EPQ at Levels 1, 2 and 3, also for the QCA (2008c). As part of both contracts, I conducted case study research in a number of EPQ centres across England, interviewing senior managers, EPQ centre managers and supervisors, and other stakeholders. I investigated practical aspects and outcomes relating to management and delivery of the programme, as well as individual and institutional attitudes, opinions and recommendations for its future development. I also interviewed EPQ candidates and observed them interacting with their supervisors in formal, taught settings and during less formal, supervisory interactions. Such experiences left me strongly impressed by the sense of ownership, passion, creativity and pride shown by young people engaged in this distinctive learning process and by the highly sophisticated, original and innovative nature of many of their resultant

projects. I also noted unexpectedly high levels of enthusiasm and commitment revealed by participating teachers in a number of centres towards the EPQ and its potential benefits for all involved, despite it being a new – and somewhat demanding – qualification. Consequently, I quickly became an avid supporter of the EPQ and keen to carry out further research into such a fascinating and fulfilling learning programme.

But what direction to take? What aspects of the EPQ as a learning programme had yet to be investigated and would benefit from detailed study, given that my desire was to be able to make a useful contribution not only to existing educational research but also to those tasked with EPQ management and delivery? On scrutinising the relevant literature, it became apparent that the EPQ had been the focus of only a handful of academic journal articles since 2006, although it had regularly featured in governmental documents as well as several books and national/international reports concerned with post-16 curriculum and qualifications; for example, the Nuffield Review of 2008, reports by the CASE Network for the EU on lifelong learning (CASE Network, 2009), NFER (Lamont *et al.*, 2014) and Ipsos MORI (2012), and Huddleston & Unwin's text on teaching and learning in the FE sector (Huddleston & Unwin, 2013). Searching more widely, the Times Educational Supplement and other media have continually reported on the EPQ's growth and success (TES: Stewart, 2010/2011; Exley, 2012; Taylor, 2015; Reader, 2018) whilst numerous examples of teacher/student guidance materials, reports and other resources can be found online, particularly on the websites of awarding bodies responsible for the qualification (as at September 2018, there are six: AQA; ASDAN; City & Guilds; OCR; Pearson Edexcel; WJEC).

To date, EPQ-related research has tended to centre mainly on aspects of the student 'participant's' experience of the qualification, with findings reflecting student learning and their views on the qualification, together with perceived

benefits of participation; see, for example, Yeoman (2017), Cartwright (2013) and Daley & Pinot de Moira (2010). In addition, there is a body of EPQ-related research reports published by Cambridge Assessment that present findings based on statistical data and longitudinal scrutiny. The range includes Gill & Rodeiro's report on the predictive validity of Level 3 qualifications (2014), which considers the ability of the EPQ to predict success in higher education courses alongside that of three other project-relevant qualifications – the Cambridge Pre-U, the International Baccalaureate (IB) and the BTEC Diploma.

On reflection, what appears to be less evident in terms of the type of research undertaken so far is any study of the perceptions and experiences of 'contributors' and 'stakeholders' (see Section 1.3.2) involved in or affected by the EPQ learning programme – and this is an area which has particularly intrigued me since those early days of investigating the EPQ. An advantage of my being an educational researcher and evaluator is that my work has furnished many opportunities to maintain contact with some of the original case study EPQ centres, to sustain dialogue with key players and to observe how programme content, management and delivery has evolved over time. I have also been able to investigate relevant practice in other schools and colleges and, through discussion, to seek out their reasons for delivering (or not) the EPQ. Gradually, I have become particularly interested in the ways in which diverse internal and external factors (such as funding priorities and the constant shifts in governmental policy regarding post-16 curriculum and qualification reform) influence institutional and individual thinking about the qualification, and what may be the subsequent effects on practice and attitudes. How do contextual or environmental aspects and characteristics affect the ways in which a centre responds and, ultimately, to what extent might this be the determining element that sees one centre achieve successful EPQ learning programme enactment whereas another struggles to survive?

Over time, a number of questions have emerged, forming the starting-point for development of my thesis research questions (Section 1.1). For example:

- How is it that the EPQ has survived, and continues to grow significantly in terms of entries per year, during a period of such unprecedented scrutiny of: a) content and assessment within post-16 examinations and qualifications; b) financial uncertainty in the post-16 sector; and particularly, c) ever-shifting governmental policy regarding 14-19 curriculum reform, as most recently evidenced in the re-emergence of linear A levels?
- What is it that continues to attract or, in some cases, deter post-16 institutions to run such a distinctive programme – what do they perceive to be its benefits and value to their students, staff and the wider community?
- What encourages centres to incorporate the EPQ within their curriculum offer year-on-year, despite the inevitable priorities, pressures, constraints and conflicts regarding staffing and resourcing, fluctuating budgets and the competing demands of other subjects and qualifications?
- How does the EPQ manage to compete against – or maybe it would be more accurate to say ‘complement’ – other learning programmes/enrichment activities that may be already offered or under consideration for inclusion?

And, most importantly:

- What factors help to sustain its successful enactment and maintain its viability in so many centres?

1.1 Research aims and questions

The fundamental aim of this study is to ascertain what may be considered as key factors that help generate successful post-16 learning programme enactment, specifically with regard to the management and delivery of the Extended Project Qualification (EPQ). The EPQ has been selected deliberately because of its distinctive nature, in that it possesses characteristics unlike other qualification-focused learning programmes commonly encountered in the post-16 sector, such as A levels and BTECs. For example, its purpose and structure (see Section 1.2.1) clearly encourages – if not necessitates – centre managers, participating staff and students to practise greater levels of autonomy, flexibility, creativity and innovation in its enactment than in most other learning programmes; moreover, although there must be adherence to the qualification criteria and assessment objectives, there is no requirement on centres to follow a prescribed curriculum. Consequently, the EPQ offers considerable scope for achieving my research objectives of observing and comparing, within and across institutions:

- how it is enacted
- who and what may influence change in its enactment over time, and in what ways, and...
- why and when certain interventions may or may not occur.

In order to achieve these objectives, my research focuses primarily on interrogating evidence gathered from three case study centres, all of which are highly experienced in running the EPQ, in order to identify some of the influential factors (both internal and external) crucial to successful EPQ enactment. In effect, my intention is to study how EPQ participants, contributors and stakeholders within these centres *interact* with the programme at every point in its 'enactment' – this being a four-stage process incorporating development, interpretation, translation and operation (adapted

from Ball, Maguire & Braun, 2012) – and to determine how they may be helping thereby to shape and secure its future.

In line with my selected methodology – constructivist grounded theory – the intention behind this research study has not been to test an existing theory but to seek to derive – or define and construct – theory from data gathered, then analysed and reviewed, via a range of relevant sources (Cohen, Manion & Morrison, 2018; Charmaz, 2014). Although the small scale of the research sample may inevitably limit the generalisability of any ensuing findings, it is nevertheless hoped that outcomes from this study will serve to indicate worthwhile topics for future research into the learning programme enactment process. Moreover, the practical approaches and observations gleaned from research respondents may be helpful for encouraging successful practice in both existing and future EPQ centres. Lastly, my use of an adapted version of Ball *et al's* (2012) 'policy' enactment process to underpin the study (described in Section 1.2.2) offers an excellent opportunity to assess the extent to which Ball's suggested framework may be equally successfully applied to post-16 learning programme enactment.

- 1.1.1 Research Questions

Research Question 1: *Why do some post-16 institutions (school-based sixth forms; FE colleges; 6th form colleges) appear to be more successful than others in delivering and sustaining the Extended Project Qualification as part of their post-16 curriculum provision?*

My overarching research question emerges from my experience as an evaluator and observer of EPQ centres and programmes across England since the EPQ's pilot phase, combined with my awareness that there have always been a number of school sixth forms and other further education institutions

that have either chosen never to introduce the programme, despite the EPQ's evident gain in popularity nationally, or have ceased to offer it after having run it for a period of time. This main research question, which underpins my investigation into the possible factors generating successful learning programme enactment, has in turn prompted a number of sub-questions:

- a) *How do different centres – and the various communities associated with them – ‘interpret’ and ‘translate’ the EPQ and how does this impact on integration of the qualification into their post-16 curriculum offer? What is perceived to be its fundamental purpose; what influences this belief; what conditions are considered essential for its effective delivery - when and how it should take place; for whom should it be made available; what are the intended potential learning outcomes and benefits (both medium term and lifelong) for all participants, contributors and stakeholders?*
- b) *How might a centre’s aims and objectives for introducing the EPQ into its existing post-16 curriculum ultimately affect its successful enactment? Strategically, for example, is it intended to add value, bridge a gap in the existing curriculum offer or perhaps build on what is already available – and who decides? To what extent is this intention communicated and understood by the various internal and external communities associated with the centre?*
- c) *In what ways might the underlying preconceived notions of individuals or groups either be contributing to the successful enactment of the EPQ or influencing a centre’s reluctance to introduce the EPQ – or be contributing to its eventual withdrawal? Who are these individuals and groups and in what ways might their views and/or actions be seen to be permeating the centre’s vision, values and practice regarding the EPQ? To what extent are they influenced by or representative of a centre’s overall culture and ethos?*

d) *How does the centre's existing curriculum practice and provision, together with its institutional policies, values and vision for teaching and learning, influence its interpretation and translation of the EPQ – and vice versa? To what extent have the EPQ's distinctive characteristics been shaped to fit the existing teaching and learning priorities and practices? What evidence is there to show that the distinctive characteristics of the EPQ have in turn influenced teaching and learning in other parts of the curriculum?*

Research Question 2: *What was the EPQ's intended purpose and how, if at all, has this altered over time?*

My second research question arises from the need to be fully conversant with the contextual details surrounding the EPQ and its development over time in order to avoid misinterpreting data or making incorrect assumptions around its enactment due to lack of knowledge. My intention is to build an in-depth understanding of the qualification's origins and purpose, its historical and political context, and to investigate any significant changes that may have taken place, for example with regard to EPQ specifications or teaching materials and advice supplied by the respective awarding bodies. In effect, I need to be able to appreciate what has come into each of the case study institutions regarding the EPQ, having been developed 'outside' by various means, in order to more accurately assess how that institution may have been led to interpret and translate the EPQ in the way it has – which in turn will have influenced decisions made regarding its operational practices and procedures.

In order to address the question in sufficient depth, a range of contributory topics need to be considered, including:

- the objectives of, and any key influences on, policy makers involved in the EPQ's original and continued development, including: New Labour's desire

for educational reform leading up to the Tomlinson Review (DfES, 2004a) as described by Hodgson & Spours (1999), Bangs, Galton & MacBeath (2011) and Abbott, Rathbone & Whitehead (2013); initiatives aimed at improving social mobility; other project-related qualifications such as the International and Technical Baccalaureates and, more recently, Technical Levels

- differing approaches taken by awarding bodies towards the EPQ and how they may have interpreted and translated the EPQ's generic specifications, assessment objectives and teaching materials, differently over time
- how awarding bodies' presentation of the EPQ, for example via online information and sources of advice, may have (intentionally or unintentionally) influenced centres' interpretation and translation of the qualification (Daley & Pinot de Moira, 2010)
- how Higher Education Institutions (HEIs) and employers perceive the EPQ as a potential asset and vehicle for progression into further study and employment (Kotecha, 2010; Ipsos MORI, 2012).

Research Question 3: *How has planned change (namely, the introduction of the EPQ) led to unplanned change over time?*

This question, prompted by the work of Sugrue (ed., 2008), will primarily be addressed within my investigation of EPQ learning programme enactment in the three case study centres and the pilot centre. However, through reflection on the impact of change regarding the wider, national policy context (Research Question 2), it is also hoped to be able to make some useful suppositions in my concluding chapter, regarding:

- the extent to which the EPQ has been and still is being delivered *as intended*;

and:

- the future for the EPQ in light of its interpretation and translation to date.

1.2 Core components of the study

- 1.2.1 The Extended Project Qualification

The EPQ is a Level 3 qualification, available to post-16 students in England, Wales and Northern Ireland, which is equivalent to half an A level and carries more UCAS points than an AS level, being closer to the standard of work required at A2 level. The two tariffs set out below (*Table 1a*) present a comparison of the qualification's status in terms of UCAS points before and after 2017. No prior qualification, knowledge or understanding is required for entry to the EPQ unless designated by an individual institution. Introduced for first teaching in 2008-09, the EPQ was originally offered as either a standalone qualification or as a key component of Principal Learning in the now defunct suite of 14-19 Advanced and Progression Diplomas. However, the EPQ and its equivalent project qualifications at Levels 1 and 2 (Foundation and Higher Projects) are now described by Ofqual (2017: 46-7) solely as 'free-standing, single unit qualifications' in which the evidence for assessment of candidates' knowledge, skills and understanding can be presented in various forms or outcomes, depending on individual preference. Typically, such outcomes may constitute:

- a report detailing findings from an investigation, experiment or a study
- a dissertation or extended piece of writing (of around 5,000 words in length)
- a solo or group performance/event, perhaps organised as a charity fundraising event, with written report of around 1,000 words
- an artefact, such as a sculpture or a photographic exhibition, or a design; again, these must be accompanied by a written report.

Significantly, should students wish to work as part of a group for their EPQ, they must still be treated as individual candidates for the qualification. Each is required to play a specific role within their group, so that their individual contribution to the outcome can be clearly identified and recorded. Each is responsible for generating their own set of project aims and objectives, and for undertaking relevant research, and will also be expected to produce authentic evidence and make an individual presentation as part of the assessment process.

i) Tariff post-2017							
EPQ	A*	A	B	C	D		E
AS level			A	B	C	D	
New tariff points	28	24	20	16	12	10	8

Source: UCAS (2018)

ii) Tariff pre-2017						
EPQ	A*	A	B	C	D	E
AS level		A	B	C	D	E
Tariff points	70	60	50	40	30	20

Source: TES (2012)

Table 1a: UCAS Tariff Points for the EPQ

The primary purpose of the EPQ is to offer candidates an extended opportunity to develop and demonstrate their project management skills (UCAS, 2018), through creating a project tailored to reflect their individual needs, preferences and aspirations. To this end, each student is encouraged to act as independently as possible when making choices regarding the design, content and outcome of their project, as long as their centre and awarding body is in agreement. Such substantial freedom of choice and breadth of scope characteristically distinguishes the EPQ from other assessed projects, for example, the project constituting part of an International Baccalaureate (IB). Virtually no constraints are placed on what a student may choose for their EPQ

topic as long as it is realistic and offers sufficient potential for meeting all learning outcomes and for addressing the qualification's assessment objectives. Thus, they might decide to develop or extend knowledge or skills relating to one or more of their other subject study areas, as in an IB, but are equally at liberty to pursue 'an area of personal interest or activity outside their main programme of study' (Ofqual 2017: 47) such as a sport, charity volunteering, an issue of local, national or global concern, a business enterprise or career possibility. Even in the case of an EPQ studied as part of a C&G TechBac programme, candidates are strongly encouraged but not required to relate their project topic to the technical subject within which they are specializing (C&G, 2018: 6). Similarly, there are no restrictions on topic choice for EPQs taken as part of an AQA Baccalaureate or Technical Baccalaureate (AQA, 2015: 3).

Because the EPQ focuses on enabling each student to develop and apply the skills involved in the *process* of creating, managing and reviewing a project, rather than on the *content* of the project itself, no actual subject content or syllabus is prescribed for this qualification. Rather, there are a recommended series of learning outcomes to which all EPQ students should aspire (Ofqual, 2017: 46-7). These include: being able to 'extend their planning, research, critical thinking, analysis, synthesis, evaluation and presentation skills'; to build and apply problem-solving and decision-making effectively, and; to develop confidence in using relevant resources, including digital and e-technologies. Strong emphasis is laid on nurturing the ability to demonstrate creativity, enterprise and innovation, and to use initiative, with a view to becoming 'critical, reflective and independent Learners' who not only understand how to transfer skills developed in the EPQ to other areas of post-16 study but also how such skills may be applied and valued longer term: for example, in future training, HE or employment contexts.

The extent to which an EPQ can be said to be a true example of project-based learning (PBL) may be contentious for some teachers and theorists, given that the project brief for PBL activities, including how and where they are to be undertaken, tends to be set *for* rather than *by* participating students, and that such projects are often structured to incorporate learning across a range of subjects. Moreover, for some teachers, PBL is about using projects more as a vehicle for learning than for assessment (Gilbert, 2016: 48-49). However, David Leat, in his recent book on enquiry and project-based learning (2017), describes the EPQ as having characteristics that are more in line with what may be termed 'enquiry & project-based learning' (EPBL) than with PBL alone. Moreover, he considers that the EPQ demonstrates that EPBL activities can be readily assessed in public examinations (ibid: 50). This issue will be further considered in the next chapter of this study in an attempt to clarify the extent to which the EPQ may be said to have influenced the perceptions of educational practitioners, policy makers and theorists regarding the practice of incorporating projects into post-16 programmes of study, alongside the purpose and potential benefits to be gained from doing so.

- **Role of the EPQ Supervisor**

Interestingly, Thomas' (2000) review of the literature on PBL, as quoted by Leat (2017: 43), points out that a defining feature of the model propounded in the literature is the use of teacher 'facilitation but not direction', coupled with giving students 'the opportunity to work relatively autonomously over extended periods of time'. This is also firmly the case with regard to the EPQ. Each student is allocated to a supervisor or mentor/tutor who is not necessarily an expert in the field they hope to investigate via their project. The supervisor's primary role is to advise and support throughout the various stages of the learning programme, negotiating, monitoring and facilitating but specifically not telling students what to do – such as suggesting project topics,

themes or titles – or giving written feedback. In most cases, EPQ supervisors are qualified teachers, although in some centres, the services of employers and non-teaching staff members such as librarians, laboratory technicians and administrative staff are also called upon. Inevitably, some new supervisors may find it a challenge to adapt to a facilitating role when they are more used to directing. They may benefit from guidance and training in the role, usually supplied by their centre's lead EPQ Coordinator who is also entitled to supervise projects.

Although some supervisors may only be required to work on a one-to-one or small group basis with their EPQ students, in centres such as those with large EPQ student cohorts and/or formally timetabled EPQ sessions, supervisors may be responsible for working with groups of twenty or more candidates. They may be expected to deliver regular whole-group/class teaching slots alongside their individual student mentoring and support duties, and will almost certainly be required to undertake a large amount of EPQ assessment, including moderating and standardizing, once students have submitted their project outcomes and supporting evidence.

- **EPQ structure, process and content**

With no prescribed syllabus, the EPQ's content and style of delivery must inevitably vary between centres. Even so, all must ensure that their EPQ candidates have access to 120 guided learning hours (GLH), of which, according to UCAS (2017), approximately 50 hours should constitute 'taught time' (more usually referred to as the 'taught element' of the qualification) and 70 hours be given to 'preparing for assessment' (i.e. independent learning, including one-to-one supervisory sessions). Awarding bodies offering the EPQ are allowed considerable flexibility in this respect, however; thus, OCR's (2017) EPQ Specifications note they have made a recent reduction in the time required for the taught element from 50 to 30 GLH in order to improve the

manageability of the qualification for their centres, with a consequent increase in independent learning time to 90 GLH (2017: 4). This change brings them into line with AQA, C&G and ASDAN (2018), whereas Pearson Edexcel (2008) and WJEC (2015) continue to recommend 40 GLH and 45 GLH respectively for the taught element. Nevertheless, all six ABs stipulate that the Total Qualification Time (TQT) for the EPQ, combining both the overall GLH and hours spent in preparation, study and assessment (OCR: 9), must be 120 hours.

Any institution offering the EPQ has the freedom to determine, within reason, programme timing, timetabling, content and overall structural issues – basically, who will deliver the EPQ's various components, what these should be, and when, where and how they should occur. Many decisions will depend on distinct enabling and/or inhibiting factors such as staff availability and the perceived needs, priorities and aspirations of a centre's various internal and external communities, including its (potential) EPQ student cohort. In addition, any guidance, resources or training received from their chosen AB may prove strongly influential. The programme can be enacted at any point in Years 12 or 13, either during one academic year only or across both years. So, in the latter case, students can be prepared in the Y12 summer term and then use the vacation for independent research and writing before submitting their completed projects for assessment in the late autumn or spring of Y13 for assessment and moderation in January or June.

Although some centres might prefer to induct students into the EPQ via an intensive 'taught element' period, in order to fully equip them for embarking on extended periods of independent learning, it is more likely that teaching sessions on various relevant topics will be scheduled to take place throughout the programme, as and when appropriate. The overall process of completing the qualification (as shown in *Figure 1.1* below) clearly demonstrates that the two components should of necessity be closely intertwined, particularly as the

taught element is intended to support students through each stage of the EPQ process, regardless of how or when it may occur for each individual. With a recurring PLAN-DO-REVIEW approach at its heart, it is unusual for any of the five stages portrayed therein to be experienced only once, or in the exact sequence shown, or even in complete isolation one from another. For example, it is not uncommon for students to: (1.) select a topic and produce a project plan; (2.) begin to reflect on what they already know about the topic; (4.) undertake some initial primary and secondary research on the topic and then, even begin writing. Then, having encountered a more appealing or promising interest area during their research, (1.) decide to begin the process all over again, but this time investigating the newly-discovered topic. Throughout, (3.) taught element sessions delivered by their supervisor and/or others, help to provide essential knowledge and skills development in key areas such as project management, research techniques including referencing and avoidance of plagiarism, how to identify the skills needed to complete one's project, and communication skills, including effective writing and presentation.

For all EPQ candidates, four main action sets or milestones must be achieved in order to fulfil the qualification's assessment requirements. These are:

1. To establish a **project brief**, including topic/theme, title, project outcome and design plans, underpinned by a written rationale and set of aims and objectives, for which approval must be gained from one's centre
2. To ensure regular **review meetings** take place with the supervisor and that detailed records are kept, evidencing their content: particularly: a) following project approval, b) at mid-project, and c) at end-of-project

3. To complete the **final project outcome**, together with supporting evidence, any required standardized record forms, and evaluation of one's own performance, the learning gained and skills used/developed

4. To deliver a **presentation** to a non-specialist audience, using media appropriate to the project, in which one outlines and evaluates the project outcome together with its development process, reviews one's own performance against the stated aims and objectives, and invites feedback and questions from the audience.

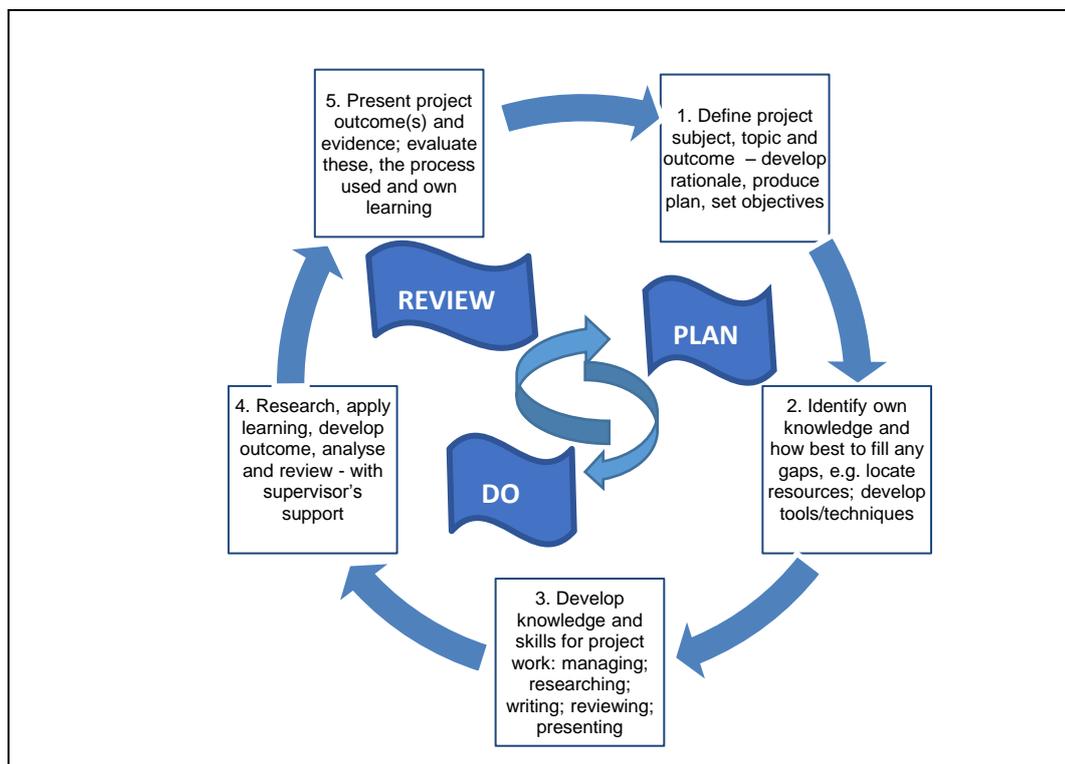


Figure 1.1: EPQ process summarised

- **EPQ Assessment**

Once all their EPQ work has been completed, candidates must submit a portfolio of required evidence for internal assessment, after which a sample is externally moderated by each centre's awarding body. Generally speaking, the

evidence requirements for the EPQ are very similar across all six ABs offering the qualification, and candidates are at liberty to compile all materials into a single written Project portfolio or e-portfolio, or a combination of the two, if they so wish. There is considerable scope for further demonstrating initiative and creativity in the portfolio, which primarily consists of the following items:

- a) The **Final Project Outcome** or **Project Product** – including written report where required, the project outcome itself, unless in an unsuitable format, e.g. artefact or performance; in which case, students might include photographic samples or statistical data to illustrate process and final results
- b) **Project Progression Record**, also known as the **Production Log** or **Activity Log** – including written records (with supervisor's comments) of project plans and proposed timeline, research undertaken, skills taught, resources used and evaluated, substantive advice received and actions taken, and candidate's final evaluation
- c) **Assessment Record** – including standardized forms regarding Project Proposal/Verification of Topic and Title and centre authorization, Candidate Record Form, records of initial, mid-point and final project reviews, Assessment Mark Sheet and supervisor's commentary on strengths/weaknesses per AO
- d) **Presentation Record** and other evidence – including commentary and slides used, examples of supervisor/audience feedback, witness statements, record of resulting modifications made to project, and supervisor's record of the event.

Internal assessment is normally undertaken by supervisors who mark the candidates according to how well they have demonstrated their ability in each of the four Assessment Objectives (AOs) listed below (*Table 1b*). Each AO is closely aligned to one of the different stages of the project process: **AO1** –

Manage; AO2 – Use resources; AO3 – Develop and realise; AO4 – Review.

Particular emphasis is placed on **AO3** (Develop and realise) in terms of the percentage weighting ranges provided. All six ABs currently offering the EPQ adhere to Ofqual’s criteria in this respect, with five of the six stating the relationship between the four AOs and the overall qualification unit as being: AO1 (20%); AO2 (20%); AO3 (40%); AO4 (20%).

	Assessment objective	Weighting
AO1	<i>Manage</i> Identify, design, plan and carry out a project, applying a range of skills, strategies and methods to achieve objectives.	15–25%
AO2	<i>Use resources</i> Research, critically select, organise and use information, and select and use a range of resources. Analyse data, apply relevantly and demonstrate understanding of any links, connections and complexities within the topic.	15–25%
AO3	<i>Develop and realise</i> Select and use a range of skills, including, where appropriate, new technologies and problem solving, to take decisions critically and achieve planned outcomes.	35–45%
AO4	<i>Review</i> Evaluate all aspects of the extended project, including outcomes in relation to stated objectives and own learning and performance. Select and use a range of communication skills and media to present evidenced project outcomes and conclusions in an appropriate format.	15–25%

Table 1b: EPQ Assessment Objectives (source: Ofqual, 2017)

In most cases, AB specifications provide additional marking criteria containing ‘levels of attainment for the knowledge, skills and understanding that the learner is required to demonstrate’ (OCR Specifications, 2017: 14). In such cases, mark bands and band descriptors or statements are provided for each AO in order to assist internal assessors with their task. Some are particularly detailed, breaking down each AO into its component parts with associated statements per mark band. Further consideration is given in Chapter 2 regarding the varying resources and guidance provided by ABs for their EPQ centres, and the extent to which this may impact on EPQ enactment in any particular centre.

- 1.2.2 The concept of 'enactment'

'Enactments are collective, creative and constrained and are made up of unstable juggling between irreconcilable priorities, impossible workloads, satisficing moves and personal enthusiasms.'

(Ball *et al*, 2010: 71)

The second core component underpinning this study emerged from early investigations made into the literature concerning education policy and policy processes, prior to developing my research design and fieldwork instruments. I was primarily interested to discover evidence of ways in which various types of policy might impact on the management and delivery of the EPQ learning programme, and thereby potentially be influencing its success. Thus, during my research, I encountered Bell & Stevenson's revised framework for school leaders (2006) engaged in analyzing policy (2015: 146-150), in which it is powerfully argued that:

'...the work of those within educational institutions and the various ways in which that is experienced cannot be understood without being located in a context that acknowledges the centrality of policy and of the ideologies that shape policy.' (2015: 146)

The authors' articulation of the vital interrelationship between policy, practitioners and pedagogy made a profound impact on my approach to this study, in that it has forced me to think deeply about the potential impact of contextual factors on the perceived success of a learning programme such as the EPQ – but what might these factors be? More importantly, the intentional use of the term '*policy enactment*' in place of '*policy implementation*' in their revised framework (*Figure 1.2*) immediately calls into question the appropriateness of the term '*learning programme implementation*'. I had always passively accepted this to be correct – but what does it represent and

would ‘learning programme *enactment*’ in fact be a more accurate description of the processes involved?

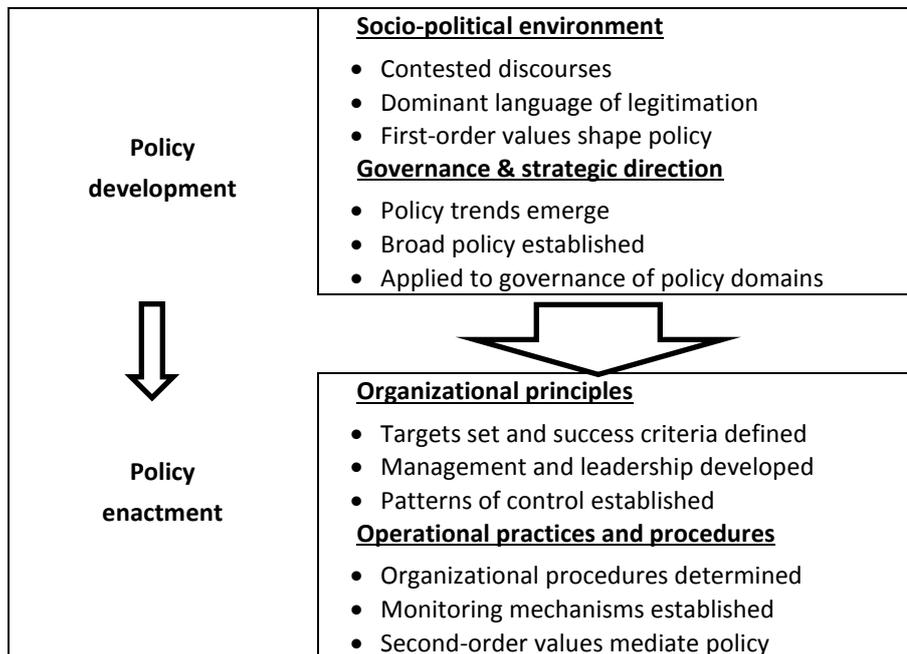


Figure 1.2: From policy development to policy enactment (Bell & Stevenson, 2015)

For Bell & Stevenson, enactment is used to challenge the notion that ‘policy is made in rational ways’ (ibid: 148), a view more traditionally associated with policy implementation. Moreover, their adoption of the term ‘enactment’ is intended to incorporate – and extend – the use made of policy enactment by Ball, Maguire & Braun (2012).

• **Implementation or enactment**

For Ball *et al*, policy enactment is a dynamic, complex and creative process of ‘making sense’ in a non-linear, non-sequential manner, whereby policy is: ‘put ‘into’ practice – in relation to history and context, with the resources available ... it is always a process of ‘becoming’, changing from the outside in and the inside out’ (ibid: 3-4). In contrast, they argue that policy implementation is represented in many studies as less of a ‘process’ and more of a ‘top-down’ or ‘bottom-up’ procedure for making policy work; in this way, they suggest, policy implementation is akin to being a means of solving a problem related to a

defined educational issue. Unlike enactment, implementation fails to take into account the impact of interactions between the different communities of practice co-existing in an institution, together with its histories, environment and culture, the professional development and expertise of its teachers with their varying backgrounds, beliefs and attitudes to teaching and learning, and the potential input of its students (2012: 5). Implementation tends to imply that all schools/colleges, all teachers and all policies are basically the same (ibid: 4).

It is important to recognise that Ball *et al's* understanding of 'enactment' is framed by an earlier assertion of Ball regarding policies; namely, that:

'Policies do not normally tell you what to do, they create circumstances in which the range of options available in deciding what to do are narrowed or changed, or particular goals or outcomes are set.'

(Ball, 1994: 19)

To them, policy is 'active' rather than 'passive' and its enactment must incorporate: 'discursive processes that are complexly configured, contextually mediated and institutionally rendered'. It is done by and to teachers, who become both 'subject to and objects of policy' (ibid: 3) and, by creatively engaging with both policy and the process of its enactment: 'They change it, in some ways, and it changes them' (ibid: 48). In light of personal experience, it would seem perfectly reasonable to suggest that Ball *et al's* portrayal of 'policy' and 'enactment' characteristics applies equally well in the case of post-16 learning programmes, particularly one offering such innate flexibility, contextual adaptability and creative opportunity as does the EPQ. The EPQ is fundamentally about process and skills development and has no written subject content or syllabus although it is 'confined' by Ofqual criteria upon which Awarding Body specifications, including assessment objectives, have been built. In keeping with Ball *et al's* description of policies given above,

although the specifications ‘do not normally tell you what to do’ they may certainly be responsible for narrowing or focusing the range of options and goals to be set and attained. They thereby help practitioners and participating students to make sense of the learning programme as they put it ‘into’ practice in their specific institutional context. In effect, based on the evidence proposed by Ball *et al*, it would appear that centres ‘do’ the EPQ as a process of *enactment* rather than *implementation*. Therefore, throughout this research, reference will be made to learning programme enactment which is understood to be a process:

‘...involving creative processes of interpretation and recontextualisation – that is, the translation of texts into action and the abstractions of [*policy*] ideas into contextualised practices...’ (2012: 3).

- **Interpretation and translation**

How Schools do Policy draws attention to the importance of, and the varying roles played by, the different ‘actors’ or ‘enactors’ within policy work (ibid: 7), as well as to the effects that power ‘in a relational and situated way’ must necessarily have on the policy enactment process (ibid: 9). It is through such actors/enactors, functioning both as individuals and collectively within different communities of practice, that *interpretation* and *translation* – namely, ‘the key parts of the policy process and of the articulation of policy with practice, which are suffused by relations of power...’ (ibid: 43) – take place.

In relation to policy enactment, Ball *et al* have developed what they call a ‘heuristic distinction between interpretation and translation’ (ibid: 43).

Although the terms may be used interchangeably at times, and both are to do with meaning-making, each is subtly different in its intention:

‘Interpretation is an engagement with the languages of policy, whereas translation is closer to the languages of practice. **Translation** is a sort of third space between policy and practice.’ (Ball *et al*, 2012: 45)

Interpretation is to do with making sense of what comes into an institution, for example through the initial reading of texts or other externally-produced, externally-*encoded* materials. It is a form of situated *decoding*, in other words it is done in relation to the culture and history of a centre, and is influenced by the actors’ backgrounds, attitudes and opinions (ibid: 43). As Ball observed in 1993, it is both retrospective and prospective (cited in 2012: 43) and, in the context of policy enactment, is about key actors considering the implications of policy against the politics, priorities and possibilities of a particular institution, and then using strategic means such as presentations through which to engage staff and encourage ownership (ibid: 44).

Translation, for Ball *et al*, is: ‘an iterative process of making institutional texts and putting those texts into action, literally ‘enacting’ policy...’ (ibid: 45). It is to do with using creativity and tactics such as meetings, talk, events and production of artefacts in order to *recode* policy into:

‘...materials, practices, concepts, procedures and orientations ... (Buckles, July 2010: 18) ... in relation to specific contexts, recipients and subject cultures (Spillane *et al.*, 2002) and the *logics of practice* of the classroom (Hardy & Lingard, 2008: 66).’ (ibid: 45)

The extent to which ‘interpretation’ and ‘translation’ in learning programme enactment (and particularly with regard to EPQ enactment) are fully commensurate with the terms as used by Ball *et al* in policy enactment will no doubt emerge during the process of completing this thesis. Already, there appear to be many points of similarity, which further serves to justify my decision to adopt learning programme *enactment* rather than implementation. Nevertheless, there are bound to be some differences, given that a learning

programme is not a policy, and vice versa. In particular, as demonstrated in the Venn diagram below (*Figure 1.2*), although I agree with Ball *et al* that the enactment process is non-linear and non-sequential, I would suggest that the EPQ is constantly being interpreted and re-interpreted by a wider range of actors/enactors – including students – than appears to be the case with policy enactment. Contributors, participants and stakeholders join the EPQ ‘journey’ at many different points and in many different forms and must both interpret and then translate in order to make sense of the programme for themselves, constantly taking into account the contextual opportunities and constraints surrounding them.

Finally, I have included in the EPQ enactment process diagram below (*Figure 1.3*) a fourth element: **Operational practices and procedures**. The title is drawn from Bell and Stevenson’s framework for analysing policy (2015), shown earlier in *Figure 1.2*, and attempts to capture the fact that all learning programmes, even one as unconstrained as the EPQ, must be compliant in relation to awarding body specifications and requirements such as the use of prescribed Project Progression Records and Assessment Grids, as well as to the timing of externally-set events such as submission dates. The diagram forms the basis for the conceptual framework underpinning this research. Note also the ‘contextual dimensions’ that surround the entire enactment process, acting upon it and interacting with it in both intended and unintended ways. This concept will be further considered in my next Chapter (Section 2.3.2).

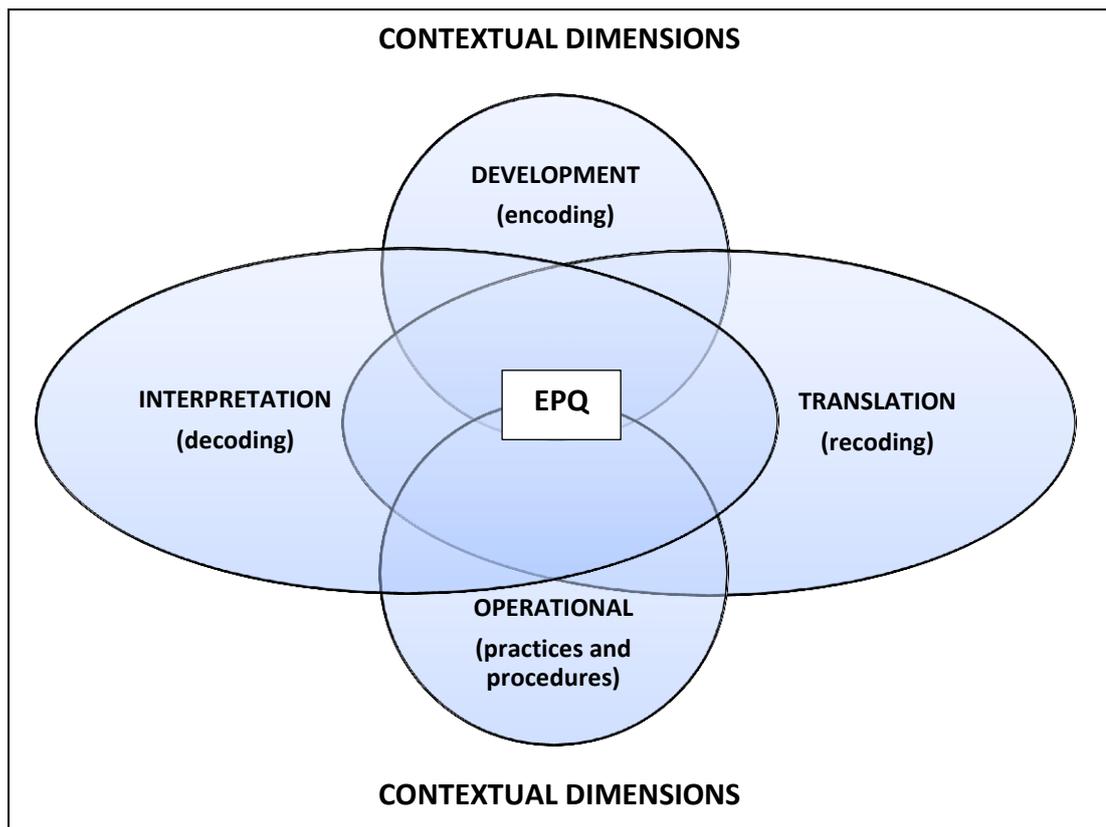


Figure 1.3: EPQ enactment process

- 1.2.3 The notion of 'success' in this research

Regarding successful school leadership, Pashiardis & Johansson (2016) observe that there is a tendency for the terms 'successful' and 'effective' to be used interchangeably by many researchers in their particular field. This is understandable, not least when one attempts to distinguish between the definitions provided for each term in respected dictionaries, where words and meanings tend to overlap or may even be replicated in some instances. Compare, for example, online definitions provided in the Oxford English Dictionary (June 2017) with those found in the Merriam-Webster Learner's Dictionary (2017) and Dictionary.com (2017). Based on their extensive knowledge and review of relevant international literature regarding effective schools and school leaders, Pashiardis & Johansson hypothesise that it may be

appropriate to consider 'successful' as being: 'a more inclusive term, a kind of an umbrella term, which includes effectiveness as well'. Consequently, they advise that 'successful' should not be used as a substitute for 'effective', suggesting that:

- **'Successful'** may be more about *processes* used in order to produce good results: '...putting the right systems and structures in place and improving on them, so that we can get the necessary results that are required...' (ibid: 3)

Whereas:

- **'Effective'** may be more to do with *products/outcomes* resulting from the successful deployment of these processes, including the efficient use of resources; in other words, the attainment of: '...good results, or the best possible results...' (ibid: 8), regarding student achievement, including examination results, and the realisation of planned targets, key objectives and outcomes.

Mestry (2016) appears to support this viewpoint to a certain extent. He refers to Peter Drucker's explanation (2001) that 'effectiveness' is 'a habit constructed of a complex of practices'. Moreover, he considers 'successful' to be very closely connected to 'effective' but goes on to define it as: '...the attainment of outcomes or accomplishing what was aimed for (e.g. academic success)' (2016: 109). When compared with Pashiardis & Johansson's definition of 'effective' as set out above, Mestry's definition of 'successful' rather exemplifies the potential for interchangeability between the two terms, particularly in his use of 'outcomes' and 'accomplishing', both of which imply a sense of finality or completion.

Further on in the same book, however, Hutton (2016) draws attention to some of the key attributes and characteristics that have been associated with

successful and effective leadership performance, citing Leithwood (2005), Luthans (2011), Davis *et al* (2005), Wallace Foundation (2013), and New Leaders for New Schools (2009). He suggests that a clear relationship may be perceived between the two terms and offers an explanation which more clearly reflects the definitions earlier posited by Pashiardis & Johansohn:

‘Successful leadership is about implementing the basic structures and systems which provide the platform on which effective leadership performance is achieved. In other words, the performance factors related to effective leadership represent the proceeding steps arising from the platform established by the successful principal. Thus, successful leadership precedes effective leadership, which is more about the direct actions that are taken to impact students’ achievement and overall performance.’ (ibid: 168-9)

In order to determine the meaning of success on which this study is based, I have firstly applied Hutton’s theory to the concept of ‘enactment’ rather than to that of ‘leadership’. Thus, *successful enactment* – or the application of the basic structures and systems the enactment process contains – becomes the platform on which the *effectiveness* of the EPQ learning programme must depend. Secondly, I have noted that, according to Hutton, success must necessarily precede effectiveness. Given that the purpose of my study is to investigate the processes, practices and the underlying perceptions and opinions of those involved in, or affected by, enactment of the EPQ learning programme – basically, to determine what factors are helping to make the programme work well – it would therefore appear more appropriate to refer to ‘successful learning programme enactment’ than to ‘effective enactment’ in the title of this thesis.

1.3 Contributors to the research

- 1.3.1 An overview of the participating centres

The four institutions participating in this research project comprise three case study centres (identified throughout this thesis as SFC1, SFC 2 and SFC3) and one pilot study centre. Although they display many differences as well as similarities when compared with one another, the one characteristic they undoubtedly hold in common is their ability to sustain 'successful' EPQ learning programme enactment, in line with Hutton's interpretation (see above). Despite all four having been subject to key periods of change and transformation, due to factors such as shifting internal staffing and financial priorities, fluctuating external relations with awarding bodies or the unpredictable impact of new government educational policy edicts, all have run the EPQ within their regular post-16 curriculum provision for a period of at least six years. In fact, two have provided the qualification annually since its pilot phase evaluation in 2007-08. All have interpreted and creatively translated the programme, together with its component parts and the roles played by its various contributors, in different ways. As a result, it has become – to varying degrees – more fully situated within, contributory to and representative of, the culture, values and priorities of each individual institution and its respective internal and external communities.

All four centres are mixed gender institutions whose primary purpose is to serve the needs of full-time students aged 16-19 years, although more than one also offers adult education learning opportunities and access to educational facilities for the wider community. One, part of a highly-selective secondary school, comprises a relatively small Sixth Form Learning Centre with an average student population of 250-300. The rest are large Sixth Form Colleges with average student populations ranging between 2,200 and 3,800 (data source: Gov.UK, 2015). Two centres are Academies – one having

converted to Academy status after participating in the fieldwork for this study – and all are located in either the south or east of England, or the Greater London area. The rationale for this sample selection is explained later in Chapter 3 (Section 3.7). Two centres are based in busy commercial/residential city environments, close to HE institutions, where the economy is generally prosperous and the aspiration of students to progress to Oxbridge and Russell Group institutions is high; nevertheless, one of these centres also caters for a significant number of students from socio-economically deprived areas (Ofsted, 2016). A third is based in an affluent, suburban district close to a large town boasting high levels of employment and career opportunities in sectors such as engineering; and the fourth, located in a Greater London suburb, serves a diverse population containing both high levels of affluence alongside severe deprivation and unemployment. According to their most recent Ofsted report (2014), this centre caters for a cohort within which the majority of students are from minority ethnic backgrounds, predominantly African, Indian and Chinese. Despite the varied character of their respective populations and geographic locations, however, all four centres achieve high rates of success with regard to student destinations. Between 89% and 93% of their annual student cohort remain in education or employment for at least two terms after key stage 5 (data source: Gov.UK, 2015; English average = 89%).

All four centres have set out clear written statements and strategic plans encapsulating their mission, purpose and underpinning values. Through comparative analysis of these documents, a number of key aspirational and attitudinal similarities emerge in respect of all the institutions, relating to the type of educational provision they aim to provide, the range of skills and attributes they intend that students may develop as a result of participation, and the underpinning values to which they adhere. The following provides a brief overview of these shared intentions.

a) Education provision should:

- offer quality, opportunity and achievement for all students
- make every effort to inspire, enrich and enhance student lives both during their time at the institution and into the future
- equip students with knowledge, skills and understanding necessary to meet the demands of a changing world and global economy
- be supported by a lively and caring college/school community which consistently celebrates the acquisition, development and application of knowledge and skills
- include a variety of stimulating learning experiences and a wide range of creative and demanding lesson activities that promote independent learning.

b) Through participation, students can leave the college/school as:

- independent, successful and confident learners who are self-motivated and able to take responsibility for their own progress
- resourceful, adaptable and well-equipped to undertake the challenges of further study, employment and adulthood
- committed lifelong learners and active citizens.

c) Key underpinning values to be promoted and sustained include:

- a passion for, and commitment to, learning and critical enquiry
- high expectations and aspirations regarding self and others
- realization of one's own potential and that of others
- mutual respect, involving freedom and trust, and the valuing of others
- social responsibility
- an inspiring, challenging and stimulating learning environment for all
- partnership-building, thereby contributing to the good of one's own institution and the wider community

- well-being, through development of a safe, supportive and nurturing community
- equality and diversity.

Finally, at the time of their last full Ofsted inspections (SFC1: 2016; SFC2: 2007; SFC3: 2006; pilot centre: 2014), three of the four centres were graded as ‘Outstanding’, with the fourth continuing to be graded as ‘Good’ following a more recent short inspection. However, it should be noted that, for two institutions, no further full inspection has taken place within the past ten years, in line with Ofsted’s current policy that any ‘Outstanding’ further education organization or school is normally exempt from routine inspection.

Detailed descriptions of each centre’s curriculum provision, including their approach to EPQ enactment, can be found in Chapter 3 (Sections 3.5 and 3.7).

- 1.3.2 Key groups of respondents to the research

Throughout this thesis, reference is made to four distinct groups of respondents who have engaged with the researcher in various ways and have provided valuable data during fieldwork activities. Three of the groups concern those individuals who are involved with the EPQ learning programme in their own institution, and possibly beyond it, either through direct involvement, for example in a teaching, supervisory or learning capacity, or in a less direct but nevertheless highly influential manner, such as those whose role is to do with centre management, coordination or policy development. These groups are identified as follows:

a) Programme Contributors – this category includes the lead EPQ Coordinator, EPQ supervisors and others contributing to the taught element of the programme or interacting directly with EPQ students, such as specialist subject teachers/tutors and Librarians or Learning Resource Centre managers. Some

'contributors' may also be 'stakeholders', in which case it is essential to be aware of and take into account their dual role.

b) Programme Participants – this category covers students who are either at the beginning of, currently undertaking or have already completed their EPQ studies and who have contributed in some way to the research fieldwork.

c) Programme Stakeholders – primarily, this category covers those who have something to gain from ensuring the success of the EPQ in their institution, and whose decisions may fundamentally impact on its interpretation, translation and enactment, but who are not necessarily involved directly in its delivery. In particular, 'stakeholders' include Principals and Deputy Principals, line managers for the lead EPQ Coordinators, and other members of the senior leadership team. Some 'stakeholders' may also be 'contributors' to the programme, in which case it is again essential to be aware of and to take into account their dual role. In addition, there is also a sub-group within this category: namely, external partners such as parents/guardians, employers and members of the wider community associated with the respective centres. Such partners may not necessarily have been approached to respond in person during fieldwork but their views have nevertheless been captured through other means.

The fourth group represents those individuals who are neither staff nor students at any of the three case study centres but who have nevertheless made a valuable direct contribution to my research. This group I have termed:

d) Programme Shapers– this category includes those individuals who have been approached for background information, perceptions and opinions regarding aspects of the qualification's origins and the intentions of its originators, its purpose and benefits, and how its enactment may have changed over time. Clearly, some of this group may also be contributors and/or stakeholders but are not named as such as they were not involved in

the main body of my research, i.e. the centre-based fieldwork. Rather, they include national policy makers and qualification development advisors, awarding body and university representatives, together with teachers and librarians from other institutions who have been involved with the EPQ.

1.4 Outline of thesis structure

In the present chapter, I have set out the purpose of this research and introduced the key elements, contributors and issues to be investigated. Chapter 2 takes two of the 'core components' – the EPQ and the enactment process – and aims to more fully understand some of the factors influencing their emergence and development over time through review of relevant literature sources including policy reports and awarding body publications. With regard to the enactment process, two aspects will be considered in greater depth: firstly, the types of 'contextual dimensions' of particular relevance to the research findings, and, secondly, the varying roles and potential impact of learning programme enactment 'actors'.

Chapter 3 discusses the research methodology selected for this study and sets out the rationale behind my decision to adopt a primarily qualitative, multiple case study approach and to work within the parameters of constructivist grounded theory. It also describes the key components of my research design, including my two-fold approach to piloting, background curriculum details regarding the research sample, and the methods chosen for gathering, coding and analysing data. Ethical considerations, together with reference to ways in which validity and reliability have been addressed, are also presented.

In Chapter 4, focused code findings from the research are presented and discussed, alongside a detailed explanation of the four conceptual themes and sixteen focused codes that together form the analytical framework developed

during data coding and analysis (Appendix C). Findings for each of the three case study centres are then presented in Chapter 5, and noticeable similarities and differences of practice observed within and across the three centres are highlighted. Finally, Chapter 6 concludes the thesis by considering the potential contribution of new knowledge made to the field, and summarising perceived implications arising from the research findings. In addition, the impact that undertaking the research process has had on the researcher is reflected upon. Lastly, suggestions are made regarding possible areas for future research and the potential benefits of the findings to stakeholders.

Chapter 2: Literature Review

2.1 Introduction

The purpose of this chapter is to explore in greater depth some of the distinguishing characteristics of two core components introduced in Chapter 1 (Section 1.2): firstly, the Extended Project Qualification (EPQ) and, secondly, the process of 'enactment'. As previously explained, the EPQ forms the overarching case for investigation in this study, whereas the enactment process, adapted from Ball *et al*'s (2012) investigation of policy in schools, forms the conceptual framework underpinning this case study investigation, to be further discussed in Chapter 3 (Section 3.4). In addition, through review of a range of primary and secondary sources of data, including relevant examples of theoretical literature, evaluative materials and educational policy, it is intended that this chapter should provide:

- an historical insight into the national educational and policy context surrounding the emergence of the EPQ, including some of the influencing factors leading up to its introduction
- further clarification on the qualification's intended purpose, and consideration of possible factors affecting its development and status over time
- evidence of how the EPQ itself is proving to be an influential feature in relation to post-16 education and qualification reform, particularly in recent years
- examples of educational practice to support the perceived value and origins of the enactment process of development, interpretation and translation, as initially portrayed by Ball *et al* (2012)

- further definition of what and who is involved in the concepts of ‘contextual dimensions’ and learning programme ‘actors/enactors’ (or policy ‘actors/enactors’), particularly with regard to those likely to be encountered in and impacting upon the EPQ enactment process.

My rationale for deciding to focus my literature review on these two major topics is that their fundamental importance within this case study warrants a firm grounding of background knowledge about each of them, and the issues surrounding them, in order to avoid as far as possible misinterpreting the meaning and significance of data or making unfounded assumptions, attributions or conclusions that might jeopardise the validity of findings presented later in Chapter 4. Moreover, the research holds particular relevance in that it has the capacity to contribute to the achievement of objectives set out in Research Questions 2 and 3:

Research Question 2: *What was the EPQ’s intended purpose and how, if at all, has this altered over time?*

Research Question 3: *How has planned change (namely, the introduction of the EPQ) led to unplanned change over time?*

2.2 Locating the EPQ

-2.2.1 Origins of the EPQ

As previously observed in Chapter 1, examples of literature specifically concerning the EPQ are somewhat limited. Moreover, what is available tends to focus more on student learning approaches and outcomes than on the qualification’s origins or aspects of its enactment. Therefore, in order to establish a rationale for the EPQ’s emergence, and to seek to identify some of the factors most likely to have inspired or foreshadowed its original purpose and design, as set out in the Tomlinson Report on 14-19 qualifications (DfES,

2004), it is necessary to start by investigating relevant examples of policy, theory and practice relating to post-16 education and qualification reform from the years leading up to the EPQ's inception.

In particular, evidence relating to five distinct types of contextual source has been deliberated upon, in order that the underlying objective of my second research question (above), may be adequately addressed:

- Firstly, background information regarding aspects of post-16 educational reform characterising the priorities of John Major's Conservative government (1990, re-elected 1992-1997) which, in turn, built upon the changes introduced by previous Tory governments under Margaret Thatcher (1979-1990) – an understanding of educational policy developments during the final years of the 20th century is important, not least because many of the educational changes implemented under Tory auspices were later to be continued or extended by New Labour (Abbott *et al*, 2013: 114).
- Secondly, background information on the political philosophies and relevant educational agendas of the New Labour government (1997-2010), in power at the time of Tomlinson (2004) – to shed light on why the Report was commissioned, the nature of its Working Group's recommendations, and why they were received in the way they were.
- Thirdly, key government policy documents focusing on post-16 education and qualification reform during these periods (such as DES/ED/WO, 1991; Beaumont, 1995; Capey, 1996; DfEE, 1997) and their relationship to Tomlinson – for example, to determine the extent to which previous policy documents, especially Dearing's *Review of Qualifications for 16-19 Year Olds* (1996), may have paved the way for Tomlinson's *Final Report of the Working Group on 14-19 Reform* (2004), which included the introduction of the EPQ.

- Fourthly, examples of literature from educational theorists (for example: Bloomer, 1997; Richardson *et al*, 1993; Young & Spours, in Richardson *et al.*, 1995; Gleeson, in Avis *et al*, 1996; Higham *et al*, 1996) keen to advance the debate regarding ways in which post-16 education would need to change in order to meet the demands of the new millennium – to ascertain whether any of their ideas may have inspired development of the EPQ.
- Fifthly, details of post-16 learning programmes and qualifications such as the International and Welsh Baccalaureates, BTECs and GNVQs – to establish: a) ways in which they may have foreshadowed and thus influenced EPQ development; and b) the extent to which the EPQ may be seen to have filled a gap in existing qualification provision.

The following sections track some of the underlying political contexts and educational agendas relating to the final years of the Conservative government and the advent of New Labour from 1997, with particular focus given to the Dearing and Tomlinson Reviews and their respective proposals for post-compulsory curriculum and qualifications reform. Discussion will be specifically linked to the emergence and development of the EPQ, as will a short review of key qualifications and study programmes existing at the time of its inception.

2.2.1.1 Major's Conservative government (1990-1997)

The 1990s began with the departure from office of Margaret Thatcher after eleven years as Conservative Prime Minister (1979-90). Her replacement, John Major, inherited a government determined to raise standards in education in order to improve the economic standing of the country (Abbott *et al*, 2013). This they aimed to achieve through the implementation of policies conveyed in the relatively recent Education Reform Act, or ERA (DES, 1988) which had emphasised competition and privatisation, including freedom for colleges and

schools to manage their own budgets, alongside the implementation of the new National Curriculum in schools. Following on from the sentiments of the ERA came a White Paper (DES/ED/WO, 1991) on education and training for the 21st century which, whilst continuing to emphasise freedom and choice for the FE sector, also established more formally the existing 'dual-track' system of academic and vocational qualifications, based on A levels, GNVQs and NVQs. In addition, there was the development of: 'external and over-arching diplomas to confer 'parity of esteem' between the separate tracks' (Spours, in Richardson *et al*, 1993: 147). This strategic approach, according to Spours, resulted in a more divided and less flexible qualifications system in England; ultimately, it led to intensified calls for reform of the system (Hodgson & Spours, 1999: 110).

In 1992, arising from the 1991 White Paper, The Further and Higher Education Act (DfE) was passed, heralding the 'incorporation' or independence of FE colleges. This move to provide opportunities for delegation of funding and self-management in terms of 'staffing, marketing, course planning and provision' (Huddleston & Unwin, 2013: 8), was intended to encourage college independence and a reduction in the power of local authorities over them. However, although it may be argued that this attempt by government to transform the FE sector into autonomous 'businesses' proved to be a long-term, mostly positive development, the characteristics and benefits of which are still abundantly evident in the case study colleges involved in this study, the more immediate consequences of incorporation were not all so constructive. For example, competition between institutions increased, and colleges coping with the unfamiliar pressures of regulation found that the strict funding regimes imposed on them by the FE Funding Council tended to determine the types of courses and qualifications they could offer (ibid: 9). Nevertheless, as Abbott *et al* have noted (2013: 119), an entrepreneurial, collaborative and creative spirit gradually prevailed in many institutions.

The continuing undercurrent of concern about the quality and fitness for purpose of the A level/GNVQ/NVQ qualifications system, eventually led the government to commission a series of important reviews, not long before their replacement in 1997 by New Labour. Firstly, the Beaumont Review of NVQs/SVQs (1995); then, the Capey Review (1996) regarding GNVQ assessment; and finally, the Dearing *Review of Qualifications for 16-19 Year Olds* (1996), which holds particular implications for the purposes of this thesis in that it can be argued to contain many features that presage New Labour's educational priorities and the future Tomlinson Report (DfES, 2004). Perhaps advantageously, in light of the academic/vocational complexities of the system to be reviewed, Dearing was commissioned by both the Departments for Education *and* Employment, following their merger into the DfEE (1995), to: 'consider and advise ... on ways to strengthen, consolidate and improve the framework of 16-19 qualifications' (1996: 1). The Review was designed to address six key objectives, as summarised in the final report (1996: 2), which not only reflect government priorities at the time but also, with regard to the emphasis placed on diversity, Dearing's own assumptions and values (Young, 1997: 32):

- 'Provide diversity of opportunity and informed choice for learners;
- Motivate and recognise achievement by people of all ability levels;
- Ensure standards are rigorous, challenge expectations, and encourage excellence;
- Increase the coherence of the national qualifications framework, reduce its complexity, and make it more easily understandable by everyone;
- Contribute to the success of young people in the world of work, and to their personal development and fulfilment;
- Support the achievements of the new National Targets for Education and Training with their aim of providing a national workforce able to

meet the international competitive challenge through high levels of skill and adaptability to change.'

From the perspective of this study on the EPQ, its origins and development over the past fifteen years, Dearing presents a number of interesting observations and recommendations that may well have provided inspiration for some of Tomlinson's later proposals, including the EPQ. They reflect what Cummings (2000) suggests is indicative of Dearing's desire to: 'distance himself from the 'top down' impositions of the early 1990s' (ibid: 366), based as they are on a 'dynamic social' process of widespread consultation rather than solely centred on government policy – an approach also reminiscent of the type of consultation process later adopted by Tomlinson. For example, having noted the skills needs of employers (as recently articulated in a CBI survey) to include interpersonal skills, presentation skills, problem-solving and 'self-management of learning programmes' (1996: 55), Dearing recommends that:

'All learners, including A level students, should be given opportunities by institutions to practise making oral presentations to peer groups, to engage in discussion on their presentations, and to tackle projects through group work to develop their experience of team working.'
(ibid: 56)

With the exception of the blanket requirement for group working, this description mirrors exactly what happens in an EPQ learning programme, as has been noted in my participant case study centres (Section 3.7.2). Dearing's report goes on to draw attention to the importance of ensuring balance between specialisation, depth and breadth of study with regard to post-16 education, commenting that General Studies A level was an obvious way of achieving this goal, given that in 1996 it was: 'a widely-used means of broadening the curriculum, and is the second most popular A level in terms of

entries' (ibid: 62). In light of the EPQ's own capacity to enrich a student's study programme, and the recent developments regarding its possible impact on the popularity of General Studies (see Section 2.2.2.3), Dearing's observations are worthy of note. So is his stated rationale for the importance of preserving breadth of study; namely, he viewed it as a means of preparing young people for working in the 21st century when 'the need to change direction in careers' will almost certainly be much greater than it was in the 1990s (ibid: 63).

Another implicit 'precursor' of Tomlinson's EPQ appears in Dearing's recommendations regarding the need to develop alternative approaches to Special Papers (S levels) for more able young people, given the view of many HE institutions that they lacked credit. A possible way forward, in his opinion, might be the introduction of:

'...externally marked extended assignments in which students research and explain a topic or issue in depth.' (ibid: 124)

Elsewhere, he promotes the idea, raised during consultation, that students' range of studies might also be extended by including a critical examination or study of the forms of knowledge, similar to that already delivered as part of the International Baccalaureate. This could: 'encourage and enable students to:

- Reflect on and question the bases of knowledge and experience.
- Be aware of subjective and ideological biases.
- Develop structured and logical thinking based on critical examination of evidence and expressed in rational arguments' (ibid: 122).

Skills to be assessed might include:

- **Critical thought:** 'quality of analysis; ability to justify argument and awareness of other points of view; awareness of the strengths and limitations of different ways of knowing; personal thought and originality.'

- **Clarity:** ‘ability to organise and structure an essay; effective use of language; ability to evaluate evidence; conceptual fluency (a skill much valued by employers as well as academics).’ (ibid: 123)

Yet again, Dearing’s vision of the skills and knowledge to be gained from such a form of curriculum enrichment appears to set a precedent for the learning processes and outcomes, and assessment objectives (Section 1.2.1) available to students through participation in the future EPQ.

Unfortunately for Dearing, many of his proposals were largely ignored (Abbott *et al*: 121) although the merging of the Schools Curriculum and Assessment Authority (SCAA) and the National Council for Vocational Qualifications (NCVQ) did take place, as did the reduction in number of awarding bodies due to the merger of boards responsible for academic or vocational qualifications:

‘...but academic and vocational education remained separate and A level examinations were not altered.’ (ibid: 121)

Dearing’s recommendations regarding the development of a common framework for NVQ, GNVQ, GCSE and A level, and the creation of applied A levels, Advanced Certificates and Diplomas were equally disregarded at the time (ibid: 121). Others, such as recommended changes to A levels and GNVQs, were later deferred due to the defeat of the Conservative government by Labour in 1997, compounded by the fact that, according to the new Labour government, teachers, lecturers, employers and awarding bodies had all expressed concern that: ‘more time was needed to pilot and evaluate the changes and prepare for their implementation’ (DfEE, 1997: 2). Mixed responses were received from some educational theorists, as for example, in the case of Evans (1998: 16) who described the Dearing Review as representative of: ‘an approach which adds bits and endlessly reorganises’; and Ecclestone (1998: 96), who observed that it was symbolic of many other: ‘bland, technical reports emanating from the complex research policy

processes around GNVQs and NVQs'. Nevertheless, it still received a sizeable consensus of professional support and enthusiasm (Higham *et al*, 1996: 155). Overall, as Hodgson & Spours note (1999: 110; see also: Abbott *et al*, 2013: 120; Higham *et al*: 154), Dearing was constrained by the requirements of his given brief, not only to maintain the rigour of so-called 'gold standard' A levels – despite the fact that: 'the standing of A level has led to their expansion beyond the purposes for which they were created' (Dearing, 1996: 11) – but also to continue building on current developments in GNVQs. He was simultaneously being asked to consolidate *and* reform (Young, 1997: 27). The task was further complicated by the fact that the number and range of available qualifications at the time was vast – 'at least 16,000' – and yet, amongst employers, only the A level was seen as 'a common currency...' (1996: 11). It seemed unlikely from the outset, therefore, that the kind of radical and wide-ranging reforms of post-compulsory education as desired by many since the early 1990s would ever materialise as a direct result of the Dearing Review, even though its proposals clearly went on to influence professional debate and were broadly welcomed across the political spectrum (Cummings, 2000).

2.2.1.2 New Labour: continuity and change (1997 onwards)

Prior to its return to power in 1997, and just one week before the publication of Dearing, New Labour published its own proposals for the reform of the 14-19 curriculum (Labour Party [Great Britain], 1996). *Aiming Higher* undoubtedly indicated that the Party had allied itself to those in favour of 'a more flexible, inclusive and unified system' (Hodgson & Spours, 1999: 113) of the type that Dearing had attempted to promote. In keeping with the sentiments of his Review, they endorsed the introduction of a single credit framework for all 16-19 qualifications, broader A level programmes, improved vocational programmes, and promised that: 'all advanced level education should be

recognized by the award of an Advanced Diploma at Level 3' (ibid: 113). In so doing, the influence may be detected of Finegold *et al's* (1990) proposals for a British 'Baccalaureat' which had already helped to steer previous Labour policy thinking (Richardson *et al*, 1993: 16), together with Young & Leney's recommendations on extending modularisation and creating a whole curriculum framework (in Richardson *et al*, 1995: 24). However, once in power, New Labour exercised a more cautious approach to reform than had perhaps been expected – as Hodgson & Spours posit (1999: 114), this may in part have been due to the possibility that development of a unified curriculum could be interpreted as a long-term threat to A levels, which in turn might be detrimental to the Party so soon after assuming office.

Consequently, in their paper entitled *Qualifying for Success* (DfEE, 1997), the newly-elected government sought to consult on the aims of their manifesto commitment:

'...to broaden A levels and upgrade vocational qualifications, underpinning them with rigorous standards and Key Skills.' (1997: 3)

At the same time, they made it clear that their desire would be to build on – but go beyond – Dearing's proposed reforms (having made early attempts to implement them but with limited success, leading to their deferral). For example as their preferred means of encouraging breadth, the document specifically draws attention to Dearing's recommendations for:

- 'a reformulated and more accessible AS level qualification
- reduced units in the Advanced GNVQ
- more consistent and manageable modular A levels
- a better balance of internal and external assessment.' (ibid: 12)

Similarly, the new government continued to show support for both National Certificates and a National Advanced Diploma which they proposed would

attract UCAS points, but pointed out that concern had already been voiced that 'the specific proposals could be both divisive and complex' (ibid: 23). As a realistic alternative for most learners, therefore, they proposed a single, differentiated certificate: '...which would motivate them towards higher levels of achievement' (ibid: 23). As to timing, the government expressed optimism that qualifications reform should be capable of implementation by 1999 with an overarching certificate in place by 2001.

As may be ascertained from the summary above, *Qualifying for Success* is a prime example of why the New Labour government swiftly became associated with both continuity *and* change in many areas of its educational policy agenda (Jephcote & Huddleston, in Phillips & Furlong, 2001: 68). The Party, led by Tony Blair since 1994, had become one leaning more to the centre than to the traditional left of British politics and was intent on producing policies aimed at creating a 'world-class education and training system' fit for the 21st century, which would be a market-led system focused on social justice, economic freedom and prosperity (Abbott *et al*, 2013: 131). Improving educational standards and providing better opportunities for the less well-off were central tenets of its overall mission, as reflected in Blair's avowal that his priorities for the new administration would be: "education, education, education". However, one characteristic that soon began to dominate New Labour policy was the tendency to promote strong central control, although according to Hodgson & Spours (1999: 2), this was less noticeable with regard to post-compulsory education, perhaps because the issues to be addressed in compulsory education were more pressing at the time. In addition, their actions portrayed a constant enthusiasm for influencing not only what was taught but also how it was to be taught, and for promoting the notion of accountability through rigorous inspection, target setting and assessment (Phillips, in Phillips & Furlong, 2001: 24). In particular, throughout their time in office (to 2010) successive Labour governments were renowned for producing

an enormous amount of legislative bills, consultations and policy papers. Early on in the run-up to Tomlinson, these included two important White Papers: *Excellence in Schools* (1997) and *Learning to Succeed* (1999), the latter setting out a new framework for post-16 learning, and heralding a series of actions begun in September 2000 which aimed to increase student flexibility and choice by radical reform of A levels. These wide-ranging reforms, which came to be known as Curriculum 2000, included the introduction of modular AS and A2 examinations, along with regular modular assessments and a suite of vocational A levels known as Advanced Vocational Certificate of Education (AVCEs). AVCEs were intended to replace GNVQ Advanced qualifications and were eventually re-specified as Applied GCEs (2005): 'a qualification more akin to its A-level cousin' (Huddleston & Unwin, 2013: 58). These changes were aimed at incentivising students by offering them a greater coverage of learning through varied discipline choices, and at ensuring that varying indicators of depth of study would be used in order to provide HE institutions with more accurate information on students' knowledge and skills. Overall, A levels would be promoted as: 'a vital general qualification, not only as an entry to University, but also as recognition of the achievement of young people aged 16-19' (Kotecha, 2010: 197).

2.2.1.3 Tomlinson: 14-19 curriculum and qualifications reform

Following on from Curriculum 2000, a most significant Green Paper entitled *14-19: Extending Opportunities, Raising Standards* (2002) was issued which sought to both reinforce and progress the steps already taken by New Labour, notably with regard to widening vocational and work-related learning opportunities for all young people. Of direct relevance to the EPQ, the subject of this study, and clearly foreshadowing Tomlinson, the Paper included

proposals for changing post-16 education to take account of the following three key objectives (ibid: 37-44):

- Introduction of a Matriculation Diploma at three levels of achievement (Intermediate, Advanced and Higher), or alternatively, provision of a Certificate of Achievement which would be undifferentiated by level; both the Diploma or Certificate would recognise and consolidate all a young person's learning and attainment in terms of their qualifications, key skills and wider activities;
- Acknowledgement of the particular importance of attainment in key skills (literacy, numeracy and ICT) and development of wider skills necessary for employment;
- Recognition of the importance of participation in enrichment activities outside the formal curriculum for making a critical contribution to personal development and the acquisition of skills; specifically, these 'wider activities' would encapsulate active citizenship, including volunteering, engagement in wider interests and work-related learning, including work experience.

Ultimately, the Department for Education and Skills published its response to the Green Paper in 2003, setting out short- and medium-term changes to the curriculum for 14-19 year olds that would: 'combine breadth of study with more flexibility for schools and colleges to tailor programmes to individual aspirations, needs and aptitudes' (DfES, October 2004: 8). In particular, as later explained in the Interim Report (DfES, 2004b) of Sir Mike Tomlinson's Working Group on 14-19 curriculum and qualifications reform, the government had recognised that a longer-term process of reform would be necessary in order to deal with historical weaknesses inherent in the structure of 14-19 learning in England. As a result, the Working Group was commissioned in January 2003 to address these longer-term issues, with Terms of Reference founded upon

the three 'overlapping strategic directions for change' previously identified in *Extending Opportunities*. As these stated, the government looked forward to progress being made over time towards:

- 'strengthened structure and content of full-time vocational programmes, and to offer greater coherence in learning programmes for all young people throughout their 14-19 education;
- assessment arrangements for 14-19 year olds that are appropriate to different types of courses and styles of teaching and learning, with the overall amount of assessment manageable for learners and teachers alike; and
- a unified framework of qualifications that stretches the performance of learners, motivates progression, and recognises different levels of achievement.' (DfES, 2004: Appendix E)

To achieve their overarching goals, the Group was asked to make recommendations on a wide range of related issues, including how programmes might best be developed to achieve 'broad public recognition and currency' with employers and Higher Education, and how employers might more strongly contribute to the design and delivery of the proposed framework. Moreover, and of particular relevance to the EPQ's development, they were also asked to suggest ways in which programmes might promote:

'...the acquisition of essential practical skills for life...' and encourage
'...the development of analytical, problem solving and thinking skills
and the confidence and ability to present and argue conclusions.'

(ibid: 90)

With a further requirement that:

‘...additional breadth and complimentary study should be included within the post-16 element of 14-19 programmes, particularly for the most able.’ (ibid)

Where the terms of reference discussed assessment arrangements, they stipulated that these should be fit for purpose, manageable for institutions and their learners, and motivating. In addition, the Group was reminded to take note of certain key priorities (ibid: 92), including the need to enhance diversity, breadth of provision, local innovation and choice for learners. Undoubtedly, the seeds of the eventual EPQ may clearly be traced throughout the Review’s intended aims.

- **The Interim Report**

By the time their Interim Report was published in February 2004, the Working Group had begun to develop a series of detailed proposals characterised by ***‘inclusiveness, challenge, quality and choice’*** (ibid: 8). Perhaps it would not be inappropriate to add ‘progression’ to this list of underpinning aspirations, given that the 14-19 proposals were being developed at the same time as, and in the knowledge that, equally pressing reforms were being devised to improve the adult qualifications and training framework. As the Qualifications and Curriculum Authority (QCA) and Learning and Skills Council (LSC) jointly stated, ‘Not only do the proposals complement each other, they add up to a powerful 14-19 reform agenda’ (QCA, 2004: 3). The Interim Report shows that work was already well under way regarding development of a common ‘template’ for achieving balanced 14-19 programmes and Diplomas (DfES, 2004: 19) of two possible types: *open* (in which learners could opt for a pick and mix of main learning) and *specialised* (which would focus around a specific ‘line of learning’). In all cases, the template would consist of two main strands:

a) a core of generic components – including mathematical, communication and ICT skills, an extended project, wider activities and personal planning, review and guidance; and

b) main learning – covering specific academic, theoretical and/or vocational knowledge, learning and skills.

At this stage, it is interesting to note how the extended project is defined as being a ‘personal challenge’ that would be destined to play a central role in the proposed system of programmes and diplomas: ‘as it would increase significantly the challenge and variety of 14-19 learning’ (ibid: 21/59). At Advanced Diploma level, much store is set on it being a means of developing and demonstrating critical, analytical, presentation, communication and problem-solving skills, all of which would be of benefit to future study in HE settings as well as in ‘skilled craft and supervisory employment’ – thereby becoming a valuable tool to support lifelong learning. Moreover, the notion of including a presentation of project work to peers and teachers has already emerged (ibid: 59). However, two proposals are somewhat less evident in the EPQ’s current enactment than at first suggested: firstly, that it should be both internally and externally assessed, and secondly, that credit should be given for the final piece of work as well as the process whereby it had been achieved.

Following the Interim Report, a substantial consultation process was conducted within which the majority of respondents welcomed the Working Group’s proposals thus far. With regard to the extended project, Annex B of the Final Report notes that there was strong support from a broad range of respondents, including young people: ‘...as it would develop skills that higher education in particular sought and [*would help to*] avoid the repetition of coursework’ (DfES, 2004: 9). Even so, some concern was voiced as to how to moderate such a varied range of projects to ensure they were comparable, and

how to ensure that management, supervision and assessment procedures did not become overly resource-intensive for teachers.

- **The Final Report**

On publication of the Final Report in October 2004, Tomlinson summed up the Working Group's intentions in his covering letter to the then Secretary of State, Charles Clarke (shortly to be replaced by Ruth Kelly). From the outset, their vision had been to bring back a passion for learning through enabling all learners to achieve as highly as possible, and through developing the means whereby their achievements would be recognised. Having considered the current system (through consultation and collection of a number of inspirational case studies), the Group noted it possessed strengths as well as weaknesses. Consequently, they had aimed to build on good practice already existing in schools and colleges and to retain the best features of existing qualifications, especially the 'well-established GCSE and A level route'. Nevertheless, as the main proposal of their Report would be the development of a unified Diploma system for all 14-19 year olds, designed to replace all other qualifications currently available to them, it was important to recognise that:

'While they would not be available as separate qualifications, GCSEs and A levels and good vocational qualifications would become 'components', which form the building blocks of the new system.'

Of particular note was the Group's warning that, should their proposals be accepted by the government:

'Change should be a managed evolution and not a revolution.' (ibid.)

The Group recognised that support would be needed from all stakeholders, including parents and the young people themselves, to achieve change on such a level – and that the teachers, lecturers and trainers involved in implementing

such a radical transformation would themselves require ongoing support and training. In summary, as described in the Final Report, (ibid: 5) the Working Group's proposals centred on two linked developments:

- A common format for all 14-19 learning programmes - combining knowledge and skills necessary for all learners to participate fully in adult life, with each individual having the freedom to choose disciplines compatible with their interest, aptitudes and ambitions; and
- A unified framework of diplomas – these would offer the learner 'clear and transparent pathways' through from 14-19 with the promise of enabling progression into further/higher learning, employment and training; they would be designed to: 'provide a ready-made, easy to understand guarantee of the level and breadth of attainment achieved by each young person' (ibid: 5).

Thus, all learning programmes and Diplomas would comprise 'core' and 'main' learning components, as proposed in the Interim Report, with a major feature of core learning being the extended project – the means whereby creativity would be fostered in the diploma framework (ibid: 18). In effect, all learners' achievements would be certified by a Diploma at one of four levels (Advanced L3; Intermediate L2; Foundation L1; Entry Level) and would be named according to the 'line/s of learning' to which they related. One 'line' – the *open* programme – would allow learners to choose a mix of subjects for themselves, including vocational options from different lines; the others would be more *specialised* pathways, covering 'broad academic and vocational domains' (ibid: 6). The Working Group envisaged the 14-19 framework might contain up to 20 named Diploma lines, covering both academic and vocational areas, and that within each line, the content would be prescribed according to its specialism which, in turn, would determine the name of the respective Diploma.

With regard to the extended project, much of the detail outlined in the Interim Report was confirmed. At higher levels it would be: 'a single piece of work which requires a high degree of planning, preparation, research and autonomous working' (ibid: 32). At lower levels of the framework, it was envisaged that it would probably take the form of a personal challenge, such as a series of linked tasks that would be agreed with a tutor. The challenge would need to be designed in such a way that it would demonstrate the range of skills appropriate to the level at which the learner is working. One of the main advantages of the project would be its capacity to reduce the assessment burden by assessing through a single task a range of skills, including the application of functional skills, currently tested in numerous items of coursework. Other benefits would be the opportunities it could provide for more able learners to develop and demonstrate higher level skills and research processes, and for motivating those learners difficult to engage through pursuit of personal interests and aspirations. It could also:

'...encourage cross-boundary and/or in-depth learning and wider application of knowledge developed through main learning ... [*thus providing*] a means of synthesising main learning, while integrating it with the core.' (ibid: 33)

Finally, the Report stressed the opportunity provided by the extended project for young people to access a 'personalised space' in which to research subjects of special interest to them or to supplement and extend the content of main learning in specialised programmes. With regard to assessment procedures, however, Recommendation 22 implies a shift away from the Interim Report's recommendation that projects should be both internally *and* externally assessed, whilst continuing to emphasise that equal value be placed on both process and outcome:

‘Assessment of the extended project should be in-course, carried out by teaching staff or suitably qualified people in other organisations, and should assess the quality of the processes as well as the final piece of work.’ (ibid: 87)

The Working Group again expressed support for the notion that assessment should take place on an ongoing basis over the project’s duration in order to ensure its manageability, and that it should include an oral presentation or viva by the learner. In addition, they promoted the idea that ‘supervision, assessment and mentoring’ could be undertaken by representatives from outside organisations such as businesses or HEIs (ibid: 67). Clearly, there are implications regarding training – needs, provision and funding – bound up in many of these recommendations.

The Working Group envisaged that implementation of their proposed reforms would take at least ten years, with: ‘visible improvements leading to longer-term reform becoming evident in the first five years’ (ibid: 52). They identified several key strands of the implementation, including quality assurance measures, whole Diploma testing and evaluation, workforce development and ensuring infrastructure arrangements are fit for purpose. In addition, they estimated that criteria for the extended project would be developed and available for use by 2008 and that curriculum, assessment and infrastructure arrangements would have been tested and trialled by 2014, with much of the new diploma system ready for national roll-out in 2014-15.

- **Reflections on Tomlinson**

When comparing the aims, objectives and Terms of Reference articulated in the Tomlinson Review with those of the earlier Dearing Review, a number of noteworthy similarities and differences emerge which serve to show how education policy had evolved over time under New Labour and yet had stayed

much the same in certain respects since the Tory government had lost power in 1997. For example:

- Whereas Dearing had been asked to *improve* the framework of 16-19 qualifications, Tomlinson's remit was to make recommendations on the development and implementation of a '*unified* framework of qualifications' for 14-19 year olds, reflecting New Labour's aims to improve coherence and continuity, the latter by reducing the impact of the 'learning divide' at age 16.
- Both were asked to take into account academic and vocational routes. However, for Dearing, the main focus was placed on *maintaining* the rigour of A levels and on *continuing to build on* the current development of GNVQs and NVQs (DfEE, 1996: 1). On the other hand, Tomlinson was requested to *improve the structure* of programmes, but 'particularly predominantly vocational programmes' (another key priority for New Labour) in order to offer students routes ensuring 'clear progress and achievement'.
- Dearing was asked to bear in mind the need to 'Increase participation and achievement in education and training and minimise wastage'; a key consideration for Tomlinson was similar, but subtly different: 'To increase post-16 participation and attainment, and to narrow the attainment gap'.
- Both had to consider the need to prepare young people for work *and* higher education, but Tomlinson was specifically requested to make recommendations on how his proposed reformed qualifications: '...can be more readily understood as part of a clear framework from Key Stage 4 to skilled employment or HE options'; he was also tasked with preparing a unified framework: '...capable of commanding a wide range of support among key stakeholders, in particular higher education and employers' (DfES, 2004: 77).

- Other significant similarities shared by both Reviews (here illustrated by text from Dearing (1996:1) relate to the following requirements: a) to achieve greater coherence and breadth of study in post-16 learning; b) to consider why so many students were dropping out of courses and ways in which this might be reduced through encouraging them to ‘mix and match qualifications to suit their needs and abilities’; and c) to recommend ways of motivating, stretching and challenging the most able students – but note the more equitably phrased terms for Tomlinson who was asked to provide challenge for *all learners, including* the most able. In both cases, however, it should be noted that Dearing and Tomlinson deliberately sought to address the needs of all learners in their Reports.
- Lastly, Dearing was asked to consider whether core skills, already an essential part of GNVQs, should be encouraged as part of the programme of study for more 16-19 year olds. Eight years on, though differently phrased, this was still required of Tomlinson who was asked to make recommendations on how: ‘14-19 programmes generally can help promote the acquisition of essential, practical skills for life, and how also they might encourage the development of analytical, problem solving and thinking skills and the confidence and ability to present and argue conclusions’ (DfES, 2004: 76).

The fate of the Tomlinson Review could be said to be eerily reminiscent of that which had befallen Dearing’s recommendations in that it, too, was affected by reluctance on the part of politicians to be seen to endorse a move that might undermine the existing ‘gold standard’ A level system, this time linked to the proposed replacement of GCSEs. Initially, the Report’s overall recommendations received strong support from across the political divisions, private and state education sectors, business, trade unions and the media (Huddleston & Unwin, 2013: 57; Abbott *et al*, 2013), despite the ambitious

levels of radical reform they promised to introduce into 14-19 education. As Tomlinson later reflected in an interview:

“We almost had consensus, not that every detail was right, but [*that*] the blueprint was right.” (Bangs *et al*, 2011: 145)

His ideas had also benefited at the outset from the support of both Charles Clarke and the then Minister, David Miliband, who was sympathetic to the possibility of the Diploma, having previously worked with Finegold *et al* on the design for a British Baccalaureat (1990). It may be true that some of Tomlinson’s proposals received adverse criticism, such as the sheer complexity of the suggested Diploma framework and that, also noted by Huddleston & Unwin (2013: 57), concern was voiced regarding the advisability of attempting to unify academic and vocational education when this could cause the latter to be further devalued. Similarly, the business perspective included some who felt the Report was distracting attention away from the need to improve standards in basic skills, as opposed to the Federation for Small Businesses who were strongly in support of it. Nevertheless, as voiced by an FE Principal at the time, the general feeling was mainly one of pragmatism:

‘Mike Tomlinson’s proposed reforms basically pose a key question to our national education service: either we maintain a system that is built around the needs of a minority of learners (i.e. the most able 40 per cent), or we redesign our system around the demands of an inclusive society and economy.’ (Martin Tolhurst, in Stanistreet, 2004: 8)

Therefore, Tony Blair’s eventual rejection of the main thrust of Tomlinson – the introduction of a new general Diploma for all school-leavers in place of the existing system of 14-19 qualifications – came as a tremendous disappointment to many, and not least to its originator. A number of issues contributed to this unexpected turn of events (see Bangs *et al*: 146-7) but two main reasons stand out. Firstly, Blair decided that what was already being

construed by some as the eventual abandonment of A levels, was ‘a bridge too far’ for the Labour government as it embarked on the 2005 general election to fight for its third term in office. According to Tomlinson:

“However rational, however well worked, and however carefully constructed the 14-19 Report may have been, the prime minister was, in a politically charged arena, pursuing his own rationale.” (ibid.)

Secondly, Blair’s reluctance was compounded by the response of Clarke’s replacement as Education Secretary, Ruth Kelly, who commented that, regardless of issues around its effect on A levels, the new Diploma lacked a “...strong and easily understood thread of continuity with the past” (interviewed in Abbott *et al*, 2013: 161). She went on to observe that, although Diplomas had the potential to become the ‘qualification of choice’ in the long term, it would be hard to convince employers and universities to give them the level of credibility necessary to ‘get them off the ground’ as they would struggle to recognise and relate to the new qualifications. Ultimately, for Bangs *et al*, the fate of the Tomlinson Review/Final Report strongly reflects: ‘...how central the intuitive nature of politics is to policy formation’ (2011: 145), a point further reinforced by Mike Tomlinson’s own observation that Number 10 policy advisors were urging Blair to “...look at the educational politics of it as distinct from the educational importance of it” (Bangs *et al*, 2011: 146).

- **The EPQ: same again or something new?**

One further question remains regarding the Tomlinson Report, and that is to do with the considerable emphasis placed on the extended project (as it was then termed) and why it was deemed to be: ‘a major feature of our proposals’ (2004: 32), particularly as the Report goes on to acknowledge that a project of this type is not a new idea. During an informal interview undertaken by the researcher with Sir Mike Tomlinson (9.11.2011), he was asked to explain why the EPQ had been included in his proposals. He began by referring to the

International Baccalaureate (IB) which, significantly, also requires learners to complete what the Final Report describes as a 'personal project' though it is in fact an extended essay intended to allow students to explore in detail a particular topic within a subject being studied (Hill, in Phillips & Pound, 2003: 52). For Tomlinson, the IB was a major inspiration behind the Working Group's plan to develop the Diploma as a single qualification framework comprising a core of elements, including the extended project. As with the IB, the Diploma structure was intended to be "more than the sum of its parts", according to Tomlinson, and was an attempt to bring about curriculum coherence, within which the project would play a vital part. It would provide "the glue" that would combine subject study undertaken through, for example, A levels or vocational learning programmes, alongside the development and demonstration of higher order skills. Tomlinson observed that the opportunity to bring together skills development and subject knowledge had been entirely missing in the then existing curriculum, and that most students were therefore unable to combine knowledge and skills in this way, both during and beyond their 16-19 learning experiences. This may also explain the importance placed by the Working Group on inclusion of an oral presentation enabling learners to set out a coherent argument for their project, as part of the assessment process.

Tomlinson emphasised the role played by consultation, post-Interim Report, in confirming the potential value of including the extended project within their final proposals. He mentioned the positive responses received from HEIs, especially Cambridge and Russell Group universities, who recognised it as a qualification embodying "the elements they saw lacking in their students". Similarly, employers were enthusiastic because, like universities, they were critical of young people's limited ability to handle the application of knowledge and the poor standards shown with regard to research skills. Of particular significance was the positive stance taken by the teaching profession and

awarding bodies, especially AQA who were keen to introduce it. He also concurred with the point made in the Final Report that: 'Many schools already offer an extended project along the lines we propose' (2004: 32), citing a number of examples, including sixth form colleges. However, it was clear that the extended project, as recommended in 2004, was intended to offer schools and colleges something fundamentally different to what had gone before in that the model proposed would *not* be restricted to a single type of project outcome, as in the case of the IB (ibid: 33). Moreover, it would offer greater flexibility regarding the range of project topics a learner might choose to research, thereby encouraging personalised learning and "raising both their expectations and aspirations". Even so, as Tomlinson mentioned when interviewed, its primary aim when first introduced was to: '...provide a means of synthesising main learning, while integrating it with the core' (ibid.).

In a final word of advice, which strongly harmonises with the concept of enactment and its part in this study of the EPQ, Tomlinson commented on the circumstances essential for successful integration of the extended project into any centre's existing curriculum provision. For him, it would firstly depend on that centre having a clear, shared vision of what their post-16 curriculum is intended to achieve, and of the objectives that all staff would need to fulfil as a result. The EPQ would then need to be placed appropriately within that curriculum, in order to make a positive contribution to the effective realisation of the defined objectives. Despite its undoubted potential value, without identifying a specific, situated purpose for the qualification, there would be little point in attempting to introduce the EPQ.

- 2.2.2 The EPQ: developments, impact and influence

2.2.2.1 Post-Tomlinson to national roll-out (2008)

In February 2005, the government published its first White Paper under Ruth Kelly, entitled *14-19 Education and Skills* (DfES), in which was stated their intention to set out details of their proposed reform programme: 'building from the excellent work of Sir Mike Tomlinson and his Working Group' (DfES: 3). As the Paper makes clear (ibid: 10), New Labour's priorities for education at the time included the need to improve participation rates among 16-19 year olds in England (these were exceptionally low when compared with other European countries) and to radically modernise the 14-19 system so that it would be able to meet both contemporary and future demands. In order to achieve these aims, the 2005 reforms were designed to:

- 'place a greater focus on the basics
- offer learners a better curriculum choice
- provide learners with more challenging options and activities
- provide new ways of tackling engagement.' (QCA, 2006b)

Great emphasis was placed in the White Paper on the importance of achieving long-term change through carefully charting the steps that would need to be taken, in order to develop a system that would be: 'fashioned around the needs of the learner and ... responsive to the needs of employers' (DfES, 2005: 11). Moreover, ensuring that every young person could access the opportunity to become both educated and skilled was now deemed to be not only an economic but also a moral imperative (ibid: 15). Yet again, and clearly reiterating Tomlinson's earlier concerns, particular anxiety was expressed regarding the considerable burden that assessment requirements continued to place on teachers and FE lecturers, and also over the low credibility and status of vocational education and training. The transformation of opportunity with

respect to the latter was seen as: 'the most important task facing us in 14-19 education' (ibid: 45).

Thus, despite Blair's previous rejection of Tomlinson's proposal for a unified general Diploma system, one of the White Paper's most radical recommendations was the introduction of a new system of Diplomas that would build on the Working Group's proposals for specialised Diplomas in vocational areas at Levels 1, 2 and 3. These Diplomas could contain GCSEs or A levels as well as specialised vocational material across a range of 'lines of learning', but it was stipulated that GCSEs and A levels, being internationally respected, would be retained as a cornerstone of 14-19 learning. In effect, the Paper confirmed that the only qualifications available to young people in future would be GCSEs, A levels and Apprenticeships, together with those that would be approved for study within one of the Diploma lines.

With regard to Tomlinson's other 'flagship' proposal, the extended project, the White Paper welcomed this proposed free-standing qualification as an ideal means of increasing stretch and challenge for learners at advanced level. They therefore suggested that students might be encouraged to take it instead of a fourth or fifth AS level and authorised the Qualifications and Curriculum Authority (QCA) to develop an overarching framework and detailed specifications, drawing on similar, existing qualifications. Interestingly, it was stipulated that the QCA should consult with both employers and HE in so doing. In addition, it was intended that the project should be made available to learners on specialised vocational routes and could be made a requirement on some Diploma lines, given the fact that existing vocational qualifications such as BTEC Nationals already included an extended project (ibid: 63). Finally, in order to test the new qualification's draft framework and criteria, QCA was asked to pilot these with a number of centres, starting in autumn 2006, whilst

steps would also be taken to examine how to develop it as a national entitlement for all.

- **QCA's contribution to the EPQ's development**

By May 2006, QCA had not only developed a draft framework and criteria for the extended project (as it was still called) but had also begun a process of consultation via online questionnaire. The document to accompany the questionnaire (QCA, 2006a) indicates in the range of examples it provides, that most students should have the opportunity to choose from a diverse range of project topics, perhaps more so than was initially envisaged in either the White Paper or even Tomlinson, including career-related investigations, events organisation and even citizenship-focused community projects in another country – distinguishing it even further from other, existing project-focused qualifications. It also clearly points the way to the inclusion of the project's 'taught element' (described in Chapter 1) as a means of helping to develop students' meta-cognitive skills to enable them to reflect on and monitor their own thinking processes (ibid: 3).

QCA commissioned two awarding bodies (Edexcel and AQA working in collaboration with City & Guilds) to carry out the piloting and evaluation of projects at levels 1 and 2 (over one year) and the extended project at Level 3, which took place over two years – from autumn 2006 to summer 2008. With regard to the Level 3 piloting, both organisations prepared slightly different models for testing. Simultaneously, the Centre for Education and Industry (CEI) at the University of Warwick was commissioned to evaluate all the pilots, taking into account the findings from the awarding bodies' own evaluations. For Level 3, the evaluation focused on consistency and quality, manageability and sustainability, the comparability of the different qualification models and across outcome types and contexts of delivery, and the extent to which the pilots could be seen to be meeting the aims for the qualification as set out in

the 2005 White Paper and in QCA's draft documentation (CEI, 2008). Longitudinal case study data was collected from participating schools and colleges, and consultations were held with awarding body, HE and employer representatives. Supported by findings from the evaluations, QCA produced revised qualification criteria for all three levels (QCA, 2008a), and amended the qualification assessment objectives (see Chapter 1) to ensure greater clarity and progression between levels. Resources, such as promotional leaflets and generic guidance on the extended project for schools and colleges, were produced by both QCA and the awarding bodies, and learning from the pilot projects was shared with new awarding bodies intending to offer the qualification at a later date.

Running concurrently with the pilot phase evaluations for the EPQ was the development, again led by QCA but this time in partnership with the DfES and the Skills for Business Network (SfBN), of the specialised Diploma in terms of its overarching structure and framework (QCA, 2006c). Of particular note is that, as early as autumn 2006, the decision had been made to henceforth include: 'a project offering the chance to show potential, and breadth and independence of learning' (ibid: 5-7) within the generic learning component of all Level 3 Diplomas, thus endorsing Tomlinson's original proposal that an extended project should be included in the 'core' element of all Diplomas. Diploma projects, however, would be distinctive in that learner choice regarding the range of topics they could research would be more restricted than would be the case for students pursuing an extended project alongside A levels, for example. For Diploma learners, the project must be sector specific, providing opportunities to: 'draw on and integrate learning from all components' (ibid.). Through the project, they would be able to:

- show their full potential, interests and creativity within set parameters

- focus on specific aspects of their specialist area and, at the same time, broaden their sector-related learning by linking it to issues within the environment, for example
- develop autonomy and skills for independent learning and carrying out an enquiry, as well as apply functional and personal, learning and thinking skills (PLTS)
- demonstrate their higher level skills and cognitive abilities.

However, as stipulated in the QCA's criteria (2008: 7), it would be the responsibility of each centre to ensure that Diploma-based extended projects did in fact contribute appropriately by confirming that learners' project topics were relevant in one or both of the following ways:

- that it complements and develops the themes and topics for their principal learning
- that it supports learner progression.

From evidence submitted by Diploma pathfinder centres (QCA, 2007) regarding their early experiences of interacting with the extended project, it is interesting to note a description of learners involved in a project-focused partnership with a local university. Not only had they been able to access professional-standard equipment and expertise, but had become more aware of opportunities available beyond the sixth form, such as higher education, and had developed valuable team-building skills (ibid: 92-4). The experience highlighted both the potential benefits and drawbacks of extended project enactment, however. For example, teachers and lecturers expressed concern that, even though external partnership support was recognised and welcomed as a key to success, it could also signal serious resource implications in terms of staffing, timetabling and time commitment, as well as funding for/access to equipment.

In the run-up to the EPQ's implementation as a nationally-available, standalone qualification for first teaching from autumn 2008, one further contributory aspect of QCA's preparatory work must not be overlooked, not least because it had been requested by the government in the 2005 White Paper (as referenced above) and because it helped to form some of the distinctive characteristics of the EPQ's structure, content and implementation. Namely, QCA was asked to draw upon other relevant qualifications in order to situate the new programme within the existing portfolio and, thereby, to learn from current practice and experience. Naturally, the IB was pre-eminent in these qualifications, particularly as it was known to have been a major inspiration for Tomlinson's Diploma proposals, including the project. However, QCA also investigated project-related aspects of the BTEC awards, the French Baccalauréat and the Welsh Baccalaureate (source: QCA Technical Manager for EPQ pilot phase evaluations, interviewed 6.6.2012), generating useful information and guidance for the qualification developers. There follows an outline of key points for each of the four programmes (in part, drawn from unpublished QCA archival materials) which serves to contextualise the EPQ and to illustrate both similarities and differences between the 'old' qualifications and the 'new' EPQ. It should be noted that many of the details provided below are not recent as it is deemed essential to relate the qualifications specifically to the period during which the EPQ was being developed.

a) International Baccalaureate – Extended Essay

First introduced in 1968, the IB was attracting more than 3,000 students in the UK, and around 80,000 worldwide, by 2008 (TES, 2008: 12-13). Notably, since 2006, its popularity had soared in the UK, following Tony Blair's pledge to help fund 'at least one maintained school in every authority [to] offer it by 2010' (ibid.). As the TES observed in November 2008, Blair's enthusiasm for the IB had been echoed by that of university admissions tutors who had voted it as

the top system for helping students to thrive at British universities, even higher than A levels. In their view, the IB, in which students must study six subjects, follow a course on the theory of knowledge and produce a 4,000-word extended essay, was best for encouraging independent enquiry and creativity, partly through the opportunity it offered to study a subject-related topic in depth for the extended essay.

The estimated time to be given to the essay was around 40 hours over the 2-year IB programme. Students could either explore a topic in one of the subjects they were studying or in a subject offered within the IB but in which they would not be examined. In this respect, learner choice was less than for the EPQ generally, although closer to that recommended for Diploma learners. In terms of assessment, both skills and subject-knowledge were required, with the essay being the only type of project outcome allowed (again, more limited than for the EPQ). In addition, there were restrictions on the kind of supporting materials that could accompany the project. In similar vein to the EPQ, candidates were allocated a supervisor who would support and encourage them, help them with research skills and ensure the essay was the student's own work – for a total of around 2 to 3 hours. However, a major difference was that each supervisor must be a teacher with subject-specific knowledge, thereby restricting opportunities to involve others and potentially increasing pressure with regard to staff and staffing. As with the EPQ, students were free to choose their own topic or research question, with guidance from their supervisor as to its scope and suitability.

A guidance manual on the extended essay was provided for centres, giving advice on topic choice, research process and essay presentation, as well as marked examples of essays to ensure consistency. Assessment was based on eight general criteria plus three to four subject-specific criteria and was conducted by an external examiner. The grade awarded – A (excellent) to E

(elementary) – would be combined with those gained from the ‘theory of knowledge’ component.

b) BTEC – Integrated Vocational Assignment (IVA)

Unlike the strongly academic IB, BTEC National Certificates and Diplomas were vocational qualifications that had grown in popularity, particularly during the 1980s, and had contributed much to the development of a unified reform tradition in the UK (Hodgson & Spours, in Phillips & Pound, 2003: 165).

Therefore, it is not surprising that QCA would prioritise BTECs for scrutiny in relation to EPQ development, especially as they offered insight into how project-focused learning could be made to function as a component of a vocational qualification – such as specialised Diplomas – and how it might add value to the overarching programme. BTECs were celebrated for their coherence, being grouped, unit-based awards which recognize: ‘the interdependence of subjects in terms of knowledge, skills and understanding’ (Phillips & Pound, 2003: 2). Of the 12 units that made up the BTEC National Certificate and the 18 units in a Diploma, two would be summatively assessed solely through the IVA, thereby adding substantially to the award’s coherence, in that the project element was by no means treated as a stand-alone component. In effect, both IVA units received double weighting in the calculation used to grade the whole award; thus, together, they held the value of four ‘normal’ units.

The IVA was intended to develop specific skills and abilities in line with the requirements of the sector for which the award catered, such as Business, Building Services Engineering, or Arts and Performing Arts (where the IVA was known as a Final Major Project). Assessment, conducted externally, was designed to focus on skills acquisition and the application of subject-specific knowledge. Unlike the IB, yet very much in line with thinking around the EPQ at the time, BTEC IVAs could be presented in a wide range of styles so that they

might be relevant to the subject/sector in question. For example, students could produce a business plan, a building design or, in the arts, a performance or artefact as their project outcome. However, the major difference between an IVA and an EPQ was that the task for the former would be set by the awarding body and not by the student. Instead, in some subjects such as Business, students were free to choose the context within which to apply the outline requirements of the Assignment. Learners' work would ultimately be assessed against the criteria given for each of the two units covered.

c) Welsh Baccalaureate – Individual Investigation

The Welsh Baccalaureate Qualification (WBQ) was first piloted in schools and colleges across Wales from 2003 and was designed to combine a compulsory core key skills curriculum with existing AS/A2, GNVQ, NVQ and GCSE qualifications. Not to be confused with the Welsh Bac, a proposal that had been heavily modelled on the IB but which was rejected in favour of the WBQ, the Welsh Baccalaureate was a 2-year full time qualification, within which the Individual Investigation was expected to require 10 hours of timetabled contact time plus 10 hours of independent work. It constituted one part of the mandatory core element of the WBQ, which also included Personal and Social education, a component on 'Wales, Europe and the world', work-related education (including working with an employer and an enterprise activity), and Key Skills (Adams, in Phillips & Pound, 2003: 93-116). It was necessary to pass all core components in order to gain the award.

The WBQ was devised as a means of providing post-16 students with a broader education leading to better preparation for either employment or higher education. The Individual Investigation was seen as being an important contributor to the achievement of both these objectives, and also as a suitable vehicle for demonstration of some of the Key Skills (this latter aim was certainly adopted with regard to the Diploma-based EPQ). Initially, students

were offered the opportunity to choose topics or issues for their Investigation related to the 'Wales, Europe and the world' component only but this was eventually changed to allow links to be made with any of the course components. Assessment of the final outcome would be mainly skills-based, with the Investigation being intended to enable students to develop skills of collecting, analysing and evaluating information, and of presenting it in an attractive format. However, as to how to present their conclusions, students were restricted to written (1,500-2,000 words) or oral presentations, or the use of drama or video. Artefacts would not be allowed.

Because at the time, the WBQ was still a relatively new qualification, little guidance had as yet been produced (*ibid.*) regarding the specification for the Individual Investigation. Students were expected to discuss their topic choice with their teacher/tutor and must gain approval from the Consultative Moderator attached to their centre. Outcomes would be internally marked at Pass or Fail, followed by external moderation by the Consultative Moderator.

d) French Baccalauréat – 'Structured Personal Project' (TPE)

Created in 1808, the French Baccalauréat has always been considered as the link between secondary and higher education, validating the end of the first and providing access to the second (Martin-van der Haegen & Deane, in Phillips & Pound, 2003: 77-92). Two main 'pathways' were instituted: firstly, the General Baccalauréat, comprising three strands of ES (economic and social), L (literary), and S (scientific); and, secondly, the Technical (or vocational) Baccalauréat. Introduced experimentally in 1999, TPEs (Travaux Personnels Encadrés) were components of all forms of the Baccalauréat, although a form of project activity known as a 'PPCP' had been introduced into the Technical version as recently as 2001. Interestingly, the PPCP was used as a major tool for enrichment within the Baccalauréat (anticipating the approach taken currently in a number of centres with regard to situating the EPQ

appropriately within their existing curriculum), with students working in groups on cross-curricular projects involving several subjects and designed to build knowledge and know-how linked to the world of work (ibid: 86-87).

Within the General Baccalauréat 'strands', at the time of QCA's research, the TPE was completed over a period of about a year (2 hours per week) during the second and third years of a 3-year full time programme and was the only component not to be assessed by written examination at the end of the course. Students were expected to work in small groups rather than to produce an individual project (as happens in the majority of EPQs), and, although participation had been made compulsory since 2003, submission for assessment remained optional. In particular, the TPE was intended to develop teamwork and research skills as well as the application of knowledge and skills. However, 'depth of knowledge' was also included in the final marking process undertaken by the teacher responsible for supervising the TPE.

With regard to the number of ways in which students could choose to present their project outcomes, the French Baccalauréat had much in common with Tomlinson's vision of the extended project. All TPEs had to have an end product which could be in any suitable form, including artefacts such as a video, model or website, or a performance, design, or piece of writing. Normally, they would be accompanied by a written description of the process and must include an oral group presentation, lasting around 30 minutes, which would also be marked. The use of timetabled sessions specifically focusing on the TPE, and supplemented by students' independent research time, again anticipated the notion of the 'taught element' in the EPQ. Similarly, the TPE logbook, highly regarded as an important resource for evaluating the work undertaken by each student and the distance they had travelled during the course, is strongly reminiscent of documentation to be completed as part of an EPQ - the Project Progression Record (PPRs), Production Log or Activity Record.

Where it differed was in terms of student choice regarding topics for their TPE. Each year, a range of themes would be set externally, with teachers then making a selection for their students and deciding which disciplines or subjects were to be covered. Finally, students would be able to choose from the selected themes and decide on the research question they planned to address.

Following on from QCA's comparative research into other qualifications, together with scrutiny of evaluation outcomes, several important issues emerged that merited particular attention during the process of designing the EPQ, as recalled by QCA's then Technical Manager (when interviewed, 6.6.2012). For example:

- **Accreditation** – would it be necessary to accredit projects? It was decided it would be essential to accredit in order that centres could justify the time used on completing a project; in addition, accreditation (and marking) would help to sustain the motivation and commitment of staff and students.
- **Employer engagement** –the pilot phase demonstrated scope for this in terms of supporting students to formulate hypotheses and research questions, developing a brief and/or a work context or real-life problem, and ongoing mentoring or supervision; however, teachers' ability to 'think outside the box' was considered a potentially inhibiting factor in this respect.
- **Plagiarism** – a major issue raised by many stakeholders, particularly in relation to the proposed internal assessment process; QCA decided that external marking against the assessment objectives would in fact have been a less reliable process and therefore recommended a middle road of internal marking and standardisation/external moderation.
- **Project content and grading** – a non-restrictive approach was adopted, but grading was not considered appropriate.

- **Taught element** – both policy makers and planners agreed this must become a compulsory part of every EPQ programme, based on good practice noted in pilot centres, in order to ensure all students would receive adequate time for skills development and personal support. However, to begin with, this gave rise to some confusion as to what should actually be included in the GLH allocated to the ‘taught element’ – should it include supervised independent study, for example? Also, what should be taught – should it include techniques on writing effective essays as in A level courses? These issues, together with the amount of actual time given to the taught element by different centres, were not initially formally monitored by awarding bodies, though this has since become the norm.

2.2.2.2 EPQ: early development and impact

Following the replacement in 2007 of Tony Blair by Gordon Brown as Prime Minister, the government issued their Children’s Plan (DCSF, 2007) in which was presented a number of long-term, ambitious goals for 2020 with the underlying aim of bringing children’s services together and moving away from a separate education service. At the same time, however, as economic conditions worsened across the country, they had no choice but to scale back on their intended rate of increase for education funding, even though the size of the education workforce was rapidly increasing (Abbott *et al*, 2013: 166-7). Nevertheless, the air of optimism persisted with regard to the future of education, as reflected in governmental commitment to raising the participation age to 17 by 2013, and to 18 by 2015. It was further demonstrated by the new Education Secretary, Ed Balls, in publishing firstly a Consultation Paper (DCSF, 2008a), setting out New Labour’s strategy for implementing: “a world-class education system for all 14-19 year olds, giving every young person the opportunity to make the most of their talents” (ibid:

1), and then later the same year, *Delivering 14-19 Reform: Next Steps* (DCSF, 2008b). Together, these two documents marked the final stages in the official approbation process for both the newly 'capitalised' Extended Project and the new Diplomas (now shorn of their 'specialised' nomenclature).

References to the Extended Project in the Consultation Paper (2008a: 26-7) appear to confirm its increasing recognition as an essential component of 14-19 qualifications reform, linked as it is to the overarching plans for strengthening A levels. Positive outcomes from the pilot evaluations are mentioned and recommendations are accepted, such as the need for a nationally funded programme of workforce training and support materials. Even so, caution is now exercised as to the notion of making the qualification an entitlement, despite the desire to address the needs of HEI admissions procedures:

4.7 '...we want to make sure it is available to all. The Project will be an integral part of Advanced Diplomas and so available in all consortia by 2013. We shall ... judge how we might make it effectively an entitlement to all students studying at level 3, and how quickly that might be done – looking at the impact on teachers and institutions.'
(ibid: 27)

By the time *Next Steps* (2008b) was published, the government was looking to achieve: 'a streamlined qualifications system that works effectively and delivers value for money' (ibid: 9). To this end, Ofqual was established as an independent regulator of qualifications and tests, and virtually all publicly funded qualifications would in future have to fall within one of four routes or broad learning programmes (ibid: 23) – Apprenticeships, Diplomas, the Foundation Learning Tier, or General Qualifications (GCSEs and A levels). As for the Extended Project, this was to be introduced alongside the newly reformed and strengthened A levels, as a means of giving young people:

‘...the planning, preparation, and research skills that universities and employers are looking for. It has already been widely welcomed by schools and colleges and by HE institutions, many of whom are encouraging prospective applicants to take one up.’ (ibid: 33)

The qualification was immediately made available for first teaching from September 2008 through a number of awarding bodies, including AQA/City & Guilds (2008) and Edexcel (2008), both of whom had already produced specifications for the pilot phase (AQA/C&G, 2007); (Edexcel, 2007), and through which the abbreviated name of ‘EPQ’ had gradually become common usage. They were joined by EDI (2007), OCR (2008) and WJEC (2010) and, according to Ofqual’s Register of Regulated Qualifications, by VTCT (2010 – since withdrawn). As long as they worked within the remits of QCA’s official criteria for the EPQ (2008), combined with revised regulatory ‘recognition’ criteria and operating rules drawn up by Ofqual (2008) with regard to the Diploma and its component parts, awarding bodies were free to interpret in slightly different ways exactly how the new qualification should be enacted. This in turn provided schools and colleges with choice as to which form of the EPQ would most suit their circumstances and objectives for introducing the qualification. For some, this may have equated to the fact that the EPQ was to be delivered within the Advanced Diploma programme, rather than as a standalone, optional qualification for students. Other centres may have been influenced by the variations in key documentation complexity and design, the level or type of ongoing support available to them, the cost of entry per capita, or the amount of written material expected by some awarding bodies from both the candidates and their supervisors.

The initial cohort of candidates submitting completed projects for assessment in 2009 was, perhaps understandably, small in size at only 5,094 (see Figure 2.1 below). However, by the time the Coalition government of Conservatives and

Liberal Democrats had overturned New Labour in 2010, there had been an astonishing year-on-year increase of 217.28% in total EPQ submission numbers, to 15,958 candidates (source: JCQ). Reasons for this phenomenal increase in take-up can only be speculated upon but may in part be due to the quality of guidance materials and resources published by QCA (see for example: QCA, 2008) together with the wealth of promotional materials and downloadable resources for both teachers and students swiftly made available by respective awarding bodies. Training for centre-based coordinators and supervisors was also organised by each awarding body, again responding to the government's stated commitments, and centre-specific support was made available as required. Above all, the numbers clearly testify to the fact that the EPQ was beginning to fill an important gap in the qualifications 'landscape' for both post-16 learners and providers.

- **Early impact on Higher Education**

Focusing on the perspective of HE institutions, one of the earliest and most detailed sources of information regarding their attitude to the EPQ can be found in a Report (2008) issued by the 1994 Group of research-intensive universities. The Group had undertaken a joint research project with the DCSF over the previous year to assess the likely impact of the changes to 14-19 education on their members. The resulting Report clearly demonstrates a good level of support for the free-standing Extended Project from responding senior managers, Pro-Vice-Chancellors and admissions tutors, who welcomed its recently-bestowed UCAS tariff as increasing its attractiveness to students, and viewed it primarily as: 'an additional qualification that would add to the profile of applicants' (ibid: 25). Interestingly, particular enthusiasm was shown over the Project in its capacity as a component of the Advanced Diploma, where: 'it would help prepare students for the type of teaching and learning that they would experience on undergraduate courses' (ibid: 29). Some concerns were

expressed, however, which tend to echo those of other stakeholders previously mentioned, including whether centres would be able to offer effective supervision and whether all students would be able to access: 'the necessary facilities and resources to ensure that higher-level skills of analysis and evaluation were integral to [*their*] work' (ibid.).

It is important to note that only 54% of respondents reported having received information on the Extended Project prior to completing the 1994 Group's questionnaire survey. Moreover, the Report's description of the qualification is somewhat limited, in that it refers to it solely as a 'dissertation-like' exercise involving 'independent research, thought and planning' (ibid: 13) which may have been slightly misleading for some respondents. Nevertheless, the research findings indicated that, of all the government's planned reforms for 14-19, the Extended Project held the broadest appeal to admissions tutors (ibid: 35-41), regardless of its subject. From their perspective, its potential and perceived flexibility would provide particular scope for use in Clearing and when selecting between students with similar levels of achievement. Moreover, they welcomed its potential for enhancing study skills and felt it would certainly align with undergraduate modes of study. However, caution was expressed over four aspects: validity and reliability of Project assessment methods; the burden that taking an extra qualification might place on students and the possible dilution/skewing of their knowledge base as a result; the ability of applicants to effectively communicate achievements and benefits gained from their Project work during university application processes; and the Project's potential for encouraging plagiarism. In all, however, the 1994 Group of universities considered they would be closely interested in any applicants presenting with an Extended Project, despite the challenges foreseen in its implementation.

2.2.2.3 EPQ: developments and impact post-2010

As noted by Abbott *et al* (2013: 181), from the moment it assumed power, the Coalition government: ‘operated against a background of severe economic and financial problems’ in which the overwhelming imperative was to reduce the deficit through making cuts to public expenditure – including spending on 16-19 education. This did not mean that the overall pace of reform would be slowed down, compared with the activities of the previous government, but that education policy would be radically reviewed, reshaped and refocused, with new priorities such as the need to promote greater autonomy and accountability in schools, and improved choice for all, taking centre stage (DfE, 2010). From the perspective of the new Education Secretary, Michael Gove (interviewed in Abbott *et al*: 189), the Coalition’s intention, at least to begin with, had been to preserve continuity and reform momentum. Moreover, Gove believed that clear links could be traced between the Coalition’s imperatives for education and New Labour’s policy as set out in their 2005 White Paper. To some extent, this may also explain the speedy commission of Alison Wolf in 2010 to conduct a radical review of vocational education. However, the government’s eventual response to the findings and recommendations of The Wolf Report (DfE, 2011a), particularly with regard to her opinion that previous ‘well-meaning’ attempts to prove parity of esteem between academic and vocational learning were clearly groundless (ibid: 8) appears to have been of a considerably different nature to that of New Labour. In effect, rather than looking for ways of closing the academic-vocational divide, the Coalition sought to: ‘raise standards by moving towards a curriculum that places more emphasis on academic subjects’ (Abbott *et al*: 187). Their aim was to refocus on academic standards and away from the ‘perceived lower aspirations of vocational qualifications’ in order to provide more – and presumably, better – opportunities for young people (ibid: 188).

In light of the policy context outlined above, it seems fortunate for the EPQ that it had always been promoted as a learning programme suitable for and relevant to both academic *and* vocational learning purposes. Vocationally, it formed a compulsory part of sector-specific Diplomas and could be used as a means of researching personal career aspirations or work-related topics; academically, its reputation within the HE community for effectively preparing young people for the rigours of undergraduate study was rapidly gaining hold (Universities UK, 2009: 11) and this soon became a major rationale for centres wishing to integrate it into their existing curriculum provision. Also advantageous was the fact that the EPQ had been approved as a free-standing qualification in its own right and not solely as a component of generic learning within Diplomas. Otherwise, it might so easily have suffered the same fate as the overarching 14-19 Diploma system which was ominously stripped of its 'national entitlement' status in the Coalition's first Education Act (DfE, 2011b). Since before the change of government, concerns had been growing about its perceived lack of popularity with learners, compared to other vocational and vocationally-related qualifications (DfE, 2011a: viii), and whether or not it would actually provide for employers: '...all they want from the qualifications they have helped to form' (Ertl & Stasz, 2010: 314). Calls had been made for it to be refined and restructured, perhaps more in line with a BTEC, and to make it a more flexible and varied programme (DfE, 2011: ix). Moreover, it had been noted that:

'Significant resistance to the Diploma exists among providers, and while some of this is based on experiences of exploring the potential to deliver the Diploma, there is a general underpinning issue about the extent to which there is a cultural willingness and commitment to the Diploma.' (ibid.)

It was hardly surprising, therefore, that the new government should have taken the decision, towards the end of 2011, that Diplomas should be gradually withdrawn. As for the EPQ, entry figures show that, by 2012, they had expanded to 28,572 (*Figure 2.1*, column 2), and that the number of participating EPQ centres had increased from 59 in 2008 to 1,200 (source: TES).

As observed by Stephen Exley in the same year, Diploma courses were by then 'virtually extinct' and project work was becoming less and less significant in A levels and GCSEs under Gove's reforms, but this meant that:

'...the EPQ stands alone in opposition to Gove's ideological purging of coursework, offering an unparalleled degree of autonomy and flexibility for learners.' (TES, 22.6.2012: 4)

Consequently, whilst most of the major awarding bodies had already decided to cease offering Diplomas, it was not long before AQA (2013) and City & Guilds (2014) resolved to start offering their own versions of the EPQ, with AQA also promoting it as a compulsory part of their AQA Baccalaureate (AQA Bacc) programme. All the main participating awarding bodies had by now produced EPQ-dedicated websites stocked with a wealth of easily-accessible resources, including case study examples of student, supervisor and/or centre good practice, completed exemplars of EPQ forms such as student logs, annual Lead EPQ Examiners' reports, guidance and advice. Most boards were also keen to learn from their 'customers' and welcomed their feedback, on which future qualification revisions and new developments might be based; for example, the wording of learning outcomes and assessment criteria, as well as the layout of documents to be completed by students or staff have all been influenced in this way. Many of these activities have persisted over time and have been supplemented by innovative workshops and, in some cases, by EPQ-focused conferences and training events, assisting the development of several dynamic and interactive EPQ 'communities'.

- **Recent HE perceptions of the EPQ**

Certainly, by 2012, the majority of HE institutions were openly expressing their admiration for the EPQ and the skills students could develop through participation in the course which, as noted as far back as the pilot phase evaluation, were not skills assessed in any other qualifications (CEI, 2008). Many universities had already established policies regarding the qualification, though not all of them formally recognised it – in part because it was still not recognised for admissions purposes by the then Universities Minister, David Willetts. As Exley noted at the time:

‘...while there is no limit on the number of students that universities can enrol with two As and a B at A level, the EPQ does not yet count towards this target.’ (TES, 22.6.2012: 7)

Nevertheless, as he goes on to observe, some universities such as the University of Warwick were already prepared to accept an EPQ in place of an AS level for courses where a specific fourth AS subject was required and HE confidence in the qualification was steadily increasing. Since then, more universities have adapted their admissions policies in recognition of the quality of the EPQ and advertise their stance online; for example (as at 2018):

- **Southampton** – the first to introduce an alternative offer scheme for applicants excelling in the EPQ; they assert it to be an excellent preparation for the kinds of independent study necessary to succeed at a research-intensive university
- **Leeds** – individual academic schools decide whether the EPQ is used in their offer-making; on occasion, admissions tutors may make an alternative offer involving successful completion of the EPQ and applicants are therefore encouraged to provide information on their project in their UCAS personal statement and at interview

- **University of East Anglia** – as from 2017, UEA set up a number of ‘Bright Spark’ Scholarships for EPQ candidates interested in studying with them; to be eligible, students must choose a topic linked to a UEA School of Study, achieve an A* or A grade and achieve AAB at A level (or equivalent).

In addition, many universities have committed time, staffing and resources to supporting schools and colleges in delivering the EPQ. A large number offer both centre- and university-based information workshops and seminars for students on topics to do with project management or academic research skills (Hertfordshire; Brunel; Southampton), and provide access for students and supervisors to distance learning toolkits and other free online resources via Moodle or UniBox (Wolverhampton; Southampton; UEA; Manchester). Others such as Southampton offer students access to their library resources and some, such as Manchester, have also been known to put students in contact with its post-doctoral researchers where there is a perceived overlap between their work and an EPQ project topic. UEA has also instituted regular campus-based EPQ Conferences for existing EPQ coordinators/supervisors as well as teachers/tutors interested in running the programme.

Of particular benefit to HE – and to the enhancement of the EPQ’s reputation – have been some of the research projects commissioned in recent years by Cambridge Assessment. Of particular note was that carried out by Gill & Rodeiro (2014) regarding the predictive validity of Level 3 qualifications, including the EPQ. The main aim of their work was to identify the extent to which: ‘the effectiveness of the results in that qualification [*might be considered*] as predictors of undergraduate degree performance’ (ibid: 4). A good relationship was found to exist between grades in the EPQ and degree class at university, ‘...with the highest percentage of first class degrees achieved by those getting top grades in the qualification’ (ibid: 5), suggesting that the qualification would indeed be a good predictor of university

performance. Moreover, the findings proved that, of two students with the same A level performance, the one with an EPQ had a higher probability of achieving a good or first class degree.

- **EPQ impact on post 16 curriculum and qualifications**

With its emphasis placed squarely on self-directed, independent learning, and with the individual student taking responsibility for selecting not only the topic to be researched but also the process of its investigation, and the manner in which the final project outcome is to be presented, the EPQ exhibits many distinctive characteristics and offers opportunities that seldom occur in other post-16 qualifications and learning programmes. Furthermore, for EPQ supervisors, it sets a particular pedagogical challenge as the EPQ specification clearly expects them to assume a different kind of relationship with the learner, and to take a (virtually) non-prescriptive part in each project's development process, as well as in its eventual outcome and presentation. They must learn to step back from the 'teacher' role in favour of one based on facilitating, mentoring and monitoring. From the perspective of transferability of skills, therefore, it must surely be conceivable that supervisors are likely to apply effective practice experienced through interaction with the EPQ to other areas of the curriculum in which they teach, and that learners are also likely to use EPQ-related skills and knowledge elsewhere – as further discussed later in this section. In effect, is it not unreasonable to suggest that as a result, and within a comparatively short period of time, the EPQ has begun to influence considerable change over education's more traditional perceptions and practices regarding 'project-based learning' (PBL)? As discussed in the previous Chapter (Section 1.2.1), Leat (2017) implies that the EPQ is more an example of *enquiry* & project based learning (EPBL) than of PBL, given that EPBL requires students to: 'take control and have an active engagement with the subject matter' (2017: 39) and that through this interactive experience, they

themselves are 'transformed' in terms of their perceptions and attitudes towards the subject matter. However, it is likely that EPBL remains at present a term that is generally less commonly encountered or fully understood by school/college practitioners than is PBL, as a result of which the EPQ often continues to be described as a form of PBL in many institutions. As Gilbert observes (TES, 8.1.2016: 48), an official definition for PBL is that it is an activity with "a publicly exhibited output" in which students receive a simple brief in order to achieve the output. In such instances, unlike the case of the EPQ, the project brief is set *for* the students, not *by* the students and the output is likely to be planned and organised in advance with regard to format, content, style and specific curricular relevance. To date, little research has been undertaken into the EPQ's wider impact on teaching and learning but anecdotally, including observed activity in the centres visited for this research, there is some evidence to suggest that key characteristics, as well as teaching and learning practices closely associated with it, are permeating many other parts of the curriculum, and across age ranges. In particular, following direct and indirect contact with EPQ enactment, as for example through CPD, teachers and tutors have been seen to demonstrate an increased level of confidence in their students' ability to independently create, manage and sustain their own learning 'journey', and to adapt their approach accordingly in other subjects.

As noted above, it is also interesting to consider the extent to which students' learning and performance in other qualifications they are taking may be benefiting from the skills they gain from the EPQ. Gill (2017) observes that the CEI pilot phase evaluation (2008) had early on suggested that this might be the case, and that Jones (2015) had subsequently conducted quantitative research to show that taking an EPQ alongside A levels: 'increased the odds of achieving a high grade (A* to B) at A level by 29 percent' (Gill, 2017: 27). Following on from Jones, Gill conducted further quantitative research focused on identifying any difference in performance in other qualifications between students taking

or not taking the EPQ. His findings showed there to be a small but significant benefit and also noted that the effect of the EPQ was greater for those with higher prior attainment, implying that the EPQ may benefit brighter students most. In addition, male students tended to benefit more than female students from taking the qualification. However, he stressed that caution should be exercised, in that: 'it may be that students taking the EPQ are more motivated to do well academically than those not doing so and it is this ... that enables them to do better in their A levels' (ibid: 33).

Further evidence of the EPQ's wider impact relates to its apparent effect over the past ten years on two specific A level subjects that have, in the past, been noted for their popularity: General Studies and Critical Thinking. Despite their ability to attract a steady following and, in the case of the former, high numbers of candidates, both have seen a catastrophic decline in entry numbers over the past ten years and are now due to be withdrawn. General Studies, introduced in 1954, had been intended to provide a focus and identity to non-specialist studies in the sixth form. At the time of Dearing, it was: 'a widely-used means of broadening the curriculum, and ... the second most popular A level in terms of entries' (1996: 62). As shown on the comparative Table below (*Table 2a*), in 2009, the first year of assessment for EPQs, General Studies was attracting 50,012 entries compared with the EPQ at 5,094, and was rated the most popular of all A level subjects. A substantial reduction in numbers then occurred, year-on-year, whilst the EPQ steadily increased in entry numbers until, by 2013, the new qualification stood virtually on a level with the long-established General Studies – 30,401 (EPQ) compared with 31,562. By 2015, the DfE made the decision to abolish General Studies as part of its reforms of AS and A levels and, between 2015 and 2017, entry numbers had declined so much that it gained first place in the top ten of 'decreasing' A level subjects. Latest available entry figures (for 2018) now show General Studies numbers to have dropped well below that for the first cohort of EPQ

entrants in 2009, with General Studies attracting only 3,422 entries. In contrast, the 2018 entry figures for the EPQ stood at 40,437.

Academic Year	EPQ entries	Yearly % increase	Entries for GCE Critical Thinking	Yearly % decrease	Entries for GCE General Studies	Yearly % decrease
2018	40,437	1.1%	26		3,422	
2017	40,013	12.3%	45		7,147	-39.2%
2016	35,608	6.1%	117		11,759	-35.0%
2015	33,564	1.0%	236		18,092	-24.25%
2014	33,245	9.04%	529	-46.6%	23,884	-24.3%
2013	30,401	6.40%	990	-11.37%	31,562	-11.24%
2012	28,572	18.59%	1117	-35.10%	35,558	-13.24%
2011	24,099	51%	1721	-17.34%	40,984	-12.37%
2010	15,958	217.28%	2082	-16.42%	46,770	-6.48%
2009	5,094	First assessed cohort	2491	-1.50%	50,012	-8.87%

Table 2a: EPQ candidate submissions (Source: JCQ)

A much more recent addition to A levels than General Studies is Critical Thinking (2005). Although entry numbers have always been substantially smaller than for either General Studies or the EPQ, the subject had managed to maintain its popularity over its early years. However, in 2012, it suffered a considerable decline of -35.10% over the previous year's figures and by 2014, entry numbers had halved and the decision was taken to abolish it in the following year. Since then, entry numbers have been steadily vanishing as centres have removed it from their subject provision. Although it is not appropriate to attribute the demise of these two qualifications solely to the introduction of the EPQ, it is widely agreed that the EPQ has supplanted both subjects in terms of popularity because: "it develops a wider range of skills in a way that general studies doesn't" (John Dunford interviewed in Stewart (TES, 2010), and actually delivers much of what Critical Thinking was designed to do

but in a more attractive, personalised and motivating way for students. Other notable factors of particular relevance to the abolition of General Studies include concern that students often received little or no formal teaching before their exam, leading to disengagement from the course, and that many Russell Group universities only accepted it as a top-up to other A Levels, thereby undermining its value (Wiggins, 2015: 2).

Finally, it is essential to reflect on evidence testifying to the continuing impact and influence the EPQ has had on vocational/technical education. In particular, to consider the contribution it has made to the development of new qualifications and programmes in this domain, following the demise of 14-19 Diplomas with which it had been so closely associated. It may be true to say that for many schools and colleges, the EPQ primarily represents an effective means of equipping students with the knowledge and skills essential for undergraduate study and for increasing their chances of success during the admissions process. However, it is also important to remember that it was originally designed to be a qualification suitable for both academic *and* vocational learners (DfE, 2005), offering scope for attracting and meeting the needs of a wide range of young people at Level 3, not solely those applying for a university course. As awarding bodies' specifications clearly explain:

'It allows learners to create an extended piece of work that can complement their studies in, for example, A Levels, City & Guilds Technicals, NVQs or other academic and vocational qualifications including apprenticeships.' (C&G, 2018: 6).

'Students may choose to take the Extended Project Qualification as an extension from studies for any other qualifications at Level 3 (GCE, BTEC, NVQ, other academic or vocational qualifications including Modern Apprenticeships).' (AQA, 2015: 3)

As previously noted, the flexibility of content and outcome afforded by the EPQ makes it an ideal vehicle for students keen to explore career aspirations and employment-related problems, work environments or work placement experiences. It is not surprising, therefore, that it came to be chosen as a component of the Technical Baccalaureate Standard (TechBacc), first proposed for 16-19 year olds by the Skills Minister in April 2013 (DfE/BIS) as a means of recognising those: 'who have achieved the highest levels of technical training' (2013: 28). The TechBacc (DfE, 2014) was designed to be a high-quality, stretching route for young people aspiring to a technical career in which students would be required to follow a suite of advanced (Level 3) programmes. These could include A levels but must include at least one DfE-approved Tech Level qualification – 'on a par with A levels and recognised by employers' (ibid: 5) – a Level 3 maths qualification and an EPQ. This third component would provide students with an opportunity for undertaking:

'...research projects with an industry-focus, relevant to their vocational programme ... [to] equip them with a breadth of knowledge and understanding to strengthen their employability.' (ibid: 6)

The aim is curiously reminiscent of that articulated for EPQs within the now-defunct 14-19 Diplomas but is still eminently laudable, holding as it does the potential for opening up access to the EPQ for many more students in centres attracted to the idea of offering TechBacc study programmes. Several awarding bodies such as City & Guilds and AQA have also been moved to develop similar programmes with the EPQ as a compulsory component, such as the Level 3 AQA Baccalaureate.

In recent years, government policy has continued to prioritise reform in the fields of further education, training and qualifications, particularly with regard to the publication of The Technical and Further Education Bill (DfE, 2016); also in 2016, radical recommendations on a streamlined approach to technical

education (Sainsbury, 2016) were formally accepted (BIS/DfE, 2016). In particular, the phased introduction of Technical Levels (T-Levels) will commence from 2020, providing all 16-year olds with a choice of two main routes: the academic or the technical option. T-Levels are 2-year courses, intended to replace the massive number of free-standing courses in the existing post-16 vocational qualification system with a set of overarching study programmes leading to technical qualifications. Comprising fifteen 'high-quality routes', each T-Level will contain a common core of English, maths and digital skills as well as a set of occupational specialism parts, equal to the size of three A levels in total, and a substantial work placement. According to OCR's website, further employability, enrichment and pastoral provision may be included in the study programme, according to a centre's preferences.

Although there appear to be no explicit, official plans as yet for actively promoting or incorporating the EPQ *within* the new T-Level framework, nor the extent to which the Technical Baccalaureate is likely to be subsumed within it (or replaced by it), there would seem to be ample opportunity for centres to offer it *alongside* T-Levels as part of their optional enrichment/employability provision, much as some colleges currently offer it alongside students' academic programmes. In this way, it could add a motivational dimension to technical education courses, and potentially assist students in developing and applying entrepreneurial/business skills in a real-life context as well as enabling them to build stronger and more purposeful relationships with employers. Interestingly, ASDAN – already well-known for its vocational/technical qualification output – has recently published a new EPQ specification (2018) to add to the existing portfolio. However, ASDAN's approach differs slightly from those developed by other awarding bodies, in that it has located its new version of the EPQ within '14.2 Preparation for Employment' as well as the more usual '14.1 Foundations for Learning and Life' (Ofqual subject/sector classifications). Further, although the ASDAN EPQ is

described as providing learners with: ‘the skills that employers and higher education are looking for’ (ibid: 5), note that the emphasis is placed first on ‘employers’ rather than on HE; later on, note also the distinctive reference made to work experience records as a required form of assessment evidence (ibid: 8-11). Only time will tell whether ASDAN’s version of the EPQ will be successful – and whether it may actually become the preferred choice of students pursuing a T-Level.

2.3 Locating the enactment process

I now turn to considering three key aspects relating to the second of my core components for this study, the ‘enactment’ process. Firstly, my intention is to continue my investigation of its background, begun in Chapter 1, in order to further contextualise the approach taken by Ball *et al* (2012) in relation to the EPQ. Secondly, I propose to consider the notion of ‘contextual dimensions’, to clarify what the term denotes and how it has been adapted to suit the requirements of this specific research project. Finally, Section 2.3 will conclude with an overview of the kind of characters who may be seen to be ‘enacting’ and ‘interacting’ with the EPQ, in preparation for the discussion of findings to be later presented in Chapter 4. Based on the ideas put forward by Ball *et al* (2012) with regard to ‘policy actors’, my aim is to describe what may be termed as the key EPQ ‘learning programme actors’ by identifying some of the activities in which each is most likely to engage.

- 2.3.1 Enactment and the EPQ

In the previous sections of this Chapter, I have attempted to ‘locate’ the EPQ by firstly considering the political and educational circumstances giving rise to its origins in Tomlinson, and then by tracing its evolution and influence over

the ten years since it became an approved national qualification, taking into account the changing contexts, attitudes and governmental priorities within which the EPQ has been developed. In so doing, one purpose has been to provide a fuller understanding of the ways in which the qualification has been *externally-encoded* over time, this being the first element of the ‘enactment’ process and of this study’s Conceptual Framework (see Appendix B and Figure 1.3). What has become apparent from this review is how closely policy enactment and learning programme enactment are interrelated and interdependent, resulting in both planned and unplanned change over time (Research Question 3) and thereby impacting on all four elements of the enactment process (Development/encoding; Interpretation/decoding; Translation/recoding; Operational/practices & procedures). Initially, one might expect this to be solely or primarily a one-way process – the former (policy) constantly exerting powerful influences on the latter (the EPQ/learning programmes), and on its enactors; however, certainly in the case of the EPQ, it would appear also to occur in the opposite direction as, for example, its apparent supplanting of General Studies and Critical Thinking which has led to the policy decision to abolish both A levels. This two-way enactment/interaction process between policy and learning programme is worth further investigation in the case study centres featured in this research.

An important matter for consideration in Chapter 1 was why Ball *et al* (2012) had chosen to use the term policy ‘enactment’ in preference to ‘implementation’ for the process described above. In similar vein, it might also be contended that the process could be named ‘mediation’ in place of, or as well as, the term ‘enactment’. In this respect, it is interesting to consider the views of Pollard *et al* (1994: 156), cited by Broadfoot & Pollard, who argued that:

‘...schools, as well as teachers and pupils, are embedded in a dynamic network of personal identities, values and understandings’ [that] ‘...are constantly developing in the light of internal and external interaction, pressure and constraints...’ (in Filer, 2000: 18).

As Broadfoot & Pollard (2000), writing in Filer, go on to observe:

‘Because of these dynamics, policy directives are translated into classroom practice through a series of ‘mediations’. That is, at each successive stage of the process of delivering education, actors are involved in a process of creative reinterpretation.’ (ibid: 18)

Not only does this analysis of what they suggest to be a ‘mediation’ process involve interpretation and translation – for Ball *et al* (2012), the *situated decoding* and *recoding* of enactment – but it also mentions the involvement of ‘actors’ and, by implication, the impact and influence upon them of ‘contextual dimensions’. Elsewhere, the same authors make reference to:

‘...the role of educational practitioners in responding to and mediating educational policy, so that the impact may differ from that originally intended ... such mediation is not only possible but inevitable.’
(Pollard *et al*, 1994: 25)

However, when Broadfoot & Pollard’s use of the term is compared with the way in which Ball and his colleagues use it, a distinct difference emerges. For Broadfoot & Pollard, mediation would appear to be used *in place of* ‘enactment’ – meaning more or less the same as the latter term does for Ball *et al*; whereas, for Ball *et al*, mediation is seen *as part of* the enactment process rather than the whole. For example, when discussing the social construction of policy enactments, Maguire *et al* (2015) refer to:

‘...the localised nature of policy actions, that is the adjustments and accommodations and conflicts which inflect and mediate policy;’
(ibid: 488)

Further on, they also observe how certain aspects of different policy actors’ loyalties and personal and professional values can be: ‘...mediated by their positionality in school’ (ibid: 497). Similarly, Braun *et al* (2011) use the term to suggest the impact of contextual dimensions on the interpretation/translation elements of enactment:

‘Furthermore, what happens inside a school in terms of how policies are interpreted and enacted will be mediated by institutionally determined factors...’ (ibid: 586)

Thus, it would seem that enactment is considered to be a more appropriate term because it encompasses all the various ways in which an ‘actor’ may act and interact with policy/learning programmes, and with the contextual dimensions in which they are situated, whereas mediation is better used to describe certain interventions that may take place as part of the enactment process, thereby impacting on the very process itself. Proof of this preferred stance is further provided in the same article when Braun *et al* discuss the extent to which policies ‘fit’ with the ethos and culture of a school:

‘That is, enactment is also mediated by what Riseborough (1992) has termed ‘secondary adjustments’, in that policies can be either ‘contained’ or ‘disruptive’ in schools.’ (ibid: 586)

On the basis of this evidence, it is clear that the process known as policy enactment is one within which mediation may take place, and that the same principle should pertain to EPQ learning programme enactment.

- 2.3.2 Contextual dimensions

'Schools produce, to some extent, their own 'take' on a policy, drawing on aspects of their culture or ethos, as well as on situated necessities (Braun, Maguire & Ball, 2010) within the limitations and possibilities of context(s).' (Braun, Ball, Maguire & Hoskins, 2011: 586)

As previously discussed, the primary aim of this case study is to determine factors generating successful enactment with regard to the EPQ. The enactment process itself, as defined by Ball *et al* (2012), has been adapted to form a conceptual framework for this research (Appendix B) which in turn: '...will need to consider a set of objective conditions in relation to a set of subjective 'interpretational' dynamics' (Braun *et al*, 2011: 588; Ball *et al*: 21). In other words, in order to make better sense of the enactment process at institutional level, it is essential to take account of, and explore, what the authors define as the 'dynamics of context and their interrelationships' (see also Lingard & Sellar, 2013). This is equally important in the case of learning programme enactment as it is for policy enactment – a centre's members cannot 'enact' the EPQ in isolation but will continuously be influenced by and draw on aspects of its culture and ethos, together with the values and experiences of those participating in and contributing to the learning programme, both consciously and unconsciously. Factors generating successful EPQ enactment, therefore, may well be found embedded within these contexts – material, structural and relational. However, I would argue that what really matters is not so much the contexts themselves but the way in which they are viewed by the centre, its communities and its individual members; also, how they decide to utilise them – their limitations and possibilities – as part of interpreting and translating the learning programme. These steps and how they are taken, I would suggest, are crucial to generating successful enactment.

Ball *et al* propose that the diverse range of contexts likely to be encountered in most settings may be logically grouped under four conceptual headings or 'contextual dimensions': *situated, professional, material* and *external* (2012: 21; 2011: 588). However, they warn that these aspects can overlap and are interconnected. For example:

'...school intake is presented as 'situated', but intake in turn can shape professional factors such as values, teacher commitments and experiences...' (Braun *et al*, 2011: 588)

They explain the character of each dimension in the following ways, which have been amended where necessary to better reflect the circumstances relating to learning programme enactment in post-16 settings such as a sixth form college:

- **Situated contexts** – such as locale, the centre's histories and purpose, the communities it supports and interacts with, and its student intakes. Ball *et al* maintain that an institution such as a school or college develops its own 'institutional narrative' or articulated self-perception (2012: 23) and observe that: '...context is an 'active' force, it is not just a backdrop against which schools have to operate' (ibid: 24). Their observations on 'situated contexts' stress the importance of monitoring how centre informants refer to themselves and to their student intake, in order to pick up on possible stereotyping, for example. They also note the necessity to consider what might be the result of informants' self-perceptions.
- **Professional cultures** – such as centre cultures, values and ethos as portrayed in policies, practices, procedures and priorities, including the prevalent leadership style, teacher/tutor commitments and experiences, and curriculum/EPQ qualification/line management practices. For Ball *et al*, these contexts are somewhat less tangible than those categorised under 'situated contexts'. They are about values, ethos and cultural practices and

traditions, and whether and how they can be seen to shape enactments (ibid: 26). However, they prefer to focus on the impact of leadership under 'policy actors' rather than 'contextual dimensions' even though other policy theorists such as Spillane (2004) place great emphasis on the role of leadership and its effects. I have tended to agree with Spillane in this respect and view leadership as highly relevant and essential for consideration in both domains. Moreover, for the purposes of this study, I would also point out that the use made of 'student voice' strategies is a notable aspect of professional culture and practice within centres.

- **Material contexts** – such as staffing and other human resource opportunities, budget, buildings, technology and infrastructure. In this category, Ball *et al* focus on what they call the 'physical' aspects of an institution (ibid: 29). They take into consideration the possible effects of its quality and layout, together with the resources it contains, on policy enactment. With respect to EPQ enactment – or the enactment of any learning programme – the context in which it takes place is bound to be of tremendous importance, not only with regard to the type of teaching and learning that can take place as a result, but also to sustaining the motivation and commitment of staff and students throughout the course. For example, where the EPQ is concerned, there is particular need to locate timetabled lessons in rooms with sufficient computers, and as far as possible, to provide easy, unlimited access to internet-based research systems, both on and off campus (especially important over the summer holidays); also, the opportunity to link staff and students through VLEs (virtual learning environments) and centre-based intranet systems is a powerful means of improving communication between lessons. Similarly, EPQ Presentation Events can be high-status, creative events which enhance a centre's reputation both internally and externally – but how they are run

must inevitably depend on the material resources, including time, funding and staffing, available to the centre's EPQ Coordinator.

Ball *et al* make a number of valuable observations regarding the impact of material contexts. For example: 'Staffing is of course not just a cost; the staff are, in the first – and last – instance, a school's main asset...' (2012: 35). In terms of the EPQ, the programme clearly depends on the quality, quantity and availability of individuals and (often) the willingness of their departments to release them for contributing to the EPQ. Moreover, as has already been mentioned, the range, accessibility, quantity and quality of ICT equipment available is also crucial, but so is the level of staff expertise and their willingness to use the technology with their students. Lastly, in terms of material aspects, there is the issue of how much the SLT are prepared to invest in the EPQ – which clearly interconnects with 'professional cultures', values and commitments.

- **External contexts** – such as the degree and quality of exam board support; pressures and expectations from parents, Ofsted ratings, the need to maintain a centre's reputation locally and regionally (Area Reviews), and with regard to its national standing amongst sixth form colleges; legal requirements and responsibilities; qualifications and curriculum policy reform. For Ball *et al*, the emphasis here is on: '...aspects such as pressures and expectations generated by *wider* local and national policy frameworks...' (ibid: 36) whereas, for the EPQ and this research, this aspect raises a number of questions regarding all three case study centres. For example, to what extent do they use the EPQ as a vehicle for marketing their institution? How do they use it, if at all, as a means of competing with rival sixth form providers in their area? Do they use it to impress Ofsted, and/or to reinforce links with HE, and employers – and if so, in what ways? One common practice all three centres share is an ongoing relationship

with their selected awarding body for the EPQ. However, how intense is this relationship and how does interaction take place? Moreover, to what extent can the three centres be seen to be operating with their awarding body in a climate of 'earned autonomy' (ibid: 39)? This term, as Ball *et al* explain, represents a situation whereby a centre is mainly left to its own devices because of their successful enactment in the past and consistently good results, as well as the length of time they've run the programme.

Although these four categories appear to capture the key contexts likely to have a profound impact or influence on policy enactment, are they all in fact as relevant to EPQ enactment, and can they be truly said to cover all the contexts which have a relationship with learning programme enactment? From my direct experience of the EPQ, reinforced by the case study fieldwork undertaken for this study, I would suggest that the four categories *are* of equal relevance, but that one particular group of aspects – 'teaching and learning approaches' – may merit greater attention with regard to their influence on learning programme enactment than on policy enactment. No doubt it could be argued that teaching and learning contexts are implicitly covered in 'situated contexts' and 'professional cultures' – though they are not explicitly included in either category by Ball *et al*. However, in light of the inevitable influence and impact of teaching and learning practices and experiences on both staff *and student* interactions with, and perceptions of, the EPQ, I propose that, in the context of this study, it should be treated as a type of fifth, distinct category which is overlapping and interconnected with the two aforementioned categories:

- **Teaching and learning approaches** – past, current and emerging institutional styles, practices and priorities to which staff and students are constantly exposed, with which they are continuously interacting, and through which they are consequently likely to interpret, translate and

‘operate’ the EPQ learning programme; to include assessment styles and approaches. This category reflects Lave and Wenger’s (1991) theory of situated learning and their observation that: ‘...the context in which learning takes place is integral to what is learned’ (in QCA, 2008b: 14).

In all, Ball *et al* suggest that every ‘holistic’ context – an institution – must be unique because no two will have the same mixture of components in terms of contextual dimensions. They are constantly shifting and dynamic, both within and outside. With regard to EPQ enactment, this can be witnessed in the changing student cohorts who bring different experiences, skills and attitudes to the programme, and therefore may view it differently to their predecessors; similarly, staffing changes constantly. Sometimes this is for the good, with new skills and pedagogical approaches emerging, as well as particular aptitudes for mentoring and collaborative working, but sometimes it can make for difficulties with regard to maintaining continuity and training, especially where programmes run across Y12 to Y13. Moreover, Ball *et al* refer to the ‘affective dimensions’ of colleagues’ commitment to each other which represents the ‘emotional capital’ that helps one weather the storm. This can vary greatly and can be affected by other internal and external factors, leading to an impact on the way the EPQ is enacted and, potentially, on the impression gained by students participating in the course.

Braun *et al*’s theory is reminiscent of Wenger’s (1999) ‘constellations of practices’ (2008: 126-7) in that the range of contexts identified within Ball *et al*’s four dimensions may also be seen as reasons whereby different communities of practice such as awarding bodies, EPQ supervisors, learning centre staff and EPQ candidates may be seen as:

‘...forming a constellation, by the people involved or by an observer ... All these relations can create continuities that define broader configurations than a single community of practice’ (ibid.)

For Wenger, a constellation is: ‘...a particular way of seeing them [*communities of practice*] as related, one that depends on the perspective one adopts’ (ibid.). Even though they may be located in different centres and organisations, common contextual aspects may unite them and thereby help to develop a sense of shared identity for the communities involved and for the individuals within them. It is also worth noting that certain individuals may belong to more than one community of practice; for example, a number of senior managers in the case study centres for this research, including a college Principal, are also EPQ supervisors. Of the nine ‘aspects’ Wenger suggests, five stand out as potentially holding particularly significance and/or relevance in the case of those involved in EPQ enactment, whether as stakeholders, contributors or participants:

- sharing historical roots
- having related enterprises
- facing similar conditions
- having overlapping styles or discourses
- competing for the same resources.

Nevertheless, perhaps a note of caution should be added in that, when observing and interpreting the impact of various contextual aspects in the course of research for this study, it would be wise to bear in mind the requirements of causal explanation, as presented by Lofland *et al* (2006: 157-8). In particular, that variables: ‘...*should be ordered temporally*, such that the presumed cause precedes the effect in time...’ and that one must avoid making assumptions about what is actually causing a particular effect, not jumping to conclusions but remembering that:

‘Some other unknown factor, or some known but unmeasured factor, may be the cause or among the causes’ (ibid: 157).

- 2.3.3 EPQ learning programme 'actors'

'Actors in schools are positioned differently and take up different positions in relation to policy, including positions of indifference or avoidance or irrelevance.' (Ball, Maguire, Braun & Hoskins, 2011: 625)

Having deliberated over what is meant by 'contextual dimensions', the many different contextual aspects they contain and their relevance to EPQ enactment, I will conclude Chapter 2 by briefly reviewing the typology of 'actor' roles and positions suggested by Ball *et al* as a result of their investigations into the ways in which teachers engage with policy (2011; 2012). In addition, consideration will be given to the importance of leadership and power within the context of enactment. The purpose of so doing, as in the case of contextual dimensions, is to determine the extent to which the typology for policy enactment may be successfully applied to the diverse range of 'actors' engaged in learning programme enactment and how leadership and power may also impinge on the process. However, one key difference is evident from the outset between the actors involved in policy enactment and those involved with the EPQ. That is, whereas Ball *et al* only consider teacher/adult actors in their writing on policy, in the case of EPQ learning programme enactment, student 'actors' also have a major part to play, and assume varying roles and positions in the process.

In presenting their typology of eight types of policy actor or 'policy positions', Ball *et al* acknowledge the influence of writers such as Law (2008), Timmermans & Berg (1997) and Fenwick & Edwards (2010) who have expounded the notion of actor-network theory (ANT). They mention the influence on their thinking of Law's warning that: '...there are no orders, but always 'ordering' and therefore always precariousness...' (2012: 16) but also point out that they do not fully subscribe to ANT 'by any means'. Reference is also made (ibid: 8) to the work of other theorists whose thinking has guided

their selection of actor types and roles involved in the processes of interpretation and translation (for example: Mintron, 1997; Coburn, 2005; Colebatch, 2002). Most importantly, they make clear that the inherent 'seductive neatness' of their typology may be misleading or misrepresent the 'real' situation and should therefore be treated with care. As they observe:

'These 'actor' categories or positions are not necessarily attached to specific individuals, nor are they fixed, unified and mutually exclusive 'types' of teacher/adult in every case. Some people may move between these roles ... or may combine different aspects of policy work in their interactions with colleagues.' (Ball *et al*, 2012: 49-50)

Ball *et al*'s proposed set of eight types of actor and the forms of policy position each represents are as follows (ibid: 49):

- **Narrators** – interpreting, selecting and enforcing meanings
- **Entrepreneurs** – practising advocacy, creativity and integration
- **Outsiders** – entrepreneurship, partnership and monitoring
- **Transactors** – accounting, reporting, monitoring/supporting, facilitating
- **Enthusiasts** – focus on investment, creativity, satisfaction and career
- **Translators** – producing texts, artefacts and events
- **Critics** – for policy purposes, management-monitoring, counter-discourses
- **Receivers** – coping, defending and dependency.

Based on my observations and experiences of EPQ enactment, both prior to the fieldwork for this study and during the collection of data from case study centres, I would suggest that these eight 'actor' types are eminently transferable to the learning programme enactment process and are particularly helpful in drawing out some of the less-obvious actions in which individuals/communities of practice may be engaged. Appendix D provides a 'snapshot' of how the typology might apply to EPQ enactment and includes

some suggestions as to the key players most likely to be found engaging in the various forms of action. For example:

- **Principals/SLT** – act as narrators through actions of leadership, interpretation and prioritisation; also, as transactors through accounting, reporting, making value-based decisions, allocating budgets (resource and staffing), facilitating, monitoring and supporting; they can also be/become enthusiasts or critics, depending on the quality of EPQ programme delivery or the level of closeness with which they are associated with the course in their own centre;
- **Lead EPQ Coordinators** – act as entrepreneurs through actions of advocacy, interpretation and translation, change agency, originality and creativity, staff and student recruitment; also, as transactors in the same vein as SLT and undoubtedly as enthusiasts for the EPQ by using creative means to promote the qualification, recruit and retain students/staff, train new supervisors, and invest time in meaning-making, particularly for parents; working in collaboration with their supervisors, they also act as translators in leading on and producing texts, artefacts and events such as the Presentation Event, training and standardisation sessions; less experienced lead Coordinators may also begin as receivers, being compliant, less creative interpreters and translators, reliant on texts and guidance ‘as given’;
- **EPQ supervisors** – act as enthusiasts for the EPQ through their work as interpreters, activists, inspirers and recruiters of students and of other supervisors; they also play a major role as translators, alongside their lead EPQ Coordinator, promoting collective enactment, collaboration and cooperation in the translation of text such as specifications (externally sourced) and ‘taught element’ lesson plans (internally sourced) into learning and teaching activities; they can also act as critics in a similar vein to students, commenting on the effect of demands on them resulting from

the EPQ, the quality of centre resources/facilities, lack of understanding as to their supervisory role or the level of support they receive, for example; finally, as in the case of some Lead Coordinators, less experienced EPQ supervisors can also act as receivers;

- **Students** – act as enthusiasts for the EPQ, and also as translators, often alongside their supervisors; they can also be critics, however, interpreting, observing and commenting on EPQ impact issues such as increased pressure of other A level work, forms of teaching/learning, monitoring and assessment procedures (but this can be put to good use if harnessed through student voice activities, for example);
- **External partners** – act as outsiders through being ‘interpreters of interpretations’ (Rizvi & Kemmis, 1987), and translators in partnership with teachers and students (and other partners), and actions of monitoring and evaluating; some may also act as transactors on occasions, and awarding bodies certainly take on the role of translators, sending materials, EPQ specifications and information into centres based on their interpretation of Ofqual criteria; many also perform as enthusiasts for the EPQ but others, including parents, may on occasions be critics, both of the qualification and/or of its actors.

- **Leaders and leadership**

As outlined above, the concept of ‘leaders and leadership’ undoubtedly figures strongly both in terms of its contribution as a contextual factor, influencing and being influenced by different degrees and types of interaction with the EPQ, and as a key component within the framework of actors engaged in varying ways and levels in the process of learning programme enactment. Significantly, Pashiardis & Johansson point out that school leadership: ‘...has been gaining growing attention from educational policy makers, as research

evidence indicates that the principal's role is crucial for improving students' academic achievement...' (2016: 1). No doubt this observation stands as true for Principals of FE/Sixth Form Colleges as it does for schools, particularly in cases where the Principal's leadership style is deliberately 'hands-on' regarding their level of involvement in curriculum management and delivery issues and/or where they personally participate in activities such as EPQ supervision, for example. As Pashiardis & Johanssohn also observe, some school leaders have moved away from dealing primarily with 'bureaucratic functions' to '...an increasing repertoire of roles and responsibilities, such as being the pedagogical or the entrepreneurial leader of the school...' (ibid: 2), a situation that can also be identified in post-16 educational settings, including some of the case study centres for this research.

When considering effective leadership, the authors discuss the benefits of the Pashiardis-Brauckmann Holistic Leadership Framework (2008) in which 'leadership' is perceived as 'a multi-level and multidimensional construct which may affect school and student variables but is also likely to be influenced by contextual variables (Pashiardis, 2014)' (Pashiardis & Johanssohn, 2016: 6). Central to this Framework is what they term the 'leadership radius' or: 'action area of the school leader, as the central figure within the school' (ibid.). This, they go on to explain, is manifested through school leaders implementing five distinct but overlapping styles of leadership as they perform their leadership duties:

- an instructional style
- a structuring style
- a participative style
- an entrepreneurial style; and
- a personnel development style.

In order to develop some form of logical structure within which to observe the leadership styles, attitudes and operational practices of case study centre informants during the course of this study, it would seem appropriate to apply some of the basic tenets of the Pashiardis-Brauckmann model, even though this research focuses on aspects of leadership in sixth form colleges rather than schools. It is true to say that college Principals are bound to be contending with far larger student cohorts and staffing numbers, and that the role they play may at times be closer to that of a Chief Executive in some respects (although this has also become increasingly common in many schools, for example, in Academies). Nevertheless, the ability to operate as an 'effective leader' in an educational setting such as a school or college, must surely depend on adopting and maintaining a balance in the implementation of the same set of five fundamental styles. In addition, it may well in turn form the basis of the leadership style promoted throughout a centre, and consequently practised at other levels such as by the lead EPQ Coordinator in relation to their team of supervisors.

Connecting leadership with Ball *et al.*'s concept of contextual dimensions, it is interesting to note Pashiardis & Johansohn's comment that:

'...leaders do not operate in a vacuum ... their actions greatly depend on their perceptions of the particular context in which they operate (Bredeson *et al.*, 2011). Moreover, school leaders' actions are influenced by context and, at the same time, they try to influence context to their benefit.' (2016: 7)

They argue that leadership is both dependent on, and limited by, a leader's perceptions of their immediate surroundings, and that they strive to shape the context in which they practise: '...so that the teachers who work there can then ideally be more effective in supporting their pupils in order to achieve better learning outcomes' (ibid: 8). Their perspective clearly mirrors the notion

of 'leadership for learning' which, according to Collinson (2007), can be exemplified in the UK tertiary sector by the increased emphasis placed on taking account of student voice in leadership and management processes in order to encourage learners' greater engagement and proactivity (Rhodes & Brundrett, in Bush *et al*, 2010: 154). Pashiardis *et al* (in Pashiardis & Johanssohn, 2016) set out some of the key characteristics of successful and effective school leaders which, again, points to the fundamental priority of leadership being the students and their learning (see also Leithwood *et al*, 2006):

'[they] ...are contextually literate, have a deep knowledge and understanding of their school's demographic situation, and they act accordingly in order to meet their students' needs.'

(Pashiardis *et al*, 2016: 205-6)

Further on in their deliberations on successful school leadership models, two types of leadership are considered in detail, both of which reflect a co-constructivist approach in that they both encourage institutions to work on a 'top-down' and 'bottom-up' basis in order to achieve improvement. In this way, for Rhodes & Brundrett, they are forms of leadership that:

'...accentuate collaboration and distribution of power and authority [which] are themselves central to learning (Burton & Brundrett, 2005).'

(Rhodes & Brundrett, 2010: 155)

Rhodes & Brundrett suggest that a co-constructivist approach to leadership can help to develop staff members who: '...cooperate, negotiate, resolve differences, mediate between options, and generally act in a socially skilled manner to reach decisions that will enhance student learning' (ibid.) and thus enables an institution to become 'learning-centred'; in other words, a school or college in which leadership for learning is paramount is one where student and staff learning stands at the core, resulting in a 'learning community' that:

'...endeavours to change, improve and further support student learning outcomes' (ibid: 157).

Clearly, with regard to centres in which the EPQ learning programme is enacted, it would seem that such 'leadership for learning' styles may offer particular benefits, depending on how and why a leader decides to adopt the associated techniques. Two forms are of particular note in this respect, although there are others of similar worth: firstly, instructional or pedagogical leadership, and secondly, distributed leadership. **Instructional leadership** has its roots in the USA where, as noted by Rhodes & Brundrett, Blase & Blase (2004) advocated that:

'...successful instructional leaders talk to teachers about their instruction, encourage collaboration between teachers and empower teachers to foster decision-making, professional growth, teacher leadership, status, autonomy, impact and self-efficacy.' (2010: 157)

Pashiardis *et al* describe this style as one in which a Principal assumes the role of 'leader of leaders'. It is deemed particularly important for enhancing student performance, albeit in mostly indirect ways, and is to do with interventions such as:

'... defining instructional objectives, setting high expectations, monitoring and evaluating students and teachers, enabling achievement of instructional objectives, stimulating instructional innovation and carrying out pedagogical dialogues with teachers about the quality of their teaching and the kind of expectations that school leaders have of their teachers, become their everyday commitment.' (Pashiardis *et al*, 2016: 206)

The hoped-for impact on teachers exposed to this 'instructional leadership' style is that they become more self-reflective, more innovative and creative,

engage in increased levels of risk-taking, demonstrate higher levels of motivation and satisfaction, sense of security and self-efficacy – in fact, many of the desired outcomes for students from participating in the EPQ. Thus, instructional leadership appears to be one that can offer distinct advantages for promoting successful EPQ enactment in that it has the potential to develop positive role models (EPQ supervisors) displaying many of the qualities that EPQ candidates hope/need to develop. I would argue that participation in the programme alone can only provide the *opportunities* for independent and autonomous learning, and for demonstrating leadership skills. The level of student responsiveness to these opportunities and the quality of their actions depends to a great degree on how much they are exposed to role models – whether they be senior managers, EPQ supervisors or even external partners, for example – promoting and practising these skills and attitudes within and around their learning context.

With regard to the second notable leadership style, **distributed leadership**, Pashiardis *et al* describe this leadership form as a practice in which Principals are engaged in building what they describe as ‘collaborative structures’, both within and outside their own institutions. Within, their objectives are to empower their staff and, particularly importantly, their SLT, and to embrace the practice of shared decision-making. With its strong emphasis on the imperative of developing: ‘...positive and productive relationships among school participants based on trust and mutual support...’ (ibid: 206), this again can be seen as potentially beneficial with regard to strengthening, supporting and sustaining effective EPQ enactment. Moreover, as Principals pursue their entrepreneurial goals of building collaborative structures and alliances between the centre and its external partners, including parents, they in turn can act as powerful role models for other leaders such as lead EPQ Coordinators and students, perhaps encouraging them to make better use of HE partners and employers, for example, to enhance their EPQ experience.

- **Issues of power**

To what extent is the successful enactment of a learning programme dependent on the balance of power in an institution – and outside it? As indicated above, the impact of external contexts can be just as profound as the factors prevailing within an institution, especially as they may well be beyond the control of the internal ‘actors’. Moreover, the vagaries of political thinking and changes of government have many times resulted in both positive and negative (or at least ‘challenging’) reforms being instigated that have subsequently altered the fortunes of post-16 education and qualifications, including the EPQ (see Section 2.1). Some of these changes may have been planned but others have been clearly unforeseen in terms of the effect they have ultimately had on centres’ enactment of the qualification, as for example when 14-19 Diplomas were withdrawn. For Bell & Stevenson (2015), the balance of power – and who holds it – is a key influencing factor when considering the mechanisms by which educational decisions are made, both internally and externally. They point out that it is not only to do with power wielded by internal ‘actors’ – including students – but also external players who might have a say in any decision-making and therefore hold a certain element of power:

‘What is the balance of power between the government minister and the classroom teacher, and who else might have a say in that decision – business, the community, parents...?’ (ibid: 146)

They point out that there abides a distinct difference between the politics *of* education and the politics *in* education which constantly underpin those ideologies: ‘...which frame most of what happens in individual educational institutions...’ (ibid: 147). The politics *of* education is understood as that which tends to originate primarily from external sources – information, opinions and perceptions ‘brought into’ an institution - whereas the politics *in* education is

seen to be the 'mobilization of power' constantly being played out within the institution itself. It is clear, therefore, that both types of politics will and must have a fundamental effect on the way in which a programme such as the EPQ continues to be interpreted, re-interpreted and translated as part of the overall enactment process. Both types can be the cause of conflict and agreement between the various actors, and both are the source of decisions as to whether, how and why the programme should be incorporated into the existing post-16 curriculum offer, whether it should continue to be offered or not – and enacted by whom and for whom. Both will play a part in determining the range of resources, staffing and timetabled time allocated to the specific learning programme as it competes with other programmes, and will consequently influence the way that EPQ-related teaching and learning takes place. Thus, the balance of power – both externally and internally – underpins not only the enactment process and how it is acted out, but also the contextual dimensions surrounding it and impacting on it, and the actors responsible for interacting with it.

Finally, and again drawing together both the notion of 'contextual dimensions' and the concept of enactment 'actors', it is worth considering the views of Pollard *et al* when reflecting on the implementation of change. Although focused on school management, they would apply equally well to post-16 educational settings:

'The nature and effect of values at school level are clearly related to the culture of the school, which, in turn, is a reflection of the beliefs and actions of the head and individual teachers...' (1994: 26)

Chapter 3: Methodology

3.1 Introduction

The fundamental aim of this thesis is to examine a specific post-16 learning programme, the EPQ, with a view to determining what might be considered as key factors helping to generate its successful enactment. Through in-depth scrutiny of the ways in which three different sixth form centres approach EPQ enactment, taking into account the range and diversity of contextual dimensions in each setting, and how – and why – the various actors/enactors within them interact with the learning programme, with the contextual dimensions and with each other in particular ways, it is intended to address the issues posed in my three main research questions:

1. *Why do some post-16 institutions appear to be more successful than others in delivering and sustaining the EPQ as part of their post-16 curriculum provision?*
2. *What was the EPQ's intended purpose and how, if at all, has this altered over time?*
3. *How has planned change (namely, the introduction of the EPQ) led to unplanned change over time?*

In the previous chapter, a review of relevant literature and educational policy documents has sought to shed light on the EPQ's origins and development, and has further explored some of the essential components of Ball *et al*'s enactment process and how these have been applied to the subject of this research, namely, the EPQ learning programme. However, in order to fully understand the processes, practices and underlying perceptions and opinions of those involved in EPQ enactment, it is also necessary to conduct case study

research into the phenomenon, to witness it being played out within its natural setting.

The purpose of this chapter, therefore, is firstly to set out the theoretical and epistemological perspectives underlying the strategic approach I have taken to designing this primarily qualitative piece of research. I then discuss the nature and application of the two methodological 'strategies of inquiry' (Creswell, 2003), or 'major genres' of qualitative, interpretive approaches (Marshall & Rossman, 2011), selected to inform the research – specifically, case study and constructivist grounded theory – and the range of associated research methods used for data collection and analysis. Links are made with piloting activities undertaken in preparation for the main body of research, and relevant issues, together with decisions made, regarding validity, reliability and ethical considerations are also discussed. Further clarification is provided regarding the conceptual framework underpinning my research, as are detailed descriptions of the sample of sixth form centres involved in the case study. Finally, my approach to data coding and analysis is explained in relation to constructivist grounded theory methodology, and an analytical framework of conceptual themes and focused codes is introduced. The framework creates a logical structure within which to locate the research findings to be presented in Chapter 4.

3.2 Research methodology

The primarily qualitative methodological approach I have taken to this research is influenced by my tendency to favour a more subjectivist (anti- or post-positivist) viewpoint as opposed to that taken by investigators of a more objectivist (positivist) persuasion (Burrell & Morgan, 1979). In effect, I perceive the social world and the nature of social science as being: 'of a much more personal and humanly created kind...' and as a result, my research objectives

have been focused on gaining understanding of how and why individuals and social groups associated with EPQ enactment in a variety of ways, 'create, modify and interpret the world in which they find themselves' (Cohen *et al*, 2018: 6). For Burrell & Morgan, the subjectivist approach is based on *nominalist* ontology; that is, relating to the philosophical doctrine that: '...general or abstract words do not stand for objectively existing entities and that universals are no more than names assigned to them' (Dictionary.com definition), in which it follows that objects labelled with the same term have only their name in common. Further, Burrell & Morgan describe methodology pertaining to the subjectivist view as *idiographic* in that it concerns the study or explanation of individual cases or events, as in a case study. Their assertion that the intention behind such an approach is to explain and understand: '...the unique and the particular individual cases ... rather than the general and the universal...' (Cohen *et al*: 6), clearly resonates with my own aims in conducting the investigation presented here and, as discussed later on, with my supposition that taking a practical approach to reflexivity can make a positive contribution to research of this nature.

As Cohen *et al* affirm, paradigms do not necessarily drive research: '...as research is driven by the purposes of the research' (ibid: 9). They are there to help clarify and organize one's thinking about the research, its purpose, design and the most appropriate methods to be used for data collection and analysis, and this most certainly describes my experience. My approach has been further guided by my preference for pursuing an **interpretive-constructivist** approach regarding the ways in which I have sought knowledge during the course of my investigations. As a paradigm (that being a 'world view' or accepted way of looking at or researching phenomena), the **interpretive** approach to research is often treated generically (Cohen *et al*; Lukenchuk , 2013; Lather, 2004; Gray, 2004; Gill & Johnson, 2010) to include stances such as hermeneutics, phenomenology, ethnography and symbolic interactionism.

In contrast to its normative counterpart, the common denominator in each interpretive case is the researcher's 'concern for the individual' and the need to understand 'the subjective world of human experience ... from within' (Cohen *et al*: 19). Thus, interpretivists strive to understand and make meaning of the actions they encounter through their research but, in order to do so, they need to ascertain the intentions of the actors/participants with whom they are involved through sharing their experiences and interacting with them. Moreover, they must:

'...suspend or forgo their own assumptions about people, cultures and contexts in favour of looking at a situation and its context in its own terms ... to investigate the interpretations of the situation made by the participants themselves, to understand their attitudes, behaviours and interactions.' (ibid: 20)

Social constructivism (or constructionism) is a world view often closely aligned to the interpretive paradigm (Mertens, 1998). It proposes that:

'...people actively and agentially seek out, select and construct their own views, worlds and learning, and these processes are rooted in socio-cultural contexts and interactions.' (Cohen *et al*, 2018: 23)

In other words, individuals do not respond passively to the external objects, factors and contexts surrounding them, but develop subjective meanings as they engage with the world they are interpreting (Crotty, 1998). These meanings are varied and represent multiple perspectives and realities, having been formed – socially constructed – through people's interactions with each other: '...and through historical and cultural norms that operate in individuals' lives' (Creswell, 2003: 8; Pring, 2004: 50-51). Hartas argues that, by drawing upon constructivist thinking, educational research: '...strives to empower participants' perspectives and ideas, and obtain rich descriptions of the contexts that surround their lives' (2010: 44), an assertion that succinctly

captures the aims underpinning my own research. I have focused on studying the processes (Hammersley, 2013) and contexts affecting a sample of actors involved in the EPQ learning programme, examining the EPQ enactment situation through them, as ‘multiple lenses’, with a view to better understanding what *they* understand – and why they act as they do. I am aware that there may be limitations inherent in taking an interpretive, qualitative path as, for example, in how one can ensure the reliability and accuracy of data collected via subjective, semi-structured interviews (Argyle, 1978), an issue discussed further in Section 3.9. I also recognise the dangers implicit in Bernstein’s (1974) concern that: ‘...the very process whereby one interprets and defines a situation is itself a product of the circumstances in which one is placed’ (Cohen *et al*: 24). It is essential, therefore to maintain a pragmatic and open view, always remembering that there is more than one way of interpreting the phenomenon at issue.

3.3 Research design: strategies of inquiry

My interpretive-constructivist methodological perspective, as explained above, has profoundly influenced my thinking with regard to selecting fit-for-purpose strategies of inquiry (Creswell, 2003) that can help sustain both direction and focus within my overall research design and guide my choice of techniques for data collection and analysis. Consequently, I have firstly chosen to adopt a qualitative case study approach which harmonizes with my primary need to interpret and understand EPQ enactment through studying and interpreting its enactors’ distinctive and context-laden viewpoints (Hitchcock & Hughes, 1995: 316). Secondly, I have chosen to apply some of the key principles and methods associated with the constructivist model of grounded theory, as propounded by Kathy Charmaz (2000; 2002; 2006; 2014), as this approach has enabled me, in the course of my investigations, to acknowledge: ‘...subjectivity and the

researcher's involvement in the construction and interpretation of data...' (Charmaz, 2014: 14), and yet at the same time to remain true to a fundamental tenet of interpretive research – that: '...theory is emergent and arises from particular situations; it is 'grounded' in data generated by the research (Glaser & Strauss, 1967)' (Cohen *et al*, 2018: 715). It is important to reiterate that the purpose of my research has not been to answer my research questions through the testing or verifying of any existing theories or hypotheses. Rather, its purpose has been to gain theoretical understanding of perhaps a more abstract than explanatory nature, through interpretation of emergent data relating to the studied phenomenon (Charmaz, 2014: 230).

- 3.3.1 Case study approach

The definition of 'case study' as propounded by Yin (2018: 15) suggests that this strategy of inquiry is particularly relevant to my research aspirations. For example, with regard to its scope, Yin suggests that, as an empirical method, case study can be used to investigate:

- '...a contemporary phenomenon (the "case") in depth and within its real-world context, especially when
- the boundaries between phenomenon and context may not be clearly evident.' (ibid: 15)

Moreover, although the aims and structure of my research are not chiefly concerned with producing widely generalizable findings – not least because its relatively small scale in terms of sample may in itself restrict generalizability – using a case study format can still have certain advantages in this respect. As Yin observes, at least in terms of *analytic* generalization, it can offer opportunities – as an 'exploratory' case study – for shedding empirical light on theoretical concepts and lessons learned, with a view to defining further

research possibilities on a wider scale or to informing EPQ enactment practice in other contexts and settings.

The model of case study employed for this research most closely aligns with the comparative, or multiple case study design described by Gray (2006: 132; see also Yin, 2018: 48), in that a comparative investigation into the possible key factors determining successful EPQ enactment was conducted, involving scrutiny of three different “cases” or approaches to enactment in three sixth form centres. In order to achieve the aims of this study, the same set of key topics pertaining to the learning programme was examined within each of the three participating centres via the same methods and instruments. The topics deemed most essential included:

- perspectives and experiences of EPQ stakeholders, contributors and participants
- actions and interactions of the various EPQ ‘actors/enactors’
- contextual dimensions and how these may impact on EPQ enactment
- EPQ operational practices and procedures and the rationale behind them.

- 3.3.2 Research design: Tiers 1 and 2

Alongside the case study research – what might be termed the Tier 1 body of research – has been a second, interrelated Tier (Tier 2). This has consisted of an ongoing, broad investigation of the EPQ and its background, using a variety of sources such as:

- scrutiny of relevant empirical and conceptual literature, together with statistical data reports outlining longitudinal EPQ trends and developments (such as student uptake);

- informal exploratory discussions with policy makers and contributors to the shaping of the EPQ, including: key contributors to the Tomlinson Report (DfES, 2004a); EPQ Lead Examiners for awarding bodies; previous employees of QCA responsible for the EPQ pilot phase evaluation and commissioning of contracts for EPQ teacher guidance materials; EPQ practitioners representing institutions other than the case study centres;
- comparative examination of awarding body resources, including EPQ specifications, practice exemplars, examiners' reports and support materials provided for EPQ centres.

In part, Tier 2 background research has been undertaken in preparation for the Literature Review and also relates to the research methods (particularly interviews and documentary analysis) adopted for data collection within Tier 1 (see Section 3.6). However, it also has a distinct purpose of its own in that it has helped me scope my thesis and define both its purpose and my research questions. In addition, I have used Tier 2 data to guide the development of my research design and the identification of a suitable research sample.

- 3.3.3 Constructivist grounded theory

My second 'strategy of inquiry' relates to the research methodology known as constructivist grounded theory (CGT), first expounded by Kathy Charmaz (2000, 2006) as one of several permutations evolving over time from of the original, emergent model of grounded theory created by Glaser and Strauss (1967). Further developed by Glaser alone (1978; 1992), the original form contested that: '...theory emerges from the data, using various tools to facilitate such emergence and the 'discovery 'of the data that is embedded in the data' (Cohen *et al*: 715). In particular, it advocated the development of

theories from research that was grounded in qualitative data rather than the deduction of 'testable hypotheses from existing theories' (Charmaz, 2014: 6).

A second version, recognised as the 'revised, systematic model' of grounded theory, evolved as a result of developing differences of understanding and practice on the part of Glaser and Strauss. The model published by Strauss and Corbin (1990; 1998) and later revised by Corbin and Strauss (2008; 2015), perceived grounded theory as a more prescriptive methodology involving a prescribed sequence of 'open', axial' and 'selective' coding, for example, as well as offering detailed descriptions of different memo types. In addition, it favoured the writing of a literature review early on in the research process as a means of developing 'theoretical sensitivity and hypothesis generation' (Cohen *et al*: 715), thus bringing into question Glaser's argument that starting the review early could lead to preconceived ideas and potential bias on the part of the researcher.

According to Charmaz (2014), CGT is as inductive, comparative, emergent and open-ended a methodology as is Glaser and Strauss's original version. However, her viewpoint differs from that of the earlier theorists in that she perceives theoretical concepts to be *constructed*, rather than revealed or 'discovered', through situations such as interactions with others, ways of looking, interpretations and meanings. The constructivist approach is subjective, in that it rejects the objective idea that the researcher can be either a 'neutral observer' or a 'value-free expert' (ibid: 13). Rather, it is *the researcher* who is ultimately responsible for defining and constructing what is taking place in the data, and for shaping the analysis, on which processes their own values, preconceptions and prior knowledge and experiences must all inevitably have a bearing. In this way, she asserts that her position aligns with those social constructivists, influenced by Vygotsky (1962) and Lincoln (2013), who stress 'social contexts, interaction, sharing viewpoints and interpretive

understanding', and view 'knowing and learning as embedded in social life' (ibid: 14).

From a personal viewpoint, I was particularly attracted by the simplicity and flexibility of the CGT approach as articulated by Charmaz, especially as its epistemological and ontological foundations appeared to resonate well with what I was beginning to understand about my own views as a researcher. I therefore posited that the inclusion into my research design of certain strategic practices associated with the methodology might enable me to attain my research objectives in a manner that would be more rigorous and fit-for-purpose. However, I was conscious of the concerns raised about grounded theory (for example, by Thomas & James, 2006) and also that I would be inexperienced in using a relatively complex set of procedures – which was my rationale for preferring CGT rather than other iterations of grounded theory. Nevertheless, I decided to pursue this approach but with the early realisation that it might prove impossible, impractical or inappropriate to rigidly implement all the various tools recommended (Cohen *et al*: 717-20). In this respect, it is reassuring to note Charmaz' assertion that:

'In practice ... few researchers show evidence of conducting theoretical sampling and of constructing theory ... To me, engaging in iterative research is not equivalent to theory construction per se' (2014: 15).

Ultimately, I incorporated the following strategic approaches into my research design, based on Charmaz (2014: 15), and in line with her six 'analytical steps' as outlined by Cohen *et al*: 716:

- conducting data collection and analysis, simultaneously and ongoing
- analysing actions and processes rather than themes and structures
- applying CGT's three types of coding: initial, focused and theoretical (see Section 3.9)

- consistently using memoing, particularly for reflective and reflexive purposes, for developing the conceptual aspects of emergent focused codes and themes, for capturing fieldwork events and contextual dimensions, and for recording operational processes (Hutchison *et al*, 2010; Waring, 2012)
- using inductive construction and co-construction of abstract explanatory categories for those actions and processes
- drawing on the data in order to form the analytical framework for this study (see Section 3.9.1)
- using comparative methods, such as constant comparison of data.

3.4 Conceptual framework

As explained in Chapter 1, I have endeavoured to define and clarify the boundaries of this study (Gray, 2006: 322-3) by establishing a conceptual framework based on what I perceive to be the learning programme enactment process (ref. Table 3a). As Gray indicates, the idea that research might be structured in such a way was originally formulated by Miles & Huberman (1994). Basically a means of describing, in narrative and/or graphical format, 'the key factors, constructs and variables being studied' and of illuminating and hypothesizing on the possible relationships between them, conceptual frameworks generally consist of what Miles & Huberman refer to as a series of intellectual 'bins'. Each bin contains a key event or behaviour selected by the researcher who is thus compelled to specify not only what is to be studied but also what is to be omitted.

In the context of this thesis, the conceptual framework consists of four ‘bins’, all of which are interrelated, non-linear and at times overlapping (Ball *et al*, 2012), as shown in the summary diagram below:

DEVELOPMENT	INTERPRETATION	TRANSLATION	OPERATIONAL
<p>Encoding – what comes into the institution, either as a concrete entity or as an ‘influence’ from external sources/policy makers</p>	<p>Decoding – ‘...engagement with the languages of policy...’; ‘...the process of meaning-making which relates the smaller to the bigger picture (Fullan, 2001: 8) that is, institutional priorities and possibilities to political necessities.’ [Ball <i>et al</i>, 2012:44-45]</p>	<p>Recoding – ‘...closer to the languages of practice ... a sort of third space between policy and practice.’ [ibid: 4]</p>	<p>Practices and Procedures [Bell & Stevenson: 148]</p> <p>- what happens may change over time and/or prompt change</p> <p>- who makes it happen 8 ‘policy actors’ [Ball <i>et al</i>: 49]:</p> <ul style="list-style-type: none"> • Narrators • Entrepreneurs • Outsiders • Transactors • Enthusiasts • Translators • Critics • Receivers

Table 3a: Conceptual framework overview

Appendix B demonstrates how this conceptual framework was used in the early stages of my research to build a speculative comparison between ‘policy enactment’, according to Ball *et al*’s conception (2012), and my understanding of how it could be applied to ‘learning programme enactment’. The purpose of this exercise was to clarify some of the key characteristics of each component of the framework/enactment process and the implications they might have for my proposed research design. However, given the inductive nature of my research it is important to stress that this was principally about beginning to: ‘...establish patterns, consistencies and meanings’ (Gray, 2006: 6).

3.5 Piloting

Piloting has taken place in two phases and on both occasions the same sixth form centre, or 'pilot study centre', has been involved. As Yin observes (2018: 106-108), piloting can help refine both the content and procedures to be followed regarding one's data collection plans. In this instance, my approach was to focus primarily on content in the Phase 1 study and to use Phase 2 for testing and refining fieldwork procedures:

- **Phase 1: Pilot Case Study** – primarily formative and somewhat deductive in character, or at least confirmatory (Gray, 2006: 126); the intention was to use a small scale comparative study of two centres in order to improve the validity of my emerging research questions and my understanding of some of the concepts underpinning my proposed research design;
- **Phase 2: Pre-Test Study** – in the words of Yin, this phase was intended as: '...a formal "dress rehearsal" in which the data collection plan that is used is as faithful to the final plan as possible' (2018: 106-7) and, as such, was conducted in a more inductive or exploratory manner; in effect, using a single centre to test out and gain feedback regarding all the procedures and research instruments I had planned to use with the three case study centres, thereby potentially improving the reliability of my findings.

- 3.5.1 Pilot study centre

As outlined in Chapter 1 (Section 1.3.1), the pilot study centre, in common with all three of the case study centres, has offered the EPQ for well over six years, and has managed to sustain high levels of staff and student commitment and enthusiasm towards the qualification during that time. Innovative teaching and learning approaches developed in the EPQ programme have gradually permeated throughout the institution and, at senior leadership level, the

programme has been valued for making a significant contribution to the range and quality of overall post-16 curriculum provision. In particular, through my previous professional contact with the centre, I had become aware of the creative connections that had been developed between the EPQ and careers education, work experience and employer/community engagement, making it an ideal case for investigation during the Phase 1: Pilot case study on vocational learning and the EPQ, carried out in 2013.

Subsequently, it seemed logical to invite the centre to participate as one of the main case study centres for this thesis but, by early 2016, it was becoming clear that fundamental institutional changes were occurring that might threaten its ability to undertake this role successfully, despite its interest in being involved. In particular, the centre had lost influential members of the senior leadership team (SLT) who had been strong advocates of the EPQ, at a time of increasingly severe financial cutbacks. As a result, the lack of funding was beginning to affect staff availability and time committed to EPQ enactment, and there were indications that the diminishing status of the EPQ at SLT level was threatening its long-term viability. Therefore, in order to maintain the positive relationship that I had already established both prior to and during the pilot case study, it was decided to use the centre for the Phase 2: Pre-test study only.

As has been done for each of the case study centres (Section 3.7.2), there follows an overview of the pilot study centre's curriculum provision, together with a description of their approach to EPQ enactment.

- Overall curriculum profile

The main aim of the pilot study centre, in keeping with that of SFC3, is to provide a sixth form study programme that combines academic excellence, chiefly in the form of A levels, with a myriad of opportunities for enrichment that both contributes to students' studies and helps develop their personal

and leadership skills (Ofsted, 2014). At the time fieldwork visits for this research were taking place, more than 20 different A level subjects were being provided, as well as a small number of AS level qualifications. Significantly, this is the only institution which has had experience of running the International Baccalaureate as well as A levels, although interest in the programme has recently waned. In addition, many of the centre's enrichment activities are linked to the achievement of a prestigious award or scholarship. Overall, as referenced in their most recent Ofsted full inspection report (2014), the interests and needs of this centre's students are particularly well catered for, given that the great majority eventually choose to apply for university (with an exceptionally high percentage achieving places in the top third of institutions, including Oxbridge (Gov.UK, 2015), and many aspire to follow a professional career in areas such as medicine, engineering or law.

Nevertheless, each year, a tiny minority of students prefers to progress on to further training, foundation courses, employment or an apprenticeship and is equally well supported in the process as those aiming for university. All students benefit from high quality careers advice and effective guidance regarding future education and training options (Ofsted), and all are encouraged to organize and undertake work experience during Y12. In effect, the centre's aim is to create as many opportunities as possible for students to take responsibility for their own learning, allowing this to develop naturally through self-motivated enquiry and research.

Throughout the institution, a good range of ICT facilities and resources exist for supervised and independent study, including classroom- and Library-based computers. Although smaller than those in the other centres, the Library is well-stocked and provides an attractive learning environment. It is run by a small team of highly-knowledgeable, resourceful and enthusiastic individuals who regularly contribute to course delivery and are ever keen to offer one-to-

one support and advice for staff and students. This includes help in sourcing materials, useful contacts and research opportunities via a broad range of regional libraries, universities and specialist collections, with whom they have developed strong links. To some extent, these networking skills offset the impact on the Library of centre-wide financial constraints which have greatly reduced their ability to subscribe to the kind of digital online resources such as e-journals, videos, magazines and subject databases enjoyed elsewhere.

- EPQ Enactment

The EPQ is offered as an optional enrichment activity to all students in Year 12 and normally attracts an initial group of between 40 and 60; some will inevitably withdraw from the programme when they return in Year 13 due to other commitments or study pressures. They are supported by approximately 30 experienced supervisors who undertake the role on an unpaid, voluntary basis, meeting supervisees during free periods, or outside working hours. Significantly, this is the only centre to regularly recruit supervisors from non-teaching as well as teaching staff members; those involved have included librarians, IT technicians, receptionists and administrative assistants.

In contrast to the three case study centres, the EPQ is not run as a timetabled learning programme at the pilot study centre. Instead, any whole-group taught sessions tend to take place during lunch hours or after school and a limited number of supervised study sessions are held in the summer term only. Moreover, it is the students' responsibility to arrange meetings with their supervisors during their free time. The awarding body for EPQ has been AQA ever since the centre began offering the qualification, unlike the changing situation occurring at SFC1, 2 and 3.

The overall programme, including supervisor training, resources and day-to-day support, is managed by an EPQ Coordinator, a senior member of staff with specialist subject expertise in English and Critical Thinking who has been

responsible for the programme (voluntarily) since it started at the centre in 2009. Following recruitment in March, interested students attend an introduction to the EPQ early in the summer term, followed by a series of taught element sessions, each lasting 45 minutes, over a four-week period. In addition, two suspended-timetable 'EPQ Days' are held, during which students learn about basic research skills, begin to shape their topic ideas and develop an action plan.

Each student is allocated a supervisor in June with occasional whole-group project development sessions continuing throughout June and July. However, given the un-timetable nature of this programme and emphasis on self-motivated and independent learning, of particular importance to all is the dedicated EPQ website on Google Docs through which staff and students communicate and can access essential resources and guidance. In keeping with other centres, the summer vacation is deemed essential time for the bulk of students' independent research and writing-up to be done as all completed projects must be submitted to supervisors by end-September of Year 13. A formal Presentation Evening then takes place in early October, in front of an audience of students, staff, governors, family members and community partners. Finally, once all production logs and supporting Presentation evidence have been handed to supervisors by mid-October, assessments and moderation can be completed before the end of October.

- 3.5.2 Piloting approach

- **Phase 1: Pilot Case Study**

The pilot case was presented at the Journal of Vocational Teaching and Learning (JVET) Conference, 2013, and explored the extent to which the EPQ might be considered a suitable vehicle for vocational learning and/or

employment, and not solely as a preparation for university and academic study. My research topic was inspired by Bathmaker (2013), and underpinned by evidence gathered during discussions with key policymakers and practitioners, together with my own observations of EPQ enactment. Two EPQ centres (a school sixth form and a sixth form college) participated in the comparative study, both of which were known to me for their skill in encouraging – and, more importantly, enabling and supporting – students to select not only a broad range of ‘academic’ but also ‘vocationally-related’ EPQ topics. Both had also been extraordinarily successful in recruiting large and diverse EPQ groups from their annual Y12 cohorts.

In order to address my research question, I conducted a review of EPQ policy and practice within both centres. The research design included:

- A review of relevant literature, including relevant awarding body interventions
 - Documentary analysis, including EPQ Coordinator reports, EPQ Production Logs, exemplary teaching and learning approaches
 - Semi-structured interviews with the respective lead EPQ Coordinators, supervisors and a small sample of students
 - Observation of student/supervisor interactions during directed study sessions.
-
- **Phase 2: Pre-Test Study**

The pre-test study took place between April and October 2016 and involved three centre visits, plus ongoing phone discussions with the lead EPQ Coordinator for the purposes of explaining the study format and purpose, organising visit programmes and interviewees/observations and, finally, to provide mutual feedback. Although the timespan of the study slightly

overlapped the start of my fieldwork visits to the three case study centres, all instruments had been tested and refined prior to their further use in these centres and the logistical aspects of the research design had also been improved (Yin, 2018: 108).

In all, four one-to-one interviews took place (Lead Coordinator; Principal; Supervisors: 1. Assistant Head; 2. Librarian). Two group interviews (one each with staff and students) and two observations were also conducted, and a quantity of materials scrutinised, including online EPQ resources, student logs and guidance materials for supervisors. It was also possible to explore resources available for EPQ support in the centre's Library. All interviews were recorded and transcribed.

- 3.5.3 Implications for final research design

- **Phase 1: Pilot Case Study**

Through investigating a single aspect of the 'reality' of EPQ learning programmes across two contrasting centres, the pilot case study forced me to reconsider my whole approach – to recognize that, in order to fully understand the enactment process 'from the inside', it would be essential to take a pragmatic and flexible approach in my interactions with my various research participants and to avoid imposing my preconceived notions and assumptions about the EPQ. This ultimately influenced my decision to work within the field of constructivist grounded theory.

Administering the research instruments in each centre, and subsequently reflecting upon the data collected, raised issues regarding the potential impact – positive and negative – of structural and stylistic features on interviewees and those being observed, as well as the ways in which the content and sequence of questions can affect respondents' mood and motivation. More

generally, I became aware that any future research must capture the voice of SLT members in order to determine how they may be influencing EPQ enactment. Finally, the unexpected identification of five key 'EPQ centre' characteristics common to both institutions, fundamentally reshaped my thinking regarding my overall research aims and questions:

- 1. There needs to be a clear rationale and sense of purpose clearly communicated** – for both centres, the use of the EPQ as a means of enhancing candidates' UCAS applications was by no means denied but it was also seen as a short-term goal; developing a long-term passion for learning was undoubtedly what mattered more. In the school setting, many students testified to the educational, intellectual and emotional benefits of completing an EPQ – for them, these far outweighed the initial short-term goal relating to attaining a university acceptance.
- 2. The Centre EPQ Coordinator requires a robust vision regarding the programme and resilient leadership qualities** – the lead EPQ Coordinator's ability to communicate their vision for the EPQ throughout their institution appeared to be pivotal to success, and also to ensuring institution-wide recognition of the qualification's status; their sustained support for those tasked with supervising students was of equal importance.
- 3. EPQ Supervisors need to be well trained, supported and committed** – crucial for both the supervisors and their supervisees. As the pilot study research took place in 2013, only five years after the EPQ's national roll-out, many of the supervisors I interviewed were still relatively inexperienced in maintaining a one-to-one supervisory relationship in which the supervisee was required to take the lead, rather than their supervisor. Clearly, good training was key to nurturing confidence in the role, as was a robust system of support for supervisors, especially in the case of non-teaching staff such as catering or administrative staff who had been recruited as supervisors.

4. **Centres need to build opportunities for students to apply knowledge gained in the course of their EPQ programme, including interaction with employers and the wider community** – both centres actively encouraged EPQ students to engage with employers and other community contacts, though this was not perhaps as fully developed as it might have been; even so, movement towards stronger integration of the EPQ with work-based opportunities such as work experience placements was, at that time, seen as a priority.
5. **The EPQ learning programme should fully complement, and be embedded within the curriculum** – in both centres the well-planned introduction of the EPQ had made an impact across the entire curriculum, and in the case of the school, across all Year Groups. It was explicitly linked to the school's mission statement and contributed to the integration of research-based learning across every Key Stage, resulting in an average of 50-100 post-16 students signing up for the programme each year. Within the Sixth Form College, the annual cohort had expanded to around 750 students over five years.

- **Phase 2: Pre-Test Study**

The pre-test study sought to gather feedback on logistical and technical matters such as timing and length of instruments (Cohen *et al*, 2018: 179), possible environmental factors and the sequencing of data collection events. In addition, questions, questioning techniques and the Opinion Finder activity were reviewed for validity, appropriateness and elimination of overlaps or ambiguities. Finally, gathering feedback on the extent to which the various interviewees fully understood the purposes of my research was essential in order to minimise the number of occasions when biased, skewed or reflexive responses might be received.

Learning points from the pre-test that particularly helped shape my final research design related to:

- **the contribution of the lead EPQ Coordinator to research protocols:** in ensuring that all interview locations promote focus, confidentiality and minimum disruption; in recruiting suitable interviewees well in advance of the intervention;
- **additional contextual dimensions:** the contribution made to EPQ enactment by librarians and Learning Support Centre staff needs in-depth investigation;
- **the importance of interviewer sensitivity (Corbin & Strauss, 2008: 32):** interviewees who assume *they* know already what they will be asked about the EPQ – they may try to ‘take over’ the interview; over-enthusiastic interviewees who try to tell the researcher everything before the interview has actually commenced; the importance of adopting a flexible approach when limited interview time is unavoidable; nervous interviewees – especially SLT members;
- **benefits from group interview sessions:** encourage supervisors to share reflections and attitudes regarding the programme, often for the first time;
- **the Opinion Finder activity:** some interviewees respond reflexively or cautiously and may need reminding that their views on EPQ enactment in their own centre will be treated in confidence.

3.6 Research methods

The sources of evidence I chose to interrogate for this study, described below, are commonly associated with case study research (Yin, 2018): interviews, observations, documentation, records and artefacts. In addition, and in

keeping with constructivist grounded theory practices, I wrote memos and maintained a methodological journal throughout the fieldwork visits.

Case study fieldwork visits were conducted over May to November 2016, this being a period of seven months spanning both the Y12 summer term and the Y13 autumn term of the same EPQ cohort in all three centres. The timing was intentional as it enabled data collection to take place at various critical stages throughout the learning programme, specifically during the early 'induction' phase, the 'middle' phase immediately following the summer vacation – when students were expected to have completed a substantial amount of independent research and, having returned to college, had in many cases found themselves working with a new supervisor – and during the 'final' phase of the programme when projects were nearing completion and students were engaged in Presentation Events. In all, three full day visits per centre were made (n=9 days), comprising time for interviews and observations, independent scrutiny and collection of online, digital resources, including institutional documentation and EPQ web-based guidance materials (produced in-house) and follow-up, informal planning, monitoring and feedback discussions with each respective lead EPQ Coordinator. In addition, in order for the researcher to be able to gain a deeper understanding of some of the key cultural and contextual aspects regarding their participants' settings (Crotty, 1998), opportunities were made for me to investigate various aspects of everyday life at each centre; for example: exhibitions of students' work, other than EPQ; social and work environments available to staff and students; Learning Resource Centre/Library facilities; work-related/career-related provision.

- 3.6.1 Semi-structured interviews

The nature of my study, with its imperative for entering into interpersonal interactions with my informants in order to co-construct meaning, necessitated a qualitative research approach and the decision to use interviews as my chief source of collecting evidence. As Yin succinctly observes:

‘Interviews can especially help by suggesting explanations (i.e. the “hows” and “whys”) of key events, as well as the insights reflecting participants’ relativist perspectives.’ (Yin, 2018: 118)

Being aware of the likelihood that the potential contributors to my research would have limited time availability, due to teaching and management responsibilities, I decided to adopt a focused, semi-structured approach in which each interview would last around one hour. Thus, they were to be what Yin terms ‘shorter case study interviews’ (ibid: 119). For the same reason, although I had initially been interested to conduct more of a longitudinal investigation, with fieldwork visits taking place over the whole duration of the EPQ programme and informants being interviewed on more than one occasion, I eventually determined that this would be impractical and would likely ‘unduly stretch’ the goodwill of each centre.

Stylistically, I aimed to conduct interviews that were more an interpersonal, ‘social encounter’ than solely an occasion for information exchange or capture (Cohen *et al*: 507). In line with Brinkmann & Kvale (2015), I viewed my relationship with informants as one in which the interviewer is a “traveller”, in that they are: ‘...participating together with the subject [*the interviewee*] in the production of knowledge’ (ibid: 172), and the occasion as one where: ‘...knowledge is created “inter” the points of view of the interviewer and the interviewee’ (ibid: 149). In keeping with the semi-structured format, open-ended questions were prepared which were sufficiently flexible to allow for

the wording and sequence to be tailored according to the needs and responses of individuals. In addition, a series of probes were prepared in order that each interviewee might be invited to: ‘...extend, elaborate, add to, exemplify, provide detail for, clarify or qualify their response...’ (Cohen *et al*: 514) depending on the detail initially provided. This was also a useful means of ensuring that a similar range of topics was addressed with everyone.

One-to-one interviews were conducted with EPQ stakeholders and contributors comprising five distinct roles, although in all three centres there were examples of interviewees who represented a combination of roles. These were:

- Centre Principal
- SLT member (e.g. Vice Principal; Centre Curriculum Manager; EPQ Line Manager)
- Lead EPQ Coordinator
- EPQ Supervisor
- Librarian/Learning Resource Centre staff.

In order to be able to more easily triangulate the data gathered through the interviews, a similar three-part, themed structure was adopted for all schedules (see Appendices F-H: Interview Schedules 1-3), covering:

- Part A: General background information
- Part B: Background to the EPQ
- Part C: Internal management and delivery issues.

By the same token, questions asked were intentionally of a similar nature in terms of structure and content, although some tweaking of the schedules was necessary to ensure they would be fit for purpose with regard to the role/s

undertaken by respective interviewees and the kind of data they might be able to supply. For example, certain questions were only asked when appropriate, such as that probing leadership style and the key values underpinning it which was specifically designed for Principals (Appendix F: Q3). Similarly, unless a 'stakeholder' was also known to be a 'contributor' to the EPQ, there would be little point in asking their opinion on the manageability of the supervisor's role (Appendix H: Q7) so this question would be omitted. In particular, it was essential to question the lead EPQ Coordinator on their centre's choice of awarding body as well as details of influences and constraints affecting management and delivery of the programme (Appendix G: Q7/16-17), issues about which they only would probably be aware.

With the exception of two telephone interviews (arranged to fit in with respondents' availability) all other interviews were conducted on a one-to-one, face-to-face basis. All were recorded and then transcribed and all began with completion of the Opinion Finder activity described in Section 3.6.3. The thematic structure of the interview was explained to each respondent and ensuing discussions were open and flexible, prompts being offered to assist the flow and focus of conversation where necessary and to ensure consistent topic coverage across respondents and centres. In line with Johnson & Rowlands's observations on in-depth interviewing, I intentionally allowed some flexibility into each interview, rather than sticking rigidly to my schedule, in order to explore individuals' priorities and interests, to: '...“go with the flow” – that is, consider following for a while where the informant wants to lead' (2012: 109).

In all, a total of eighteen interviews was conducted (n=6 per centre), each lasting an average of 1 hour. Within the parameters of the required roles listed above, suitable respondents were primarily selected via negotiation between

the researcher and the lead EPQ Coordinator, subject to individuals' willingness to participate and their availability.

- 3.6.2 Group interviews

The decision to conduct group interviews rather than 'focus groups' was made primarily on the basis that the latter, although a form of group interview, relies entirely on the interactions of participants with each other rather than with the interviewer, meaning that at times, '...the participants' rather than the researcher's agenda can predominate' (Cohen *et al*, 2018: 532). Given the limited access that I was able to gain to students within each of the case study centres, together with uncertainty as to how well they might 'gel' in such a contrived situation, and the fact that I wanted to maximise the possibility of producing data on a similar range of topics to those covered in the one-to-one interviews, the group interview model therefore seemed more appropriate. Nevertheless, when conducting each session, I intentionally adopted a facilitating/moderating stance in order to encourage interaction between participants where possible, taking care to establish mutually respectful 'ground rules' with the participants, in order to avoid individuals dominating the proceedings. A particular benefit of this approach was that participants regularly 'cross-checked' or completed each other's accounts (Arksey & Knight, 1999: 76), although I was aware that occasional lapses into 'group-think' may have discouraged contribution of an independent viewpoint at times. Even so, unlike the experience of Watts & Ebbutt (1987) regarding group interviews, on no occasion did it appear that students were particularly deterred from sharing personal matters or opinions of relevance to the discussion, whether they knew the rest of the group or not.

Initially, it was planned to use the group interview format solely for eliciting the views of student participants in the EPQ programme. However, it became

necessary to adapt the Contributors: Supervisors schedule (Appendix H) to a group interview format in order to accommodate a pair of supervisors during fieldwork visits to SFC1. As with one-to-one interviews, a three-part, thematic structure was applied for both students and supervisors but, in order to allow time for multiple responses to be given per question, a more practical, open approach was taken with fewer separate questions posed and more activity/interaction encouraged between the respondents. The structure comprised:

- Part A: Opinion Finder activity
- Part B: The EPQ experience – 7 questions broadly reflecting the topics covered in one-to-one interviews
- Part C: Opinions on the EPQ – think-pair-share Post It Note activity.

As with the one-to-one interviews, participants in the group interviews were made aware at the outset of the proposed thematic structure and were free at any time to ask for clarification of a question or activity. In all, either one or two student focus groups took place at each centre, involving a total of twenty-four participants (n= 8 per centre with an even split of males and females on each occasion) with each lasting an average of 1 hour 10 minutes. Students were selected in two centres by the lead EPQ Coordinator (SFC1 and 2) but in SFC3, it was necessary for the researcher to personally invite students encountered during their Presentation Events to a group interview session later the same day. Every effort was made to create a group that would reflect a broad range of EPQ projects and project outcomes and the identified students' supervisors were consulted as to their suitability in advance of their being formally invited to participate. As with student groups at the other two centres, no individual was previously known to the researcher.

All sessions took place in normal teaching rooms and were conducted in a generally informal and relaxed atmosphere where students acted maturely and treated each other's contributions with respect throughout. As most of the sessions took place in the students' own time, it was decided to offer them a small, edible reward after each session. This was greeted very favourably and on several occasions, encouraged students to stay after the interview to discuss their EPQ experiences on a more informal basis.

- 3.6.3 Opinion finder activity

The brief 'Opinion Finder' activity sheet (Appendix E) was administered to all respondents at the start of the one-to-one interviews or group interview sessions. All accepted the invitation to complete the task, apart from two senior managers in different centres for whom interview time was known to be particularly limited due to commitments such as teaching or tutoring (Vernon²; Jenny³), and a student from SFC2. Because it was essential that the interviewer should provide a clear, verbal explanation of what to do during the activity, it was decided not to ask these three respondents to complete and submit their sheets at a later date following their interviews in case they had misunderstood the instructions and subsequently skewed results for their respective centres.

The same version of the Opinion Finder was provided for everyone, regardless of their involvement in/with the EPQ learning programme. This was intentional, given that the researcher's underlying objective regarding inclusion of the activity was to be able to make comparisons between data gathered from stakeholders, contributors and EPQ participants, both within a specific centre and across centres, and within the same category of respondents as well as across different categories. It was also intended that the simple, tick-box approach might act as an 'ice breaker'. It could help put

respondents at their ease and provide a brief opportunity for them to get to know the interviewer. It would encourage each individual to focus and reflect carefully on the EPQ, and their experience of the programme in their own centre, from the very outset of the session, thereby creating a basis of observations and views to enable fuller participation during the subsequent interview discussion.

In terms of content, the sheet sought to collect data on topics that were less likely to be covered in depth during one-to-one and group interviews, purely because of time constraints and the prioritisation of topics to be addressed. Nevertheless, it was considered appropriate to probe a little into these topics in anticipation that the activity might help shed some light on each individual's interpretation of the EPQ's overall purpose at both macro and micro levels. In addition, by comparing responses, it might be possible to detect the extent to which staff and students in each centre were in agreement regarding their interpretation of the EPQ, albeit that the numbers canvassed in each centre were bound to be small.

Concerning its design, the sheet sought to gather feedback on the following issues:

- Firstly, the role the EPQ can play in supporting students to achieve their desired career pathway. Either, to what extent do respondents view the EPQ as an 'academic' qualification which is primarily a passport to higher education; or, do they view it more as a 'vocational' qualification which might act as a passport to employment? Or is it equally useful for fulfilling both of these objectives?
- Secondly, the range of possible opportunities – over and above achieving the qualification itself – that the EPQ might offer to participants. Specifically, how much importance do respondents place on each of 10 selected 'opportunities' relating to: the enhancement of knowledge and

understanding of both familiar and less familiar subjects; the development of specific skills, attitudes and behaviours on a short, medium and long-term basis; and, interaction with the wider community beyond the confines of their respective college or school?

With regard to the process adopted in administering the Opinion Finder, all respondents were asked to work independently and not to share their views with colleagues (during group interviews) before returning their completed sheet to the researcher. Respondents were free to ask for clarification whilst completing their form but were not encouraged to discuss their views openly with the interviewer at this stage. The design of the form ensured that all were invited to express their opinions twice from slightly different perspectives. Firstly, in the column entitled 'My View', they were asked to share their personal views on the EPQ's purpose and the opportunities it might offer, i.e. what they believed the EPQ learning programme should *ideally* be like – based on personal knowledge and experience – by entering a tick against their preferred option for parts A and B and then ticking each box in part C once (low), twice (medium) or three times (high), to denote the level of importance they believed each of the ten listed 'opportunities' deserved.

Once the first stage had been completed, most respondents immediately assumed that the whole task was finished. However, the researcher then revealed the second, unexpected, stage in which they were asked to review the nature of the EPQ programme offered in their own centre and assess what it was like *in reality*. Using the same process again, they then ticked boxes in the second column, intentionally left untitled, on the sheet. It was hoped that any differences between ratings given in the first and second columns might serve to indicate the level of satisfaction each respondent felt about the type of EPQ provision available in their own centre compared with their personal hopes and expectations for the qualification.

The researcher considered asking the lead EPQ Coordinators in each of the case study centres to distribute the Opinion Finder more widely to those EPQ students and supervisors not participating in one-to-one or group interviews. This could have added an element of quantitative data to the study which might perhaps have shed light on the opinions of a larger, more representative sample from each centre. However, due to the 'surprise' element regarding stage two of the task which, as mentioned above, necessitated a verbal explanation from the researcher before it could be completed, this idea was abandoned. Instead, it was decided to administer the task solely to those directly participating in the research process.

- 3.6.4 Observations

In all, a total of ten sessions and activities was observed at the three centres: SFC1 (n = 4); SFC2 (n=2); SFC3 (n = 4). The variation in type and number of events observed, as well as the number of students involved, was chiefly dependent on what non-timetabled events and/or timetabled EPQ lessons were taking place during scheduled fieldwork visits and what else was happening in the same timespan (some students were on study leave or attending an English conference when I observed their supervised session). Observation planning required the researcher to take a pragmatic and flexible viewpoint, working with the lead EPQ Coordinators to achieve the best possible options, despite several unforeseen and unavoidable constraints. Nevertheless, a rich variety of activities was observed in all three centres (see Appendix J: Observation Summary), providing an excellent insight into the operational practices and procedures occurring within the various EPQ learning programmes. They covered both timetabled and non-timetabled events, as well as routine and 'one-off' sessions: 5 supervised sessions comprising taught element and tutorials; 2 Librarian-led sessions; 1

presentation by an external partner (HEI); 4 sessions related to presentation skills, including 2 formal Presentation Events in the style of a 'marketplace'.

Witnessing at first-hand these EPQ programme events was particularly useful for gathering data to assist in:

- triangulation/verification processes – making comparisons between the EPQ programme in action and the verbal accounts gathered during interviews
- dispelling researcher assumptions and preconceptions
- comparing and contrasting practices in different centres/communities
- identifying creative and innovative approaches likely to help generate successful EPQ enactment
- detecting approaches that may actually inhibit successful enactment.

The approach taken, as reflected in the Observation field notes pro-forma (Appendix K), was closer to that of a semi-structured observation than an unstructured one, in that I was generally aware of what was likely to be happening on each occasion and had constructed a brief agenda of issues about which I wished to collect data. The pro-forma was completed using a laptop computer or via handwritten note-taking during each session, with the intention of maintaining a detailed descriptive record of the events occurring rather than of charting their incidence, presence or frequency. In addition, following each session, reflective memos were written to capture my overall impressions of the event and how it had progressed, its participants and the setting or context.

As demonstrated in the Observation Summary grid (Appendix J), my role in these ten observation sessions varied enormously, from complete observer, to observer-as-participant, to complete participant (Cohen *et al*: 543). On all

occasions, my role *as EPQ researcher* was made known to the group being observed but I was not always personally aware of the observer role I was about to play. At times, the need to be a 'complete participant' was inevitable due to the nature of the event, as in the Presentation Events (observations SFC3-3 and -4). Conversely, during supervised session SFC1-2, I was initially unaware that I would be expected to transform from 'complete observer' to 'observer-as-participant'. Participant-observation undoubtedly provided both opportunities and challenges (Yin, 2018: 124-5): **opportunities** for one-to-one interactions with students and their projects, for accessing artefacts personal to them, and for convening follow-up discussions (SFC3); **challenges** regarding one's ability to remain unbiased and impartial, to continue as an observer of the whole event rather than a part of it, to continue taking accurate and trustworthy notes when one's attention is deflected, and to avoid slipping into the role of 'teacher' in place of 'researcher'. However, challenges also emerged during supervisor-led direct observations, particularly with regard to reflexivity as some supervisors tended to act differently due to nerves or a desire to impress the researcher.

- 3.6.5 Documentation, records and artefacts

The scrutiny of relevant documentary information has been undertaken as part of both Tier 1 and Tier 2 research activities and has proved invaluable for supplying historical, administrative, technical and cultural details important for setting other data in context, and for corroborating and augmenting evidence from other sources (Yin, 2018: 115). For the most part, information has been easily retrievable. For example, Tier 2 contacts such as policy makers have been willing to pass on archival records and memoranda relating to the origins of the EPQ, and all three case study centres (Tier 1 research) have generously enabled my access to their internal EPQ websites and archives, together with

examples of teaching and learning materials and programme plans. In addition, I scrutinized centre prospectuses, recent Ofsted reports and relevant internal policy documents, including confidential and/or publicly available institutional items such as strategic plans and relevant governing body reports. Most centres also provided examples of student project work from previous EPQ cohorts as well as statistical information (where available). Other resources scrutinised included items made available to centres on the respective awarding body EPQ websites. These comprised: EPQ criteria; forms required for the qualification; examples of good practice; examiners' reports. Other documentation scrutinized included Cambridge Assessment, Ofqual and JCQ Statistical data.

- 3.6.6 Memos and methodological journal

Throughout the fieldwork visits, a methodological journal was maintained to capture important contextual details surrounding all one-to-one and group interviews, as well as all observed sessions. In addition, I adopted the CGT practice of reflective and reflexive memo-writing – of which the methodological journal entries were a type – as soon as I began coding and data analysis. This was used in two ways: firstly, to track the transition from initial through to focused coding, reflecting on the meaning and theoretical implications of initial codes in order to define, redefine and recode them until I was able to create a logical and fit-for-purpose framework of conceptual themes and focused codes (Appendix C). I then wrote conceptual memos for each of the emergent focused codes or categories, based on what I had drawn from the data, in order to make myself question my assumptions as to their meaning and to verify whether they truly reflected respondents' views and opinions rather than my own interpretations of what had been said. As may be observed in Chapter 4 (Section 4.2), a common format was applied to each

conceptual memo, based on the model propounded for memo-writing by Charmaz (2014: 180), in order to instil a sense of uniformity across every conceptual memo and to ensure that the same topics were consistently addressed. Thus, each contained:

- **A title** – providing a sense of purpose and direction; all titles, or focused code names, used gerunds to connote respondents' actions;
- **A definition** – for Charmaz, this moved my interpretation 'beyond description into analysis', which in turn helped with 'explicating its [*the category's*] properties or characteristics'; in each case, the definition was summarised in a set of bulleted key characteristics which emerged during the coding process through adoption of the 'responsive categorization' stance, to be mentioned later in Section 3.9;
- **An explanation** – to identify the direction in which the focused code/category (and subsumed data) is leading and to record any key assumptions embedded within it;
- **Evidence of emergence** – tracking *how* and *when* the category develops and changes; also, *why* and *for whom* it has relevance in the field setting.

Finally, I used memos to track, over time, some of the operational processes and procedures I employed – and my reflections on their efficacy – and also to record my views on associated, significant articles or reports.

3.7 Sampling

- 3.7.1 Sampling approach

A purposive sampling approach was adopted in which the researcher determined which case study centres to select, based on a set of criteria relating to the needs of this study; namely, centres meeting the criteria must:

- have sustained a ‘successful’ EPQ learning programme for at least six years
- have demonstrated innovation and creativity regarding EPQ enactment
- have an EPQ programme that has survived key periods of change and transformation, due to internal and/or external factors
- be willing and able to participate in this study, both the centre itself and especially the lead EPQ Coordinator who would be required to give of their time and energy over an extended period.

Often a feature of qualitative research, purposive sampling was deemed to be more appropriate than random sampling in this instance because of the necessity to access a range of ‘knowledgeable people’ (Cohen *et al*, 2018: 219), able to provide in-depth information about seemingly successful EPQ enactment and how they believe this to have been achieved in their respective centres. It is also important to emphasize that generalizability was not to be the prime impetus for this study and that outcomes would therefore not be unduly affected by the use of purposive sampling. Nevertheless, it was hoped to be able to access a reasonably representative sample, albeit a small one of only three centres.

In an effort to minimize bias in selecting the sample (Gray, 2006: 88), I sought suitable recommendations from some of the policy makers interviewed during my Level 1 ‘background research’ activities; lead EPQ Coordinators in these centres were then invited to participate, together with Coordinators in a number of centres already known to me. Ultimately, six centres were approached, of which two were unable to participate due to other commitments, and one (the pilot study centre) eventually withdrew from the main study due to internal pressures.

Of the three centres finally selected, two had been recommended and were unknown to me and one had worked with me on previous case study and

evaluative activities relating to the EPQ. Interestingly, all were Sixth Form Colleges – school sixth forms had been invited to participate but FE Colleges had not as it was felt it would be impossible to accurately determine key factors for successful EPQ enactment given the huge number of variables impacting on the enactment process in such large and diverse settings.

With regard to the selection of suitable respondents to be interviewed or observed in each case study centre, it was anticipated that this would mainly be a collaborative, negotiation exercise between the researcher and each lead EPQ Coordinator. The latter would be the ‘gatekeeper’ and ‘knowledge source’ and would aim to recruit individuals who they felt would be ‘knowledgeable’ and likely to communicate well. As such, the approach taken was somewhat akin to ‘snowball sampling’ (Gray: 88) combined with what Patton (1990) terms ‘intensity sampling’ where the individuals selected may be described as ‘information-rich cases’ who represent the issue in question more typically, or clearly, than those at the extremes.

- 3.7.2 Case study centres

At the time when fieldwork for this research was conducted (2016), the range of post-16 study programmes being delivered in all three case study centres – including the EPQ – was broadly similar, albeit with some differences, depending on centre priorities and resources, and staff/student needs and interests. However, in order to establish a fuller contextual understanding of each centre, there follows a summary of key features of curriculum provision in each setting, some of which may later be seen to have had a significant influence on their respective EPQ programme interpretation, translation and overall enactment. In addition to the broader curriculum description, a sense of the distinctive characteristics underpinning EPQ enactment in each centre is

briefly presented, as discerned by the researcher during fieldwork observations and follow-up associated documentary analysis.

Reference is made throughout the following descriptions to a section of the Gov.UK website entitled 'Find and compare schools and colleges in England', the most recent version of which provides data on the student cohort leaving in 2017, together with student destinations data for those leaving in 2015. A number of comparisons involving all three case study centres have been made, based on Gov.UK data.

- **Centre 1 (SFC1)**

- **Overall curriculum profile**

According to their most recent Ofsted report (2016), SFC1 ensures that all students benefit from a particularly broad education alongside the primary focus of achieving their qualifications. Provision comprises the opportunity to undertake solely academic or vocational qualifications, or a mixture of both, as well as to participate in an outstanding range of enrichment activities. A wide range of almost 30 A level subjects is offered, together with AS levels and a small number of GCSEs. In addition, the centre offers professional qualifications at Level 2, plus a large range of Level 3 BTEC, OCR and Cambridge Technical vocational and applied courses. These include BTEC Certificates and Diplomas, OCR Diplomas and Extended Diplomas. Students can also access a small number of Level 4 and 5 qualifications such as the Higher National Certificate (HNC) and Diploma (HND), and Foundation Diploma. The majority of students aim to progress on to university, with a significant number attaining places within the top third of HE institutions (based on the most recent Gov.UK data available: 2015), although a small number prefer to move on to employment, further training or an apprenticeship.

SFC1 has invested heavily in the provision of a well-stocked, highly sophisticated and attractive Library/Learning Resource Centre (LRC) which offers an introduction for students to the kind of resources they may be able to access when at university. The LRC is run by an experienced, professionally-qualified team, some of whom regularly contribute to learning programmes, including the EPQ, both during and outside timetabled lessons by teaching groups and classes in purpose-built LRC study rooms, through directly supporting tutors and/or by providing one-to-one advice sessions for students. In line with the whole institution, the LRC offers excellent access to ICT equipment and WiFi is available for students and staff. As well as the hard copy library, there is a digital library service linked to course-related resources and websites (such as the EPQ) and students can also access a range of e-journals, magazines and newspapers, DVDs and films, referencing tools and subject resources sites, to help them in researching topics and project development.

- EPQ Enactment

In SFC1, the EPQ is offered to all Year 12 (Y12) students on an optional basis. Recruitment of potential candidates takes place prior to decision-making regarding their Year 13 (Y13) options and is supported by an Enrichment Fair at which selected Y13 EPQ students present their completed projects and share their experience of the EPQ journey. At the time of fieldwork (2016), almost 400 students had enrolled on the programme, although in previous years, cohorts have been as large as 750; a sizeable increase in numbers was being forecast for 2016-17. On average, 30 supervisors are required to meet student demand annually; all are teaching staff from both academic and vocational subject backgrounds with new supervisors being recruited each year to supplement the core experienced team. They are led by a recently-appointed EPQ Coordinator with subject expertise and leadership experience in

geography and citizenship. Coordination of the EPQ attracts additional funding but no extra time; the role is line managed by an Assistant Director.

EPQ enactment has taken place at SFC1 ever since the pilot evaluation phase (prior to national roll-out in 2008-09) during which the researcher for this thesis was the centre's case study evaluator. For most of that time, the EPQ awarding body has been AQA but this changed to OCR some four years ago following an internal policy review. The programme has always been timetabled, meaning that students benefit from a dedicated EPQ supervised study session per week (currently of 1hr 30mins duration). Each class consists of no more than 18 candidates to enable each supervisor to manage the volume of work and assessment, but as there are often more than 30 classes, more experienced supervisors are occasionally asked to support two groups.

Unlike any of the other centres, SFC1 students can apply to join either a subject-specific or a generic class, depending on what they are planning to do for their project. Some may be interested in researching topics relating to areas in which the centre has supervisors with relevant knowledge, and feel they would benefit from specialist support; for example, in short film production, law, art history, creative writing or chemistry/medicine. Others may prefer to work in a mixed group, regardless of their topic.

Following a training and planning day for supervisors, teaching sessions begin in June of Y12 and continue throughout the autumn and early spring terms of Y13, with students being expected to use the summer vacation for intensive topic research and project preparation. The course begins with two introductory lectures, delivered centrally to the entire cohort. These are designed to introduce the EPQ and its structure, and to give an insight into the role of the supervisor, how to access relevant resources and what is required of students enrolled on the course. Thereafter, supervisors are responsible for delivering the bulk of taught element topics, following a suggested programme

outline and utilizing online resources as desired. They also provide regular one-to-one and group monitoring and support. Lessons are held in classrooms containing sufficient computers to enable students to work independently on their research and writing-up at any time; however, these are supplemented by a series of sessions on topics such as referencing, plagiarism and dealing with ethical issues, run by Library/LRC staff in the LRC classrooms. In addition, the centre offers students a series of optional lunchtime lectures from university representatives linking the EPQ to undergraduate life and study, as well as organized visits to a local university library.

Unlike the other centres, SFC1 does not run a formal EPQ Presentation Event. Instead, between January and March of Y13, students arrange with their supervisors to present their projects to their class during a timetabled lesson or to an invited audience at an agreed time, for example during a lunch break. Completed projects must then be handed in for internal assessment by supervisors and are ready for submission to the awarding body in May.

Throughout the programme's duration, communications are managed via Moodle. A vast array of regularly updated resources, guidance and useful links such as access to EPQ-dedicated Mooc courses run by HE, is provided for staff and students and good use is made of student voice strategies such as annual questionnaires to help evaluate and shape the programme.

- **Centre 2 (SFC2)**

- **Overall curriculum profile**

For SFC2, improving the achievements of students through provision of excellent standards in teaching and learning is the primary objective. In particular, the centre is committed to preserving the breadth and depth of its provision and to preserving student choice as far as possible, despite the often

strained financial climate of the FE sector nationally. In similar vein to SFC1, students are offered either solely academic or vocational qualifications, or a combination of both, and have the opportunity to participate in an extensive range of enrichment activities, particularly sports and performing arts. At Level 3, they can choose from 50 different courses, including more than 30 subjects at A level, together with a broad range of vocational programmes such as BTEC and Cambridge Technical single and double award Diplomas and Certificates. Alternatively, a number of sector-specific Level 2 vocational pathways are available for those not meeting L3 entry requirements on commencement of their post-16 studies; these study programmes may include GCSE resits in English and Maths if required. For all students, the centre promotes the notion of employability and meaningful engagement with employers and the wider community, including enabling them to source and organize a relevant work placement, internship or volunteering experience. This is done with the aid of a dedicated team of trained careers and community engagement staff.

Again, most SFC2 students take A levels with the aim of progressing on to university, with almost a third of successful candidates achieving a place at an HE institution in the top third of universities (Gov.UK: 2015). However, whereas more students appear to take up opportunities for further training than in the case of SFC1, slightly fewer SFC2 students tend to move on to employment or apprenticeships.

In line with their aim to create a stimulating and engaging learning environment for all, SFC2 has also developed a sophisticated and extremely well-equipped Library/Learning Resource Centre (LRC), offering a range of distinct study areas suitable for independent or group study activities. Professional staff are constantly available to staff and students via a Helpdesk Service, and some contribute to various learning programmes, including the EPQ, through providing one-to-one support for staff, sourcing appropriate

materials and/or by running advice sessions on research skills for student groups. In keeping with most of SFC2's classrooms, the LRC is extremely well resourced in terms of ICT equipment and computers for independent study; all students and tutors communicate via CristalWeb and Google tools such as Google Classroom and Google Sites. Also available is a Google-powered 'Study Directory' linked to the online LRC, enabling access to online resources such as DVDs, e-books and e-journals, Chromebooks and subject-related TV programmes, and a 'Parent Portal'.

- EPQ Enactment

As at SFC1, the EPQ is offered on an optional basis to all Y12 students, apart from the small minority pursuing a Level 2 vocational pathway. Recruitment takes place after the end of summer term examinations with approximately 125-150 students enrolling annually. However, of these, the centre expects that no more than 65-70 students will continue the course in Y13 and organizes its learning programme accordingly. On average, 20 supervisors are required for the Y12 cohort but this number is reduced to around 6 in Y13. Supervisors are all teaching staff from both academic and vocational subject backgrounds; there is a core of experienced EPQ supervisors keen to continue year-on-year, whereas others tend to be recruited from over-staffed departments. They are led by a Curriculum Manager for the EPQ whose subject expertise and leadership strengths lie in Philosophy and Economics, together with Critical Thinking. EPQ management responsibilities attract additional funding, time and status, although this has not always been the case, and the role is monitored by a Deputy Principal responsible for curriculum and innovation.

SFC2 is distinctive in that it has had many years' experience of promoting the value of undertaking independent research projects, particularly as a means of increasing the HE prospects of its most able students, but not specifically with

regard to delivering the EPQ (although it did contribute to the early development of the qualification). In the past, project work was supervised by staff on a non-timetabled, voluntary basis, and the results – written dissertations on self-chosen topics linking students’ A level subjects – were highly prized and celebrated within the institution. Later, students undertook project work combined with Critical Thinking before, some six years ago, the centre decided to adopt the EPQ as part of their overall curriculum offer. They believed this would not only broaden the range of students benefiting but would also enable them to gain a recognized qualification for their efforts and allow them to pursue practical as well as written projects, such as artefacts and performances.

Originally, the EPQ awarding body selected by the centre was AQA, perhaps a natural consequence of their intensive involvement with that organization during the piloting of the qualification. However, as with SFC1, an early decision was made to move to OCR following a review of paperwork demands on the supervisors. EPQ candidates have always benefited from regular timetabled lessons with the programme structure occurring in three distinct phases:

- 1) the taught element (Y12) – delivered over 4 weeks from mid-June onwards; 3 lessons x 1.5 hours are built weekly into teaching blocks freed up by the cessation of A levels
- 2) independent research (summer vacation) – Y12 students set themselves realistic targets with support from their supervisors which, if not achieved by the start of Y13, may result in their withdrawal from the programme
- 3) supervised independent study (Y13) – 1 lesson x 1.5 hours per week throughout the autumn term; ideally, projects must be handed in at the end of term.

Throughout the course, classes generally consist of up to 18 candidates, although once the expected student drop-out has occurred at the start of Y13 – resulting in the need for fewer supervisors – group sizes may increase to as many as 20 students and all supervisors will have responsibility for two, or even three, groups. Thus, most students find themselves working with a new supervisor in Y13. All groups are generic in make-up and students interested in researching subject-specific topics are encouraged to use their initiative in seeking out relevant staff members and/or external partners for information. Lessons take place in well-equipped classrooms with plenty of computers and other IT equipment available for independent work and presentation purposes. In addition, there is an accompanying Moodle course for students to access online if they cannot attend a lesson.

Phase 1 of the programme commences with a planning meeting for EPQ supervisors in which they are updated on the course purpose, content and assessment requirements. They are provided with a comprehensive range of online resources, including background guidance materials, spreadsheets on which to record student targets, and a series of proposed lesson plans and materials covering the taught element, for which they are primarily responsible. Once Phase 3 begins, less emphasis is placed on providing instruction and supervisors assume more of a 'hands-off', monitoring and support role, meeting their allocated students on a flexible, one-to-one basis. Throughout, the programme is supported by Library/LRC staff who provide ad hoc advice on research sources and run, in consultation with the supervisors, regular small group sessions in the LRC during lesson times on topics such as referencing. There is also the opportunity for EPQ students to make a university visit and to access HE library resources online.

In November, a formal EPQ Presentation Evening takes place in front of an audience of students (including Y12), centre staff, friends and relatives. In

addition, invitations are sent to the presenters' feeder schools. The event is a high profile occasion but it is not compulsory; approximately three weeks beforehand, students are offered several options for presenting – in class, at the Event or to an invited audience in their own time. As with SFC1, internal assessment takes place during the spring term – with late entries allowed up to March – for submission in May. Finally, a post-course student questionnaire is distributed to all participants, whether completing or not, to elicit opinions on its various components and the different forms of support provided.

- **Centre 3 (SFC3)**

- **Overall curriculum profile**

In contrast to the mixed curricular provision offered at the previous two centres, SFC3's aim is to provide high-quality learning experiences and *academic* excellence in the form of A levels. No students enrol primarily for the purpose of taking L2, 3 or 4-5 vocational qualifications at this centre, although a tiny minority may eventually study for an applied general qualification. Instead, it offers a 'standard' Study Programme for all students, comprising A levels (usually three, although around 25% of each year group study four subjects) plus extensive enrichment courses and extra-curricular opportunities, and the EPQ. Since 2015/16, this approach has been consolidated through the gradual withdrawal of AS levels and eventual introduction of linear A levels. More than 35 subjects are offered, reflecting the centre's determination to maintain breadth, depth and challenge, regardless of sectoral funding reductions (as mentioned under SFC2) and the impact of A level reforms.

The centre's curriculum offer is intended to meet the specific needs of its student population, of whom the vast majority intends to progress on to university. As many as half of all successful candidates go on to study at one of

the most sought-after institutions, including Oxbridge (Gov.UK: 2015), although a sizeable minority of each annual cohort opts to go straight into employment. Interestingly, fewer students progress on into further training, or an apprenticeship, than at any of the other centres involved in this research. In addition, SFC3 is deeply concerned to ensure that all its students and staff benefit from participating in a caring and supportive atmosphere underpinned by a strong sense of community. To this end, a particularly high profile is given to the importance of using 'student voice' strategies in maintaining, evaluating and improving provision (Ofsted, 2008), and to the implementation of mentoring and coaching systems for both staff and students.

Since fieldwork visits were conducted at SFC3, significant investment has been channeled into the remodelling of the Library and Resources Centre to create an attractive, purposeful and student-oriented learning environment, set in a more appropriate location and offering users a good number of open-access PCs and independent study areas. Undoubtedly, this will have improved access to, and encouraged more consistent use of, the existing excellent range of audio visual and digital resources. Moreover, it may also have helped to further promote the expertise of the team of librarians and digital resources specialists keen to support staff and students. In addition to its constantly-updated and extensive stock of books, the Centre subscribes to many e-journals, periodicals and information sources such as Jstor, and students and staff can also access subject-specific materials such as DVDs and videos via Clickview.

A strong emphasis is placed at SFC3 on independent learning as a key part of the A level challenge 'experience'; to this end, students are expected to utilize virtual learning resources via SharePoint 365 in their studies and this is accessible wherever they are working, including the Library.

- EPQ Enactment

SFC3 is the only one of the three case study centres to run the EPQ as a compulsory enrichment experience within its extended curriculum provision. Consequently, well over 1,000 students are enrolled annually on the course. They are supported by a team of 25 supervisors on average, most of whom are teaching staff from academic and vocational subject backgrounds who have availability on their timetables, although two are external partners contracted solely to deliver EPQ sessions each week. Many are highly experienced in supervising EPQ candidates and some hold additional responsibility as Moderators or Learning Leads, tasked with guiding students in developing specific project types: dissertations, performances or artefacts. EPQ management and coordination is the remit of a Head of EPQ whose subject background is geography, combined with leadership expertise in developing the centre's extended curriculum/enrichment provision. The role is line managed by the Deputy Principal and attracts additional funding, time and status due to the considerable size of the EPQ cohort.

As with the other two centres, SFC3 has had long experience of running independent research project activities for students. It was originally involved in piloting the L2 Higher Project which it introduced as a means of developing students' skills of independent inquiry. However, it was soon realised that SFC3 students needed greater challenge, leading the centre to begin offering the L3 EPQ from around 2009. At first, this was offered on an optional basis alongside other qualifications such as General Studies and Critical Thinking, attracting an average of 300-400 candidates annually, but gradually the EPQ became the extended curriculum qualification of choice for the centre and other courses were phased out. The EPQ was recently made compulsory as a means of ensuring that its benefits would reach those middle and lower ability

students who most needed them – not solely the high flyers who regularly choose it as an option anyway.

As with both the other case study centres, SFC3 initially worked with AQA as their EPQ awarding body but when candidate numbers soared it was decided that a move to OCR might help reduce paperwork pressures on both students and supervisors. As with the other centres, SFC3 students have always benefited from regular timetabled EPQ lessons (currently 1 lesson of 65 minutes duration takes place per week). Up to 2016, the custom has been to begin the programme in January of Y12 and for students to hand in completed projects no later than end-September of Y13. Thus, the programme structure witnessed by the researcher was as follows:

- 1) January to February half term – 6 weeks of taught element sessions (1 lesson per week)
- 2) February to March – 6 weeks' supervised study classes; these sessions combine time for whole-group information-giving and instruction, one-to-one tutorials, monitoring and support, and independent research and project preparation
- 3) April to May – 5 further weeks of supervised study sessions
- 4) June to July (post-exams) – final 5 weeks of supervised study; initial project hand-in date mid-July although the majority will hand in after the summer vacation.

However, by early summer 2016, preparations were well in hand to move the entire course into Year 12 for the 2016/17 cohort, starting in October 2016. It was hoped that this alteration in programme timing would help reduce the pressure on Y13 students who currently have to complete their projects at the same time as preparing for university interviews and finishing A level courses.

Students are allocated to one of 48 EPQ groups and remain in the same group throughout the programme. Each group is made up of 23-24 students working on a diverse range of project topics as there are no subject-specific groups as in SFC1, and each supervisor is responsible for running up to three different groups per year. Priority is given to addressing the challenging issue of ensuring that all lessons occur in suitably equipped classrooms with sufficient computers available to allow for independent research and writing to take place during any session.

Throughout the course, supervisors are regularly involved in planning and training sessions, including small group and one-to-one meetings with the Head of EPQ for staff new to the role. Schemes of work for the taught element sessions are provided, although supervisors are at liberty to adapt these as they wish. Other forms of support for supervisors include a 'buddying' system to aid standardisation during the project marking and internal assessment stages, and access to the centre's EPQ website on SharePoint 365. The well-organised website contains a huge variety of useful resources, exemplars and guidance materials, with some links to university resources for the EPQ, and is continuously updated, based on supervisor and student feedback. In addition, supervisors and students have access to the centre's Library. However, one of the main contact points between the course and the centre's Library and Digital Resources Manager is via production of new materials for the EPQ website.

In early September of Y13, students participate in an innovative 3-day Presentation Event in the form of a 'marketplace'. This is their opportunity to exhibit and discuss their work with attendees, including other students, staff and supervisors (who also formally assess the displays and how well each candidate presents their work). Students present at one of six exhibition events held over the three consecutive days, each having the same amount of

display board and space, and are encouraged to ask for feedback and questions from their 'audience', bearing in mind that final submission is at the end of September.

3.8 Validity, reliability and ethical considerations

In addressing issues of validity, reliability and ethics with regard to this study, I have taken into careful consideration three specific categories of researcher responsibility, as identified by Johnson & Rowlands (2012: 112-14) along with BERA guidelines (2011); namely, the need for the researcher to:

a) protect subjects – which they suggest should be guided by three fundamental principles: 1) respect for all persons; 2) beneficence; 3) social justice (Belmont Report of the Office for Human Research Protections, 1979);

b) protect communities – in which the imperative must be: 'to avoid causing harm to the reputation, social standing, or social prestige of their informants' professions, occupations, communities, or groups, *as collectives*' (ibid: 113);

c) tell the truth – which, for Johnson & Rowlands, constitutes the most important ethical imperative of all.

In certain respects, my decision to investigate aspects of EPQ enactment can be classed as an example of 'opportunistic research' (Reiman, 1979) in that my interest directly arose from my professional experience as an evaluator and ongoing investigator of the qualification. My experience in the field has undoubtedly produced many benefits, particularly: in-depth knowledge and understanding of the programme and its purpose; existing relationships with practitioners and policy makers who were therefore willing to contribute to my research; access to relevant literature and EPQ guidance documents, some not in the public domain; ready access to examples of pedagogical practice and student work; 'marginal membership status' (Johnson & Rowlands, 2012) in the case study centre (SFC1) with which I had been associated for many years.

Nevertheless, with regard to ensuring the validity, reliability and trustworthiness of both the research process and its potential outcomes, several areas of concern have emerged. For example, how to deal with potential issues arising from the impact of unintended researcher bias, including:

- alienation or inhibition of respondents because they feel that I, as their interviewer, may know more than they do about the topic;
- inferences or assumptions made: based on limited or out-of-date personal knowledge; arising from the fact that it may not be possible to observe an event referred to by an informant, and, therefore, there is a danger of concluding that '*a* has led to *b*'; also, due to my previous experience of other individuals in similar positions, regarding the information respondents may be capable of providing;
- tacit influences on interviewees, possibly affecting their answers: for example, they may respond in ways they think I want to hear; they may 'hide' information through concern about being judged or that confidences may be passed on to their peers/line manager.

In order to overcome such issues, I developed a number of strategies. Firstly, I sought to build relationships based on mutual trust, open communication and cooperation with all my research participants, both students and adults. In particular, I applied sensitivity and flexibility in my dealings with the three lead EPQ Coordinators, the three crucial 'gatekeepers' through whom I have been able to access suitable informants, 'insider' EPQ programme and centre information, and relevant observation opportunities. Secondly, I developed a self-observant and reflective approach as an interviewer, making consistent use of eye contact and positive body language to establish a friendly but business-like, focused atmosphere during sessions, and verbally reinforcing the confidential nature of the proceedings. As far as possible, I also strenuously

avoided taking any form of openly critical stance in response to comments and statements made during interviews or informal follow-up discussions.

Thirdly, in order to increase convergent validity, I built measures into my research design to encourage triangulation (Cohen *et al*, 2018: 265; Yin, 2018: 128-9). In particular, these included:

a) methodological triangulation - in which I employed different methods, such as interviews and observations, in order to study the same topics;

b) instrument triangulation - in which data-collection instruments such as interview schedules were similarly structured in order to be able to compare and contrast data gathered from EPQ stakeholders, participants and contributors;

c) combined levels of triangulation – in which data is analysed from three perspectives: the individual level, the level of groups, and the institutional level.

Fourthly, I was particularly conscious of the importance of acting as a consistently reflexive researcher, given the preconceived notions and values that had inevitably arisen from my long-term experience and in-depth knowledge of the EPQ, and my extensive involvement with policy makers, practitioners, students and other post-16 institutions. I therefore aimed to deliberately acknowledge and understand the potential impact that I as researcher was bound to be having at every stage of my research. In particular, this approach forced me to regularly question what I was doing and the extent to which I might be unintentionally influencing my informants. For example, to what extent was I affecting interviewees' responses or causing them to reflect more than was necessary on a particular issue? Equally, to what extent had their responses led to an alteration in my mode of enquiry? This was especially important with regard to those with whom I had formed a longer-term

relationship (e.g. lead EPQ Coordinators). As a result, I aimed to become more sensitive and diligent in continually monitoring the nature of my reactions and interactions with informants, using the opportunity to make positive use of myself as a 'research instrument' where possible (Cohen *et al*: 303) in order: '...to view the subject matter from different angles, strongly avoiding the a priori privileging of a favoured one...' (Alvesson, 2011: 106), but also avoiding the skewing of my research outcomes in the process.

Finally, in order to further engage with informants on a co-constructive, collaborative basis, I found that building some levels of reciprocity into the various interactions was effective. For example, this was done through sharing creative discussions on ideas and practices to enhance current EPQ enactment or to help overcome a challenging situation. At times, this virtually transformed an interview into a professional development experience, with respondents feeling motivated by the, perhaps unexpected, usefulness of the experience and undoubtedly resonated with Pring's observation, as mentioned by Hartas, that thinking develops through: '...the constant negotiation of meanings between people who only partly share each other's ideas' (2010: 45). As Johnson & Rowlands (2012: 109) note, with regard to in-depth interviewing, although this strategy may not harmonize with the more traditional notion of impartial interviewing, it can be valid when: '...the nature of the research question itself ... entails a deeper process of mutual self-disclosure and trust building.' Ultimately, and in the interests of the constructivist grounded theory approach:

'The ideal goal is that the informant becomes a collaborative partner with the researcher in the intellectual endeavor at hand.' (Johnson & Rowlands, 2012: 106)

A further concern, for example also articulated by Atkinson *et al* (2003), relates to the question:

- **How do I know that my informants are telling me the truth?**

What is meant by 'truth' in this context, and how do I know if informants are being intentionally or unintentionally 'misleading'? Reflecting the constructivist views underpinning my research, Pring (2004: 50-1) argues that every individual lives in their own world of ideas, through which they construct the world (both physical and social), and that it is impossible to step outside of this world of ideas in order: '...to check whether or not they accurately represent a world existing independently of the ideas themselves' (Hartas, 2010: 44). For Pring, the notion of 'truth' must therefore be eliminated in this context, given that: '...there can be no correspondence between our conceptions of reality and that 'reality' itself' (ibid: 45). Thus, the only logical solution left to me, as the researcher, was to negotiate with my informants regarding our respective 'worlds of ideas', in order to reach some form of consensus. Ultimately, in reflecting on and analysing the data in order to determine the research findings, these 'consensuses' have inevitably become further subject to my interpretation and re-interpretation. Moreover, some aspects of 'truth' – factual points regarding operational practices and procedures – have needed to be checked in order to avoid jeopardizing the integrity of my research findings. Consequently, I have sought: '...independent verification through other interviews if and when possible...' (Johnson & Rowlands, 2012: 107) and have built strategies for triangulation into the research design.

Finally, a number of potential ethical issues were identified regarding my research plans which have been addressed in line with BERA (2011) guidelines. These related to the following items:

- **the potentially intrusive nature of the research** – it was recognised that the process of conducting in-depth research into EPQ learning programme enactment at the three case study centres would inevitably bring to light

historical as well as current perspectives, practices and cultures. As such, the research had the capacity to uncover potentially sensitive and/or negative historical data, perhaps relating to practitioners no longer associated with the respective centre and who were therefore not in the position to defend themselves and their actions. In order to avoid such problems, the anonymity of all individuals and centres was preserved as far as possible and, in planning the research design, steps were taken to: ‘...minimize the degree of intrusiveness to that which is necessary for the study’ (Lindsay, 2010: 117);

- **the importance of respecting data protection policies and procedures** – all centres were assured that they had the right to decide whether documentary paperwork requested by the researcher should be made available, and if so, whether prior consent was to be required of any candidates or supervisors involved;
- **the notion that recruitment is via informed consent – and that participants know they have the right to withdraw** – all research participants were aged over 17 years and, as such, all were deemed capable of giving informed consent. Concise information sheets were distributed to participants in advance of any interventions, outlining the purpose of the research and their potential role within it. These were attached to a written consent form, confirming that the participant had read and understood the information, had freely given their consent and knew they were free to withdraw at any time from the study, without penalty;
- **assurance of privacy for all participants, centres and other contributing organisations** – *as far as possible*, I have endeavoured to preserve the anonymity and confidentiality of all participants through never attributing information to them by name or referring to their centre, or its practices,

within any other case study centre involved in this research, or elsewhere. All informants referenced in this thesis were allocated pseudonyms (comprising a first name and the number of their centre, e.g. Jenny3), as were the three centres, and I also took into account any special privacy requirements regarding the communities with whom I have been involved. Even so, because of the small sample and distinctive nature of the centres investigated during this study, it was deemed appropriate only to offer participants assurance of a high likelihood that their anonymity would be preserved. Finally, I have ensured that all information supplied, for example in the form of digital recordings, has been securely stored;

- **reciprocity** – no financial payments were made to any of the respondents in return for their contributions in order to avoid the possibility of distorting researcher-informant relationships. However, in recognition of their willingness to contribute to my research, all participating students were offered confectionary as a reward after each session. Similarly, the lead EPQ Coordinators received a small gift by way of acknowledgement for the huge amount of time and effort they had contributed – and without which it would not have been possible to conduct the fieldwork for this study – and all adult participants received follow-up ‘thank you’ emails from the researcher which, in many cases, prompted further online discussions with individuals.

3.9 Data coding and analysis

Having completed the fieldwork phase of my research, I fully transcribed the digital recordings made of one-to-one and group interviews and also wrote detailed accounts of any observations undertaken, using the notes I had made during each observed session. The decision to use coding as a first step in analysing and making sense of the data gathered (Miles & Huberman, 1994:

56) seemed appropriate in this instance. I therefore uploaded the interview transcripts to NVivo Pro with a view to coding them against a predetermined framework of key topics and areas of interest closely associated with EPQ enactment (pre-determinate categorization). I identified these topics based on my own knowledge of the EPQ and previous experience of its delivery in a range of different settings. Items that may have been raised in interview schedules, the various components of the qualification, policy issues and processes involved in its delivery, were all included as I attempted to create my framework of relevant nodes. However, as soon as I began to code interview data to these nodes, I discovered that my approach was clearly not working as I had anticipated. The data from transcripts would not fit comfortably within the nodes I had selected.

I swiftly realised that I was beginning to manipulate the data to comply with my own assumptions and preconceived notions regarding the evidence I would need to derive from the data in order to answer my research questions (Cohen *et al*, 2018: 176). In effect, I was trying to impose my own views on the data rather than allowing my respondents to 'speak for themselves'. On reflection, I realised that the fundamental purpose of my research, as articulated in RQ1, was not so much to find out *how* selected centres enact the EPQ learning programme – in which case, coding data to topics might well have been appropriate – but *why* the various participants, contributors and stakeholders act, interact with and react to the programme in the ways they do. Why do they interpret and translate the EPQ in different ways, some of which may prove successful, but not all, and what may be influencing the decisions and actions they take, as well as the opinions and views they hold?

At this point, I abandoned my original ideas and early attempts to code using pre-determinate categorization, and began to search for an alternative approach that would enable me to learn *from* my respondents rather than

primarily impose my own assumptions upon them. My investigations into various models of grounded theory (GT), as previously outlined (Section 3.3.2), led me to focus upon the work of Kathy Charmaz (2014) and her constructivist interpretation of GT. Her explanation of coding as an ongoing process in which the researcher interacts on many occasions with a range of data gleaned from respondents, defining and refining their codes in order to: ‘...understand participants’ views and actions from their perspectives...’ (2014: 115), immediately resonated with my desire to allow the data to take the lead as far as possible, thereby creating for myself, ‘...an interpretative rendering that begins with coding and illuminates studied life’ (ibid: 111).

As a result, I started the coding process again but this time from a responsive categorization stance (Cohen *et al*: 668), approaching my data from the grounded theory viewpoint of ‘emergence’ and ensuring that: ‘...the questions I raise about these codes arise from my reading of the data rather than emanating from an earlier frame applied to them’ (Charmaz: 112).

Nevertheless, I was constantly aware that no researcher can completely isolate themselves from affecting how and what coding eventually emerges.

Inevitably, we are responsible for choosing which words most succinctly represent the meaning behind each of our codes: ‘...we define what we see as significant in the data and describe what we think is happening’ (ibid: 115).

Thus, it is unlikely that researchers can ever be entirely neutral when engaging with the data, ‘...because language confers form and meaning on observed reality...’ (ibid: 114) and, in selecting the language we use, we are constantly subject to the influences of prior knowledge, understanding and experience.

- 3.9.1 Selected coding process

In order to best satisfy my research objective of ensuring that respondents’ perspectives remained at all times the central focus of my enquiries, I elected

to adopt a coding process involving two methods: firstly, initial coding, and secondly, focused coding. Both advocated by Charmaz, and associated with (constructivist) grounded theory practice although not confined solely within that methodology, initial coding is, for Saldaña (2013: 59), a First Cycle, 'elemental' coding method, whereas focused coding is a Second Cycle method. Saldaña's two method groups, or Cycles, reflect his assertion that the qualitative analytical process of coding is cyclical rather than linear in character, given that one is constantly comparing data, codes and categories in order to refine and at times even to *recode* one's emerging codes. This approach appears reminiscent of grounded theory's requirement that researchers should use constant comparative methods (Glaser & Strauss, 1967) to help establish analytic distinctions at each level of their analytic work (Charmaz: 132) – a practice I continuously applied when working with both methods. However, although Saldaña's First and Second Cycles may imply that there is an element of sequence in the coding process, his approach is far less rigid than the three-stage sequence of open-axial-selective coding advocated in earlier articulations of grounded theory (Strauss & Corbin, 1990).

- **Initial coding**

Charmaz describes initial codes as: '...provisional, comparative, and grounded in the data' (2014: 117), having suggested 'initial coding' in 2006 as an alternative to grounded theorists' earlier use of the term 'open coding'. For Saldaña, it is an elemental method; a: '...starting point to provide the researcher with analytic leads for further exploration...' (2013: 101) which can help build a foundation for the application of future coding cycles (ibid: 83). With these aims in mind, I began the initial coding process by randomly selecting a representative number of interview transcripts from all three of the case study centres and including both adult and student respondents. Working

through each transcript on a line-by-line basis in Word, I followed Charmaz' advice: '...taking fragments of data apart and asking what meanings you glean from these fragments...' (ibid: 111), thereby entering what she would term an 'interactive, analytic space' (ibid: 109). Early on, I also decided to adopt a Process Coding' approach (Saldaña, 2013; Charmaz, 2002), using gerunds to connote respondents' actions in the data; for example: 'experiencing challenge'; 'locating the EPQ'; 'making comparisons'. Applying process codes in this manner enabled me to convey my understanding of what was happening *as seen through the eyes of my respondents* and to avoid jumping too quickly to conclusions: '...to make conceptual leaps and to adapt extant themes before we have done the necessary analytic work' (ibid: 117).

In particular, focusing on processes in this way assisted me to define the conceptual ideas underpinning and uniting related initial codes and associated passages of data in order to develop appropriate categories. This was done, prior to embarking on the Second Cycle focused coding, through the use of two iterations of Code Mapping (Saldaña, 2013: 194). By categorizing and conceptualising, it was possible to subsume the full set of thirty-five initial codes that had emerged so far into a more manageable total of sixteen categories, or early stage Focused Codes. These in turn were grouped according to similarity, generating four Conceptual Themes (see *Table 3b*). These four thematic groupings thus created a logical structure which clearly reflected the four 'bins' of the Conceptual Framework underpinning my research (discussed in Section 3.1): Development, Interpretation, Translation and Operational.

- **Focused coding**

Saldaña observes that Second Cycle coding methods are: '...advanced ways of reorganizing and reanalysing data ... to develop a coherent metasynthesis of the data corpus' (2013: 207). His opinion concurs with Charmaz' description of

focused coding as an emergent process involving assessing, comparing codes with codes and with data, and distinguishing those codes that have greater analytic power (2014: 140). Thus, once the sixteen categories were transferred to NVivo as nodes, it was possible to commence coding of the case study fieldwork data and, simultaneously, to conduct further category testing and re/construction, including recoding and discarding of some initial codes. In particular, my preconceptions about each emerging topic were evaluated through constant comparative analysis of codes and new and previously coded data, leading to amendments where appropriate. In addition, analytic memo-writing was conducted throughout the initial and focused coding stages as an integral part of the code- and category-generating method (Saldaña, 2013: 216).

Through the constant defining and redefining process described above, an 'analytical framework' was constructed which incorporated the emergent focused codes and conceptual themes. This was tested for comparability and transferability (ibid: 217) against all case study respondents' data, resulting in the framework shown below (*Table 3b*: Framework summary; see also the detailed version at Appendix C). Given that this fusing together of concepts into groups took place during analysis rather than at its end-point, this process may be considered reminiscent of 'theoretical coding' as promoted in the constructivist model of grounded theory (Cohen *et al*, 2018: 716).

A full description of what may be termed the dimensions encapsulated in each of the sixteen focused codes and the four conceptual themes is presented in Chapter 4. The explanations help to clarify the case study centre findings presented and discussed in the same chapter. Given that the framework and its component parts have been constructed directly from the data, it would seem logical to suggest that they must of necessity be treated as integrated within the research findings and analysis.

CONCEPTUAL THEMES	FOCUSED CODES
A. DEFINING CONTEXT <i>Relates to Stage 1: Development</i>	<ol style="list-style-type: none"> 1. Locating self (in relation to the EPQ) 2. Locating the centre, <i>i.e. institution</i> 3. Locating the EPQ
B. DETERMINING ATTITUDES/OPINIONS <i>Relates to Stages 2 & 3: Interpretation and Translation</i>	<ol style="list-style-type: none"> 4. Interpreting and translating the EPQ 5. Making value judgements 6. Feeling uncertainty 7. Speculating 8. Identifying expectations & needs
C. ACTING & INTERACTING <i>Relates to Stage 4: Operational practices and procedures</i>	<ol style="list-style-type: none"> 9. Participating in the EPQ 10. Managing EPQ demands 11. Reviewing / evaluating
D. EFFECTING RESULTS <i>May be seen to relate to all 4 Stages of EPQ Learning Programme Enactment</i>	<ol style="list-style-type: none"> 12. Responding to EPQ learning experience 13. Forming EPQ-related futures 14. Appreciating EPQ-related benefits 15. Encountering EPQ-related challenge 16. Recognising EPQ-related success

Table 3b: Analytical framework – summary

3.10 Conclusion

In this chapter, I have sought to establish the rationale for my chosen methodology and to present the approach I have taken in planning and designing the two interrelated ‘tiers’ of my qualitative research; namely, the multiple case study and its companion background investigation into the EPQ. Further, I have described the ways in which the various methods have been applied during data collection, coding and analysis procedures. I now move on, in Chapter 4, to presenting and discussing the findings from the data in an attempt to locate some possible answers to my research questions.

Chapter 4: Focused Code Findings

4.1 Introduction

As discussed in the previous chapter (Section 3.9.1), the coding process I have chosen for this research is based on constructivist grounded theory (CGT) methodology, and is strongly influenced by the work of Charmaz and Saldaña. Having decided to adopt a two-Cycle method of initial and focused coding, I used the latter, via NVivo, to reorganize and reanalyse the initial codes that had emerged from scrutiny of data procured during fieldwork interviews and observations. The sixteen focused codes or categories resulting from this process were in turn grouped under four conceptual themes, thus forming an ‘analytical framework’ or logical structure for my research (see *Table 3b* and Appendix C). As such, they represent not only the key topics emerging from my informants’ views and opinions but also the types of actions in which they were engaging as part of the interpretation-translation process. I found the continual use of reflective and reflexive memo-writing provided an invaluable means of constantly monitoring, questioning and testing my assumptions of, and opinions on, what the data might be inferring and of checking its validity against findings drawn from other data sources. Of particular importance in this respect was the development of a set of conceptual memos, each representing one of the emergent focused codes, in which I sought to capture what I had drawn from the data, with the eventual aim of building a meaningful and verifiable definition and overarching profile for each category.

Following a brief, ‘aide memoire’ summary of the three case study centres involved in my research (Section 4.1.1), the findings presented in Section 4.2 provide examples of opinions and observations from informants representing all three centres, grouped according to relevance within the sixteen focused code components of the analytical framework. Thus, the detailed category

profiles referred to above have been constructed, using information contained in my conceptual memos alongside observations from the research fieldwork which are illustrated and supported by relevant case study data. In order to instil a sense of uniformity and consistency across the entire analytical framework, each profile preserves the common format used for writing my original conceptual memos (as described in Section 3.6.6.)

- 4.1.1 The case study centres summarised

Prior to the presentation and discussion of key findings from the research, this section provides a short description of the three case study centres. Its purpose is to remind the reader of distinctive features pertaining to each centre and to draw attention to any significant similarities or differences evident amongst them – in effect, to ‘set the scene’ from within which the findings have emerged.

As discussed previously (Sections 1.3.1 & 3.7.2), all three centres are mixed gender Sixth Form Colleges in which the EPQ has been successfully enacted for at least six years, despite major episodes of internal and external change and transformation. Average student populations range between 2,200 and 3,800 (2016 figures) and all three colleges are based in the south or east of England. With regard to EPQ delivery, all three colleges run a timetabled programme and initially started with the same EPQ awarding body/exam board. However, for varying reasons, they have all since moved to a different organisation.

- **Centre 1 (SFC1)**

SFC1 is a large college of well over 3,600 full-time students and is located in a mainly residential suburb on the edge of a university city whose economy revolves around tourism, retail, engineering and manufacturing. It caters for a diverse population with a significantly greater number of students from socio-

economically deprived areas than at SFC2 or SFC3. Nevertheless, the majority of these students aspire to a university education and many attain places in the top third of HE institutions. As well as a number of adult education courses, the college offers a wide range of approximately 30 A levels, plus vocational and applied courses at L2 and 3 such as BTEC, OCR Diplomas and Cambridge Technical qualifications, and L4/ 5 HNCs and HNDs. SFC1 is extremely well equipped with facilities including a highly sophisticated Learning Resource Centre and well-stocked Library, and boasts a broad range of technical and ICT resources throughout the college.

The EPQ has been provided at SFC1 since its pilot phase evaluation, and the college has been recognised by Ofsted (2016) as one in which students make exceptional progress in the qualification. Offered to all students as an enrichment programme option at the end of Y12, the EPQ cohort during fieldwork was almost 400, supported by c.30 supervisors. Significantly, the recently-appointed lead EPQ Coordinator, line managed by an Assistant Director, receives additional funding for the role but no extra time. Weekly study sessions of 1.5hrs take place from June in Y12 and through the autumn and spring terms of Y13. Moreover, in contrast to SFC2 and 3, SFC1 students can choose to join either a generic or a subject-specific class most suited to their chosen project topic. Sessions are mainly run by supervisors but some are taken by Library/LRC staff or university colleagues; such partners play a far more active role in SFC1's EPQ than at SFC2 or SFC3. Noticeably, SFC1 does not run a formal EPQ Presentation Event but instead relies upon students to arrange to present their projects during study sessions or in their own time. Staff/student communications, guidance and training are facilitated via a dedicated EPQ Moodle site and student voice strategies are used for feedback.

- **Centre 2 (SFC2)**

Like SFC1, SFC2 caters for well over 3,600 full-time students but differs in not offering adult education. It is located in a more affluent residential district than SFC1, close to the centre of a large town whose thriving economy is linked particularly to specialist technology and engineering industries. In keeping with its commitment to preserving the breadth and depth of provision, students are offered a wide choice of c.50 different L3 courses, including more than 30 A levels and a broad range of vocational/technical courses, including BTEC and Cambridge Technical Diplomas and Certificates. Also available are sector-specific L2 vocational pathways for those unready for L3 learning. In particular, SFC2 promotes the importance of building employability and direct employer/wider community engagement for all its students, through work experience, internships and volunteering, and through the EPQ.

As most of SFC2's students aim for university, with a good third annually achieving places in the top third of HE institutions, the majority take A levels combined with enrichment activities from the extensive choice available, especially sports and performing arts. As with SFC1, SFC2's Library and Learning Resource facilities are both sophisticated and well-managed, and classrooms are generously resourced with technical and ICT equipment for use by both staff and students.

SFC2 is distinct in that it played an influential role in shaping the early development of the EPQ, due to its long-established practice of championing the benefits of independent research projects for more able students. Even so, it chose not to offer the EPQ itself for several years, until eventually recognising its potential for broadening the range of participating students, increasing the scope of project activities beyond dissertations, and for enabling candidates to gain a nationally-recognised qualification. The EPQ is now an option for all L3 students, offered towards the end of Y12 to supplement their Study Programme of three A levels. Annually, it attracts a cohort of 125-150,

supported by c.20 supervisors. However, as numbers usually reduce to c.70 in Y13, only c.6 supervisors are required for the Y13 autumn term. SFC2's lead EPQ Coordinator, known as a Curriculum Manager, is line managed by a Deputy Principal. He enjoys dedicated funding plus considerably more by way of status and time for the role than does his counterpart at SFC1.

As at SFC1, 1.5hr supervised study sessions are timetabled from mid-June onwards with 3 lessons per week taking place up to the summer vacation, reducing to 1 per week in the autumn term. All groups are generic in make-up and students are expected to use the vacation for independent research, based on a set of pre-planned, mutually agreed targets. Generally, supervisors use Y13 sessions for monitoring and support, often on a one-to-one basis, rather than for providing instruction; they also prepare students for presenting their projects, either at a formal, high profile EPQ Presentation Evening in November, or in class or to an invited audience in their own time. As at SFC1, staff/student communications are facilitated via an EPQ Moodle site and student voice survey findings are regularly used to refine the course.

- **Centre 3 (SFC3)**

SFC3 is the smallest of the three colleges with a full-time student population of around 2,400. However, it also caters for a substantial number of part-time students of all ages on its adult education programme. Located in an inner-city suburb of mixed residential and commercial character, it lies close to extensive university amenities like SFC1. However, as with SFC2, its students tend to be drawn from a more affluent, professional population. The diverse local economy features high-tech, engineering, pharmaceuticals and creative industries.

SFC3 aims to be a high achieving, specialist sixth form college. In contrast to the mixed academic and vocational programmes available at both SFC1 and SFC2, it focuses on providing academic excellence through a choice of c.35 A

level subjects for all full-time students, most of whom plan to progress on to HE. All enrol on a Study Programme comprising three to four A levels, plus enrichment courses/extra-curricular opportunities, and the EPQ. Up to half of all successful candidates go to the top third of HE institutions, whilst a sizeable minority go straight into employment. However, fewer SFC3 students than at SFC1 or SFC2 access further training or apprenticeships.

At the time of fieldwork visits, SFC3's Library and Resource Centre offered excellent audio visual and digital facilities but support was far less regularly accessed by EPQ students and supervisors than elsewhere. Moreover, Library staff, though willing, had less involvement in EPQ enactment. Nevertheless, with such a strong emphasis placed on independent learning, the college has ensured that virtual learning and ICT resources are widely and easily accessible wherever students are working.

As at SFC2, SFC3 is highly experienced in running independent research project activities. It originally participated in the L2 Higher Project pilot phase evaluation but began offering the more challenging EPQ as an option in 2009. Significantly, it is now the only one of the three centres to treat the EPQ as a compulsory 'enrichment' component of students' Study Programmes, aimed at ensuring students of all abilities benefit from the qualification. The EPQ cohort is by far the largest at well over 1,000 students, and is supported by c.25 supervisors, some of whom hold additional responsibilities. Regular supervisor support, training and planning sessions are strongly evident at SFC3 in line with the centre's values. Given the size and complexity of the programme, it is not surprising that the lead EPQ Coordinator role, entitled Head of EPQ and line managed by the Deputy Principal, attracts considerably higher status, time and funding than at the other centres.

As at SFC1 and SFC2, supervised study sessions are timetabled but shorter – 1 x 1hr per week – and, like SFC2, all 48 EPQ groups are generic. However, up to

2015/16, SFC3's EPQ began earlier than elsewhere – in January of Y12, with hand-in of completed projects taking place at the start of Y13. From 2017, the programme now runs for longer than at the other centres – throughout Y12. Another distinctive and innovative aspect of SFC3's EPQ is the 3-day series of Presentation Events held in early September of Y13 in the form of 'marketplace' exhibitions of students' project outcomes. Staff/student communications are catered for via an exceptionally well-organised EPQ website on SharePoint 365 and special emphasis is placed on using student voice survey findings to evaluate and improve provision.

4.2 Findings related to the Analytical Framework

As previously explained, the sixteen focused codes (FCs) forming the analytical framework for this study emerged through initial coding analysis and constant comparison, interpretation and reinterpretation of data gathered during case study fieldwork, supplemented by scrutiny of documentary sources and archival records. Consequently, it is intended that the sixteen category profiles presented below may serve as a compelling representation of the views and opinions proffered by research informants who, through the priorities they have placed on particular aspects and issues, have helped guide the researcher in the process of FC selection and development. Alongside interpretive information taken from my original conceptual memos, assertions made in each profile are supported, where appropriate, by relevant evidence gathered from all three case study centres. In addition, brief explanations regarding each of the four overarching 'conceptual themes' are provided. Finally, connections have been made between respondents' comments and the five 'contextual dimensions' discussed in Chapter 2 (Section 2.3.2) on the premise that interviewees' perceptions have invariably been prompted by and/or serve to illustrate some aspect of their interactions and interrelationships with the

diverse range of contexts encountered in their respective setting. Four of these conceptual headings were originally proposed by Ball *et al* (2012: 21): *situated*, *professional*, *material* and *external*. To address the distinct nature of this study, a fifth category was added, covering *teaching and learning* approaches.

In order to preserve anonymity, informants have each been issued with a pseudonym revealing only their gender and centre – for example, Harriet1. Further details of informants' roles can be found at Appendix A.

- 4.2.1 Conceptual Theme A: Defining context

The three focused codes grouped under Conceptual Theme A relate to the notion of 'locating', positioning or situating: FC1: Locating self; FC2: Locating the centre in which the individual is working; and FC3: Locating the EPQ. Data under 'Defining Context' help to shed light on factors influencing ways in which informants perceive themselves and underpinning what they believe to be their personal identity, role and status (FC1). They reveal key details and perceptions relating to the contextual dimensions of the setting within which an individual's experience of the EPQ is enacted (FC2). For the researcher, it is about beginning to build a picture of each informant or, perhaps more accurately, to develop 'a lens' through which to more fully appreciate and understand their opinions, preferences, values, actions and interactions with regard to the EPQ.

Evidence gathered under FC3 depicts the kind of knowledge individuals may have accrued about the EPQ. It is to do with their received 'wisdom' regarding the qualification and its purpose rather than about how they may have interpreted that information. In effect, much of what is dealt with under this Conceptual Theme relates to the 'development' or 'encoding' element of Ball *et al*'s enactment process (Appendix B). It captures information on what comes

into an institution, either as a concrete entity such as the qualification specification, or as an 'influence' from external sources, such as government agencies and policy makers. In other words, it concerns:

'...texts and 'things' (legislation and national strategies) ... also ... discursive processes that are complexly configured, contextually mediated and institutionally rendered.' (Ball *et al*, 2012:3)

- **FC1: Locating self**

Every research informant, be they EPQ stakeholders, participants or contributors, has a personal story to tell and different roles to play in different ways. Without getting to know them – albeit on a relatively superficial basis – it would be all too easy for the researcher to make assumptions or generalizations regarding interviewees' apparent motives for interpreting/translating the EPQ and interacting with it in the ways they do, and why their actions and opinions in relation to the programme have emerged, and possibly changed over time. Thus, evidence was sought regarding individual's self-perceptions that might help to make their interactions in other fieldwork contexts, such as observations, more meaningful. For example:

"I've been an EPQ Supervisor [*for*] probably 6 years? I guess I'm a guide, a facilitator, I'm an asker of questions – I'm definitely not a provider of answers!" (Jenny3)

Attempting to understand their wider institutional role, including the kind of community/ies of practice they most closely represent and interact with, was also essential in order to determine how this might affect their involvement with the EPQ:

"Quite a lot of what we do currently [*as EPQ Supervisors*] is akin to the work we do as tutors – where we're working 1-1 with students, talking

about where they are, what they're doing next, what their priorities are, where they're going... Some of those much more open-ended conversations that you have as a tutor are also really relevant to the mentoring conversations you have as an EPQ Supervisor." (Jenny3)

All informants were invited to discuss their experience of the EPQ, no matter how much or how little they had been involved in the programme. Several shed light on how the programme had changed over time and how this had affected them. For example, at SFC2:

"What we did at the beginning was to link it [EPQ] up with Critical Thinking (CT) so we had a paired course ... we ran the CT from September to January, they sat the exam in January and then the remaining time was spent on their Project. That way, we dealt with some of the taught skills for the EPQ in virtue of having done them for CT - building good arguments, assessing the reliability of sources..." (Paul2)

Others described how they applied their own professional standards and expertise to their EPQ contributions and how their personal experiences in other professional contexts compared with the EPQ learning experience, as did a new EPQ Supervisor:

"One of the things about being a lawyer is that, if you don't know something, you know where to go to find it, so those skills from training as a lawyer, you know... if you don't have an answer, you become quite adept at finding one." (Desreen2)

A broad range of relevant skills, abilities and motivating forces were suggested when informants were asked why they felt suited to the programme. For supervisors, in addition to an enthusiastic attitude, the ability to question and to possess strong organisational skills, knowledge and expertise gained from

teaching in other subjects and sectors, especially HE, formed a common rationale:

“I’m eclectic ... my first ever teaching job was teaching CSEs. We had our own Social Studies course and I taught 48 topics in one year over 3 year groups ... I’ve always liked the idea of breadth – not as opposed to depth, but breadth as a part of my armoury. This [EPQ] gives me real breadth in that sense.” (Guy3)

“Being a geographer’s quite good because we have to get a little bit of this, a little bit of that, pull it together – synoptic thinking ... And I think probably the other thing is my age! It’s mentoring, isn’t it – in a way? So, it’s not giving them answers, it’s facilitating their learning – which I think you get more skilful at the longer you’ve been teaching.” (Erica1)

For the more experienced lead EPQ Coordinators at SFC2 and SFC3, a particularly valuable skill was the ability to interact positively with their supervisory team:

“Being able to deal with staff in a non-threatening way, which doesn’t make them feel too pressured ... Most staff don’t choose to do the EPQ. A lot of them don’t realise what it is and there’s a danger that some of them might feel they’re being put upon if they’re approached in the wrong way. So I think one thing is to make them feel relaxed about it and happy with it. And it makes them feel appreciated – I think that’s one of the most important things.” (Ravi2)

For students, although some considered experience gained in other subjects to be useful – for example, the ability to write essays, find information and to analyse – attributes such as commitment, determination to succeed, a passion for one’s chosen project topic and understanding one’s own learning preferences were also of paramount importance:

“It’s weird but I like to do independent study. I feel that’s kind of, like, my learning style – I’d rather independently find something out than have someone talk at me all the time.” (Ellie2)

When discussing their reasons for participating in the EPQ, most SFC1 students mentioned the potential it held for improving one’s chances of success when applying to university or for an Apprenticeship, whereas at SFC2, this was cited more as a motivating factor that was helping to sustain their commitment. Reasons given by SFC2 students for participating in the programme revolved more around the opportunity for in-depth study of a topic they might not have been able to investigate in any other way:

“I was going to have to find an excuse to research it [EPQ topic]. It’s something that I’ve been interested in before ... and it’s an element of psychology that isn’t covered by any psychology course or even at the college, so it’s something very different that I think the EPQ has given me a chance to investigate further on my own...” (Anna2)

“I obviously knew what Economics was but I hadn’t studied it before, and I wanted to look into something further than the course because I’ve decided to do that at Uni, with Maths as well.” (Kathy2)

At SFC3, however, students were particularly enthused by the opportunities the *compulsory* EQP gave them for doing something unrelated to their A levels:

“I think the idea that you are able to choose whatever you want. I think it’s that choice that you have – it can really be personal ... something that you’re interested in and gives you an opportunity to do something just slightly different – I think it’s that ‘individualness’ that attracted me to it.” (Stuart3)

Or, for developing future career-related skills:

“Because I was already volunteering in a railway, for me, I’ve built steam engines so I’ve learnt like loads of practical skills which I think are going to be quite useful ... like, my aspiration is to be an engineer of the future.” (Kitty3)

Again, the EPQ’s potential for improving success at university appeared less important to SFC3 students than to those at SFC1, although what they hoped to study at university had clearly influenced their choice of project topic. Interestingly, when asked what factors were helping to sustain their commitment to the course, the majority of SFC3 students referred to interaction with people, such as peer reviews (Brian3), parents and tutors:

“My mum is a medical writer ... someone who knows what you’re talking about and would like to talk to you about it.” (Lorna3)

“One of the major things that motivated me was the fact that we kept having tutor reviews every term or half term, I think. So it meant that you knew ... you wanted to have completed a certain amount by then, because that’s what you were really expected to do. But in terms of how you got to that deadline, that was up to you.” (Stuart3)

For supervisors and even lead EPQ Coordinators, participation in the EPQ had often come about by default, perhaps due to timetable availability, combined with a personal interest in research and/or contributing to the programme and belief in its potential value to both the students and their centre:

“It’s intellectual freedom, isn’t it? And the ones that really understand and go for it really do produce some fantastic things – you just marvel at it. It’s great!” (Erica1)

The diversity of subjects chosen by students for project topics often stimulated supervisors to want to continue in the role (Desreen2; Paul2), whereas Library/Learning Resource Centre (LRC) staff, particularly at SFC1 and SFC2

where participation in the course had helped to transform their practice, were greatly enthused by the EPQ: "...because it's proper research and it's something to get your teeth into" (Enid2). As for informants' hopes and aspirations for the EPQ, the consensus of opinion across all three centres was that the qualification should grow in significance for all students (leading to increased take-up at SFC1 and SFC2) through development of its reputation nationally, which would then support its enhanced status and value internally and locally. For one SFC2 supervisor, increasing business/professional awareness and engagement was also vital, particularly with regard to the marking of projects because:

"It does feel a shame when someone's put their heart and soul into something and actually I [*as a non-specialist*] can't appreciate how good it is." (Paul2)

Moreover, it was essential that students should continue to take the EPQ because they were passionate about it, rather than as: "...a utilitarian part of getting a good offer", even though:

"One of the things on the mark scheme is how will this EPQ benefit me in terms of my skills, my chances of getting a job, my abilities in university? I actually think that's quite sad because what if someone just wants to find out about something because they love it?" (Paul2)

'Locating self' captures not only something of what has happened already to respondents – what each brings with them to their interview – but also data emerging as a direct result of participation in the interview process itself. In effect, because a respondent has had an opportunity to reflect on something about themselves, such as an experience or an opinion, they have come to a conclusion that might not have been held prior to interview. For example, having reflected on his previous interactions with librarians in local colleges regarding involvement with the EPQ, SFC1's Librarian began to recognise the

value of not only sharing *what* they do but also *how* they were contributing to EPQ enactment:

“I know that they do sessions like we do – but whether they do them *like* we do is a question ... Maybe [*we should*] have that chance to talk to other people about what they’re doing?” (Arthur1)

- **FC2: Locating the centre**

‘Locating the centre’ encapsulates informants’ views on their institution and presents their perceptions regarding its environment, culture and histories – key aspects of Ball *et al*’s ‘situated contexts’ and ‘professional cultures’ (2012: 21). Within its parameters are included opinions on how and why the various communities of practice affecting the EPQ function in the way they do and how their actions and decisions may have influenced its enactment, both directly and indirectly. From the researcher’s perspective, these are the data from case study research within which the ‘dynamics of context and their inter-relationships’ may be explored (ibid). Thus, to understand each centre and how it operates as fully as possible is vital in order to be able more confidently to address this study’s research questions. In addition, I have attempted to avoid making fundamental misconceptions about each centre’s enactment of their EPQ by constantly challenging and testing my own attitudes and assumptions against informants’ comments, and by probing the extent to which their opinions appear to be held universally, individually and/or by particular groups.

All adult interviewees offered observations and opinions on their centre’s culture and ethos, although student interviewees tended to be less forthcoming. From data analysis, ample evidence emerged to suggest that four main characteristics were common to all three institutions. Firstly:

“It’s about learning. It’s as plain and simple as that – it’s about trying to maximise your educational opportunities.” (Guy3)

For the Principal at SFC3, in order to build a really strong ‘learning community’ and a true passion for learning in both staff and students:

“You do nothing to disrupt learning. Everything has to support that.”
(Leanne3)

Secondly, the culture and ethos of all three centres was highly student-focused, with considerable emphasis placed on nurturing independence and independent study skills:

“I think the college expects students to do a lot on their own and the ethos is we don’t always set homework in lessons ... the onus is on the students to actually take that; and freedom for students of how exactly they go about, say, revising and consolidating their work – that’s a big part of it.” (Ravi2)

To this end, each centre had implemented suitable enabling strategies:

“We have quite high expectations of their out-of-class learning; we have very well-established electronic, shared systems that we expect students to access between lessons and, indeed, that’s the core of what we do for EPQs as well.” (Jenny3)

In SFC1, building students’ independent learning power was strongly linked to encouraging students’ intellectual engagement and to developing their resilience, “...almost like ‘future-proofing’ them” (Arthur1):

“I think there’s a kind of trust in the fact that the approach we’ve got to their learning is what will steer that to be successful, rather than something like a kind of ‘numbers game’ where you’re thinking, ‘Right, we’ve got to get them through!’” (Arthur1)

Both Harriet1 and Linus1 noted how the introduction of a teaching ethos based around pre-learning or flipped learning techniques had helped encourage students to take more control of their learning, perhaps more so than they had witnessed in other colleges.

Thirdly, many informants reported on the highly supportive atmosphere in their centre, linked to strong communication systems and positive relationships between senior management, staff and students:

“It’s a really lovely place to work as a member of staff and I think we’re really looked after and cared for here.” (Tanisha3)

“It’s all the support from your teachers as well. It’s just like everyone wants you to succeed and that’s just a great feeling.” (SFC2 student)

In SFC1, and particularly SFC2, the supportive attitude emanating from senior staff had helped to generate a ‘can do’, empowering ethos:

“So there’s certainly been an atmosphere of staff, if they have an idea, generally they can do it and they’ll be able to get support for that, which is good.” (Ravi2)

Whereas, in SFC3, an ethos of mutual trust and respect had evolved:

“We sort of have equality and fairness here. The way... for example, decisions about staffing, OK, are always made with huge amounts of consultation.” (Guy3)

Similarly, at SFC2, the Principal reflected on their ‘affiliative and democratic’ ethos, which was supported by a ‘fairly flat’ management structure:

“I would say, you know, people here know they can get on - and they’re accountable, they have to present what they’re doing and be open to scrutiny...” (Steve2)

Fourthly, interviewees from all three centres drew attention to the sense of high standards and 'high expectations' demonstrated by both staff and students, which meant that:

"We're always striving to improve practice." (Vernon2)

For example, at SFC1, the Principal noted how much stronger the level of staff commitment was to getting the curriculum and the whole student experience 'right', compared with previous years. Both there, and especially at SFC2, informants referred to the influence on whole-institutional pedagogical thinking of a range of theoretical approaches, including the work of Claxton and Dweck and the absorption/adaptation of attribution theory, transaction analysis, habits of mind and emotional intelligence:

"The way we did it, I think, was a good way which was to say, 'Look - kids are different; think about your practice and think about how you're setting up your lessons and avail yourself, you know, use, use...' Not variety for variety's sake." (Vernon2)

Regarding some of the more distinctive aspects of each centre's culture and ethos, it was interesting to note how SFC1's Principal described his student cohort as:

"...if anything, slightly lacking in self-confidence, slightly lacking in aspiration, slightly lacking in application." (Josh1)

This was unusual, compared with views expressed at the other two centres and with those of other SFC1 informants. However, as he went on to explain, it was perhaps more to do with what the centre 'inherited' than what it was 'cultivating':

"Students have been in education for a very long time before they come here and they're only here for a very short time. I think there are some of William Blake's 'mind-forged manacles' at work..." (Josh1)

A different perspective – but one again reflective of the impact of external contexts – was raised by an EPQ Supervisor at SFC3:

“It’s also, to my mind, heavily middle class as an institution. This location is a heavily middle class place – it makes it difficult...” (Guy3)

However, at SFC2, where the predominant culture was seen as one of enabling and sharing innovative teaching methods and good practice, “...not to do the same thing we’ve always been doing...” (Paul2), the ethos was also about the centre making a potential impact *on* their external context, and being a ‘community within a community’:

“...community is everything, the opportunity to be influential in an underperforming Borough – to transform life chances for 4-19 year olds ... that’s too good an opportunity not to look seriously at.” (Steve2)

Lastly, a further observation on SFC3’s distinctive culture was voiced by the Principal:

“Because we are a Level 3, academic college, very focused, we have the luxury of having a high level of specialisation. And that actually influences and informs the culture in terms of people...” (Leanne3)

Moreover:

“I think our ethos and values have changed little whilst everything else has changed around them ... [*they’re*] so deeply embedded that they are a constant influence on everything that comes along.” (Leanne3)

Many informants suggested factors that might be affecting or influencing the ‘feel’ of their centre, or that might become influential in the future. Not unexpectedly, the most commonly mentioned issue across all three centres was to do with the impact of external factors such as current or threatened financial cutbacks and constraints focused on the post-16 sector:

“All the time government sees education as a cost not an investment, we are going to be savaged...” (Steve2)

However, all three centres were resourceful and found ways of maintaining what they believed in. For example, SFC2’s ‘intelligent financial management’ (Ravi2) had prevented cuts in the CPD/development budget, benefiting staff and students. Similarly, at SFC3:

“Given the funding pressures we’re under, and we’ve had to reduce our programme, it’s becoming even more important that what we hang onto is the [*curriculum*] breadth – not just because we believe in it but, to be brutally honest, it’s also what might just give us a competitive edge over others, in an increasingly competitive market where we now can’t offer them 4 A levels.” (Naomi3)

Two further, potentially culture-changing issues were clearly concerning informants at all three centres. Firstly, the possible repercussions of proposed A level reforms and, secondly, the potential impact of Post-16 Area Reviews, combined with the effects of increasing competition with neighbouring colleges and schools. Again, centres were planning ways of turning these to their advantage; for example, SFC3 would be turning their enrichment programme into a ‘unique selling point’:

“We’re saying come to us because you can do all this other stuff – and we are branding the EPQ as our 4th subject, effectively.” (Naomi3)

FC2 has captured a wealth of information regarding respondents’ perceptions about their centre, sometimes made in comparison with other institutions, and their awareness of the impact on it of both internal and external factors. Several also commented on other communities associated with and influencing their centre, including parents:

“...the parents are very keen to support the staff. I wouldn’t say – ‘pushy’s’ not a word I’d use – but certainly ‘supportive’ and ‘responsive’... and they do come into events...” (Ravi2)

“We’re talking about an ‘intellectual powerhouse’ in this area ... so everyone in this area seems to think that education’s the way forward.” (Guy3)

In addition, many have provided invaluable insight into centre pedagogy and curriculum/enrichment provision, as well as possible factors – opportunities, limitations and threats – affecting the quality of EPQ enactment.

- **FC3: Locating the EPQ**

Further pursuing Ball *et al*’s contextual dimensions concept, and with a particular focus on ‘professional cultures’, FC3 draws together evidence regarding respondents’ knowledge of the EPQ learning programme – its function, purpose and the processes involved in its enactment – both within their own centre and further afield. In addition, it captures information on how and where this knowledge may have been obtained, given that it is of the type that has been developed or ‘encoded’ externally and has subsequently entered into the centre via various means. For the researcher, the data presented under FC3 has helped to root or ‘locate’ how individuals may have come to formulate their specific approach to the EPQ, bearing in mind that what they know is likely, at least in part, to depend on the role/s in which each actor is engaged. This in turn helps to cast light on the approach taken to EPQ enactment in the respective case study centres.

During interviews, respondents were invited to explain what they understood to be the purpose of the EPQ, both as a nationally available post-16 qualification and also regarding its role within their own centre. Not unexpectedly, some individuals were more knowledgeable than others, often

depending on their level of involvement and length of experience interacting with the EPQ. In addition, their knowledge was subject to the extent to which they had accessed the various sources of information available and the ways in which this may have occurred. For example, some of the externally-encoded information had been gained from documentary and web-based sources and also from direct interaction with examination board representatives. Other knowledge had been sourced via colleagues in universities and FE institutions and had therefore been subject to some amount of prior external interpretation, or decoding, before reaching the respondent. Knowledge of the purpose attributed to the EPQ programme internally had invariably been gained via the lead EPQ Coordinator, senior management or, in the case of student participants, via other subject teachers and tutors – and again, this information would in all probability have been subject to prior interpretation before reaching the respondent. Both external and internal forms of knowledge had been imparted through formal, ‘intentional’ circumstances – such as training, line management meetings or scrutiny of official, externally-supplied documentation and websites – or through ‘informal’ discourse between supervisors, students or managers, or via social media.

With regard to the purpose of the EPQ as a nationally-available qualification, a strong consensus of opinion emerged across all three centres that it incorporated five key objectives which in turn had helped to shape what respondents perceived to be some of its most distinctive features. Moreover, respondents were in agreement that such features caused the EPQ to be a fundamentally different type of programme when compared with other subjects, including A levels. Firstly, it offered an opportunity for students to develop **independent learning**, research and study skills far more intensively and consistently than in other courses:

"And I think that's really what changes it because most of the time you're in lessons, you're doing your own thing and it's not a teacher talking to you or telling you what to do. It's very... you have to navigate yourself and understand it." (Ivy2)

For many interviewees, the promotion of independent learning is one of the most distinguishing characteristics of the EPQ:

"Independent learning has been a part of our strategic thinking for a long time and this [EPQ] seems to us to be almost the best tool you can have to develop their independent learning. And real independent thinking as well – it's just doing it themselves." (Leanne3)

With support from their supervisors, students are expected to virtually 'teach themselves' and have the freedom to think on their own, to such an extent that:

"They've taken ownership. And the fact that they've taken ownership means they're much more committed to finding out and criticising, being self-critical and looking at opposing arguments." (Desreen2)

Several respondents described how a clear shift of responsibility from the teacher to the student is generated in this way, with the emphasis placed on moving away from 'being taught' by a "teacher imparting knowledge" (Linus1), to a relationship with their EPQ Supervisor where advice, combined with "university-style mentoring" (Leanne3) and facilitating, predominates:

"They're not constantly telling you that you need to redo this, that piece of work wasn't good enough or you haven't done this by a certain deadline ... they're more there for moral support than... as much as they know about the EPQ, they don't know about yours." (Kathy2)

As one supervisor observed:

“I guess it’s moving away from the pedagogic to ... the andragogic – the adult way of learning, isn’t it? It’s coming ‘from them’ which I think is definitely the key to it.” (Linus1)

For students at SFC3, the level of autonomy available to them in their EPQ studies was particularly welcome, even though it might hold implications for developing good time management:

“It’s something that you choose ... that you’re specifically really interested in, so you can learn about it and it’s not something you’d learn [*elsewhere*]. So it’s quite nice to be able to research it by yourself and go at your own pace when in class.” (Kitty3)

Ultimately, pursuing an EPQ provides students with the chance to become experts in their chosen field which, for two supervisors at SFC1, could be a strong motivational factor:

“I think that gives them quite a sense of pride and confidence, too. They’re doing the research – we’re not doing it for them. We don’t know it all at all. I think that’s actually quite a unique thing because everything else is imposed curriculum ... whereas here, apart from all the assessment criteria, they can really take it in all sorts of directions.” (Shane1; Erica1)

Or, as observed by the Vice Principal at SFC3, given that the EPQ has no set curriculum:

“I think one of the really fabulous things about the EPQ is it is a kind of golden opportunity to create your own a) curriculum, and b) qualification, and along the way to learn all sorts of things about yourself.” (Jenny3)

A second fundamental objective underpinning the EPQ’s purpose, and linked to the freedom and flexibility inbuilt into the course, was that students would

be able to pursue their **personal interests** through a recognised learning programme, and to receive formal accreditation for their efforts:

“And one of the requirements for actually getting the marks is that the motivation for doing it is sort of based on lifelong ambitions and plans and personal interests.” (Ravi2)

From the students’ perspective, this opportunity could reap unexpected dividends:

“...because they can see that something they might be interested in, even if it’s nothing to do with the subjects they’re studying, has got value in itself...” (Farida1)

“It sort of makes you make the time to do something that you’re interested in because, without it, you’re more likely to just want to focus on your other subjects that you have to do for A/S and A level.” (SFC3 student)

Informants from all three centres were keen to point out that the extensive opportunities provided by the qualification for student choice generally, was a particularly distinctive and much welcomed characteristic of the EPQ:

“They decide what they want to do and how they want to do it and so it’s the one thing where no-one is telling them they have to do this [*topic*] ... obviously, we guide them if it’s too wide or too small ... but they really, it is theirs...” (Farida1)

Indeed, it was something to be strongly encouraged in all three centres, and a particularly important influence on EPQ enactment at SFC3:

“For EPQ, anything goes and we will try and accommodate it – whatever the interest, we will try and facilitate it into being, or making it, a decent EPQ if we can.” (Naomi3)

Although, how to assess such an extensive range of projects could be challenging unless focused on standardised judgement of process elements rather than project outcomes:

“...we’ve got to have some structure by where we try to compare unlike with unlike, which is essentially what we’re doing with the EPQ here – comparing lots of things that are not the same.” (Jenny3)

A third objective noted by informants – and stemming from the previous objective – was that undertaking an EPQ could clearly enable students to **extend their learning** and skills proficiency in a number of different ways:

“It’s a good way to extend my learning of Business because that’s what I want to go into. And also because I don’t want to go to University – I want to do a Degree Apprenticeship – it will help with the Degree side of it.” (Linda1)

As one supervisor observed, students were often enthused by topics touched upon in their A level courses but which could not be explored in depth because of syllabus requirements or time constraints:

“Without the EPQ, you’d have no springboard for that enthusiasm.”
(Linus1)

For others, it could offer a chance to research something entirely unrelated to their other studies or to pursue a subject they enjoyed but would not be able to study post-16, other than through an EPQ. For example, one girl’s passion had been to work on steam engines as a hobby but she had been unable to find a course to help her learn more:

“I wanted to know about how engines really work because it’s very nice to work on them but you don’t actually understand how they really move and stuff...” (Kitty3)

Regardless of their chosen project topic, however, the EPQ would equip students with a broad range of transferable skills for the future, as well as softer skills such as organisation and time-keeping (Harriet1):

“It’s broadening their education and, hopefully, they’re taking away things they wouldn’t necessarily learn through their A level subjects. Skills like referencing, like finding the best sources of information...”
(Lois3)

“It’s all about the process! ... They don’t get assessed anywhere else in their ability to research, or their ability to develop skills.” (Naomi3)

For several informants, particularly those at SFC2, the EPQ not only helped to extend learning but could also promote the notion of blended and interdisciplinary learning:

“It’s of a piece – it’s holistic ... [*the EPQ*] gives an opportunity to say you know the world is... it’s a connected world, learning is connected. So actually you are doing [*a topic linking*] history, law and politics but there’s not three subjects there. We pretend they are but actually they’re connected.” (Steve2)

Several informants perceived as a fourth objective of the EPQ, the fact that it offered students a unique chance to **discover themselves** as individuals, in part because of the amount of independent study they would necessarily be involved in:

“Try and explore what you really want to do with this project because it’s all your work, you can do whatever you want. So I think you kind of, yeah, find out what *you* like and kind of do it – explore yourself a bit more.” (SFC1 student)

“I think you learn a lot about yourself as well. It’s learning about how motivated you are and ... if you have problems or anything, being able

to solve it yourself ... And then also like thinking on your own what you need to go out and do ... yes, you kind of discover yourself because you're kind of learning a lot about yourself." (Pam1)

For some, the flexibility of the EPQ and the focus on student choice permeating throughout the programme had the capacity to enable students to develop a love of learning and to become absorbed by being able to research virtually unrestrictedly into their selected topic:

"...to find a 'passion', or find what a passion is and really go for it."
(Harriet1)

The fifth of the key objectives raised by many respondents across all three centres, including students, was to do with the EPQ's capacity to **improve students' chances of attaining a university place** and of achieving success as an undergraduate because having a good EPQ grade would testify to a candidate's knowledge and ability in terms of research skills and project management. As such, they could: "...develop, and get ahead of the game a bit..." (Arthur1). However, one SFC2 supervisor added a note of caution in this respect:

"...because only very intellectually capable students do the EPQ in the first place. So you want to look at what grades they got at GCSE and A level and find out whether the EPQ has actually raised them *above* what you might have expected otherwise." (Paul2)

The majority were also aware that UCAS points were awarded for the qualification and that it was highly regarded by a number of 'good' universities, with some offering lower entry requirements for students with an EPQ:

"I picked it because Russell Group universities said it would look better on your application for university..." (Joseph1)

Respondents at both SFC1 and SFC2 also highlighted their perception of the EPQ as being a means of: "...bridging the gap from FE to HE" (Harriet1):

"...a way of connecting the university and college work and stepping up to that different way of working. And it also helps you to stand out."
(Tim2)

Interestingly, an issue relating to the wider community's perceptions of the EPQ's purpose, and its distinguishing features, was raised at SFC3. There, certain parents had struggled to understand the distinctive nature of EPQ assessment as being process- rather than outcome-driven – as, for example, in the case of a student who had produced a full-scale theatre production for her EPQ outcome:

"There was an amazing performance but really little paperwork that went with it. So, even if you'd given her the maximum marks for AO3, there was very little you could give her for the rest because ... obviously, process must have happened to some extent because the whole thing happened ... but she didn't score nearly as highly as she should have done because the process just wasn't there." (Jenny3)

Unfortunately, the student's parents had not appreciated the lower grade warranted by this lack of evidence, despite the excellent standard of the project outcome, and complained that the results were unfair.

When asked about their understanding of the EPQ's purpose in their own centre, respondents from SFC3 were generally the most forthcoming, describing it as being at the heart of their students' study programme and essential to one of the college's key aims of preparing them for employment and adult life:

"We think the EPQ develops the employability skills of our students in a way that almost nothing else that we offer does ... if you have an A or

A* in an EPQ, to me that really tells you about the self-motivation, self-discipline, organisation, time management, reliability, conscientiousness..." (Jenny3)

Originally, it was introduced to enhance students' extension and enrichment opportunities:

"...it really feels that it is part of what we believe is important to their learning – and much more so than the other courses we had in our extension before." (Leanne3)

In contrast, at SFC1, the EPQ was originally introduced as a means of extending learning for a fairly small group of gifted and talented (G&T) students. As the Principal observed:

"I don't think there was a great deal of awareness ... of what it was. So, when I arrived, I would have said it was a 'quirky', niche thing." (Josh1)

However, take-up had grown rapidly to as many as c.500 students per annum and the EPQ was now viewed as appropriate for students with a much broader range of ability, adding value in terms of their enrichment. Nevertheless:

"I think it's a great marketing tool, from SLT's perspective, for the more academically able students." (Harriet1)

At SFC2, where an internal, well-respected project initiative had long been established, the EPQ had been introduced in part because:

"...we felt that students were gaining a lot but it seemed a shame that they were doing all this work and weren't being recognised for it ..."
(Vernon2)

Moreover, the EPQ enabled access to a 'real' qualification with UCAS points, and the rigorous standard of marking imposed by exam boards. Since then, EPQ teaching and learning had been particularly influenced by Critical

Thinking, in that both courses encourage students to be more self-sufficient, to learn how to use and evaluate reliable sources of evidence and how to structure an argument (Ravi2).

- 4.2.2 Conceptual Theme B: Determining Attitudes & Opinions

In the title for Conceptual Theme B, 'determining' is interpreted in two different but interrelated and complementary ways. It encapsulates: a) *what* the informant determines to be their attitudes and opinions about the EPQ, based on their interpretation and translation of received knowledge and the mediating effects of the unique set of contextual dimensions surrounding them; and, b) *how* they perceive these attitudes and opinions may have been formed or 'determined'.

Five focused codes are grouped together here, all of which share aspects of this underpinning, two-fold meaning of 'determining': FC4: Interpreting and translating the EPQ; FC5: Making value judgements; FC6: Feeling uncertainty; FC7: Speculating; FC8: Identifying expectations and needs. It is worth noting that these titles express different types of action or activity in which informants may have participated (which in themselves reflect various contexts/contextual dimensions, thus illustrating the inherent complexity of enactment processes) and through which attitudes and opinions may have emerged and evolved over time.

Within the study's overarching Conceptual Framework, data collected under this thematic grouping tend to relate most closely to the second and third elements of the enactment process: firstly, 'interpretation' or 'decoding', and secondly, 'translation' or 'recoding'. However, it is important to note that although FC4 is entirely devoted to 'Interpreting & translating the EPQ', this

does not imply that examples of interpreting and translating have not been coded within other FC categories, both within Theme B and elsewhere.

- **FC4: Interpreting & translating the EPQ**

As discussed in Chapter 1 (1.2.2), for Ball *et al*, interpretation or ‘decoding’ is a situated part of the process of enactment, done in relation to contextual circumstances and influenced by the backgrounds, attitudes and opinions of its actors. It is to do with meaning-making, which positions and relates:

‘...institutional priorities and possibilities to political necessities’ (ibid: 44-45).

This definition, as argued previously, can apply equally well to learning programme enactment as to policy enactment and requires those engaged in the process, firstly to ask:

‘...what does this text [*or other EPQ-related knowledge source*] mean to us? What do we have to do? Do we have to do anything?’ (Ball, 1993; cited in Ball *et al*: 44)

Secondly, successful interpretation depends on there being opportunities for personal reflection and focused discussion to encourage ownership of ideas about the EPQ and its enactment in this instance. Translation or ‘recoding’, on the other hand, is about putting ‘into practice’ what has been interpreted: ‘...in relation to history and to context, with the resources available’ (ibid: 3). Both decoding and recoding constantly recur in various ways and, in line with the overall enactment process, they should be viewed as non-linear and non-sequential elements.

Evidence collated under FC4 is essentially to do with how and why the informants contributing to this study have made sense of the EPQ knowledge they have gained thus far, in light of the above definitions. It is about process rather than content: how individuals and groups perceive themselves and others to have interpreted ‘received wisdom’ about the EPQ, and have

adapted or translated it to best suit the unique set of circumstances regarding their centre, its learners, providers and stakeholders. Concerning interactions and interrelationships with contextual dimensions, evidence emerging from data analysis suggests that two conceptual categories tend to predominate during the process of interpretation/translation: namely, interacting with ‘professional cultures’ and with ‘teaching and learning approaches’.

During interviews, informants (other than students) were asked to consider the extent to which their centre’s culture and ethos was reflected in EPQ enactment, in order to gauge how much the former might be connecting with, or be evidenced by, the latter and thus, how well integrated, strategically, the EPQ had become. Without exception, individuals from all three centres were able to describe how they perceived such factors being put into practice *through* EPQ enactment. For example, at SFC1, all interviewees referred to the importance placed by the college on nurturing students’ independence, learning power and resilience, and viewed the EPQ as key to achieving these institution-wide goals with a sizeable proportion of the student cohort:

“What it is, is a chance to put into practice what students are being encouraged to do all along.” (Arthur1)

Moreover, the EPQ held several advantages when compared with the constraints of other courses, such as covering the syllabus and getting students ‘exam-ready’ in time:

“...so it is harder to let go of... hand it over to them ... Whereas EPQ, they have to be - as you say, it’s a long-term process – they have to show it over time.” (Erica1)

For Linus1, the notion of pre-learning was currently of prime importance to the college:

“...if that’s being filtered in on every single subject, cross-college-wise, the EPQ is singing from that same hymn sheet. It’s instilling the same set of academic values or expectations, so the two kind of work together, work in tandem.” (Linus1)

Similarly, SFC1’s Principal perceived the EPQ as “massively linked” with college culture:

“...because it fits in absolutely perfectly with the direction we want to take our learners to prepare them for their futures, to prepare them for their next steps ... the skills which sit within it and the process which is there, clearly have a benefit, whatever the destination of people.” (Josh1)

SFC2’s Principal was equally positive about the EPQ, describing it as:

“...fitting brilliantly into a college which prides itself on being student-centred, wants to encourage students and staff to take risks ... the EPQ gives them an opportunity to take the roof off learning and take it as far or wherever they’re able to take it.” (Steve2)

For him, and others at the centre, the EPQ was not only a means of developing independent learners and thinkers but also of realising the centre vision that:

“...learning continues beyond the confines of the classroom” (Paul2):

“That idea of it being limitless ... That’s something I know the college continues to do, and I think we’re pretty good at doing, which is pushing the students beyond the confines of the course. The EPQ, I think, certainly embodies those same values.” (Paul2)

Because of the freedom available to students to pursue their own areas of interest and to develop a wide range of skills, the EPQ was an ideal vehicle for encouraging students to extend their learning, accept a challenge and:

“...certainly do a lot more than simply pass their A levels and get to university.” (Ravi2)

In keeping with the other centres, SFC3 staff also highlighted the EPQ as a major means of promoting the college vision for student maturity relating to independent learning, thinking and enquiry – in this case, benefiting their entire student cohort:

“We do see ourselves as very much a halfway house between school and university or school and employment, so we’re looking for them to make that adult-width transition over the kind of 19 months that they’re with us, start to finish.” (Jenny3)

Further, in terms of their ethos:

“...we do have high expectations of our students’ motivation, independence and the quality of what they’re achieving under their own steam, which obviously fits really well with the EPQ.” (Jenny3)

For SFC3’s Principal, the EPQ was helping to fulfil her strategic plan of developing students who were innovative, creative and unafraid to learn through making mistakes:

“[It’s] encouraging them to push themselves out of their comfort zone. Not just staying within a comfortable area, where they could probably excel much more comfortably and easily, but really learning.”
(Leanne3)

Conversely, some informants were able to share ways in which they had perceived the philosophies, practices and procedures underpinning EPQ enactment gradually impacting on the development of their centre’s wider curriculum, as well as on college-wide teaching and learning approaches. For example, in SFC1 and SFC3, the direct involvement of senior managers as EPQ Supervisors and line managers had brought about a fundamental change of

attitude to learning which, in turn, had inspired their strategic planning and vision:

“And what the EPQ has taught us ... is that learning is a process, not an outcome. The EPQ absolutely personifies that... because so much of the marking is on process ... So we, in supporting the EPQ [*and*] being involved in the EPQ, the irony is that it’s now influencing how we’re working across the curriculum.” (Mary1)

Similarly, at SFC3, learning to work with students in a different way through the EPQ had clearly begun to influence institution-wide A level teaching and learning approaches. In part, this had come about through the centre’s policy of proactively making time for staff to share techniques and resources across curriculum areas (Leanne3). In addition, the strategic plan, based on EPQ practice, was to encourage staff creativity in the classroom in order to build more opportunities for 1-1 and verbal feedback:

“...we’re expecting quite a lot more of students outside the classroom and quite a lot more of what they can get through themselves. And peer assessment, peer review and marking are also becoming a really big part of the standard mainstream academic programme ... because we’re recognising the huge benefits that come from students really being active partners in the learning process.” (Jenny3)

Changes arising from external FE sectoral and curriculum reforms clearly constituted some major contextual issues taxing all the centres. Consequently, all three centres had ‘interpreted and translated’ the EPQ as appropriate for use by some students as a surrogate fourth A level, particularly in SFC3. Given its open topic choice, it could offset the impact of financial constraints and the difficulties of staffing minority subjects such as Archaeology or Classics:

“That need to satisfy that itch for whatever it is you’re interested in ... so they’re able to plug that gap of what’s not on the curriculum. The EPQ is really plugging those gaps.” (Desreen2)

Certain aspects of the programme had also been perceived as potential opportunities for addressing current internal priorities. For example, EPQ Presentation Events had been put to good use at SFC2 for enhancing relations with teachers in feeder schools, by inviting them along to witness the achievements of their ex-pupils. This move had simultaneously helped improve the centre’s publicity and reputation, whilst: “...potentially making it look more appealing to prospective students” (Ravi2).

In SFC2, EPQ Supervisors were keen to explain how their hands-on involvement with the programme had led to changes and developments in themselves when teaching other subjects:

“...as the Philosophy department is quite small, all three of us [*have*] started to adopt more independent approaches to study – and I think that’s probably been heavily informed by our experiences of doing the EPQ.” (Ravi2)

For some, the opportunity for reflective, focused discussion during their interview actually appeared to evoke interpretation in this respect:

“The EPQ students seem to almost stand out, [*knowing*] that that’s where they need to go, so I need to sort of transfer what I’ve learnt from EPQ to my Law students, whether it’s to be self-critical or to construct an argument and then counter-argue it.” (Desreen2)

From other interviewees’ comments, it was clear how essential it was to engage in this kind of interpretation and translation with regard to developing an appropriate portfolio of teaching and learning approaches in relation to

EPQ enactment. In effect, one had to change one's mind-set from that of a teacher to a supervisor/mentor/facilitator, and be able to think differently:

"I think you have to be quite open-minded ... to feel less responsible for progress than you would in a typical teacher-student relationship. So you have to be comfortable with uncertainty, because when [*students*] set off, they're not really sure what they're going to do and they're not really sure how they're going to get there." (Jenny3)

Moreover, in order to fulfil the role effectively, one must avoid intervening unnecessarily, learn to ask the right questions and know when to: "watch and wait" (Jenny3). Students, too, had learnt to adapt and not to rely on: "...how good the teacher is or the environment that you're in" (Sam2), in order to get the best out of their EPQ experience:

"You're all doing something different and ... you couldn't do your look into that [*topic*] anywhere else, academically. So, you kind of make up what you're doing... it's not a set curriculum where you need to learn this, this and this. *You* decide what you're doing yourself." (Kathy2)

Finally, informants also described ways in which they had found it necessary to adapt the EPQ learning experience to better suit the needs and circumstances of its participants and contributors. For example, at SFC3, early experience of one exam board's interpretation of the EPQ specification had led to their changing to another which fitted more comfortably with the centre's ethos:

"It was quite liberating, with the right type of structure, recognising you do have to have an assessment of process as well as assessment of content." (Leanne3)

These data have provided insight into how the EPQ learning programme has evolved over time in each centre, how it has been understood and how individuals and communities have interacted with it and with each other.

Evidence has shown how the inter-related processes of interpretation and translation constantly take place within and across different communities, and not solely at senior management level. New knowledge is gained by respondents, and older traditions replaced. Thus, the EPQ programme evolves as long as those involved in its enactment are sensitive to change, willing to embrace the challenges and/or opportunities arising, and prepared to adapt accordingly.

- **FC5: Making value judgements**

Value judgements made by the various informants have been helpful for indicating to the researcher the level of significance, merit or usefulness attached by individuals and groups to a topic discussed during interview, either in direct response to a scheduled question or entirely unsolicited but about which they wish to share an opinion. On occasions, however, comparison with data from other sources such as observation of the same informant/s in another context, or even comments made by other interviewees, has suggested that a different attitude or opinion may be held, perhaps even diametrically opposed to that stated during interview. Therefore, value judgements should perhaps be treated with caution because, however strongly and passionately they may be expounded at the time of interview, they can be just as quickly rescinded or altered, due to emerging new information, new experiences or changing circumstances. Thus, they can be seen to form an integral part of the interpretation and re-interpretation elements of EPQ enactment.

Value judgements relating to a broad range of contextual dimensions were made, and pertained chiefly to three areas. Firstly, the centres and aspects of centre culture were scrutinised by many, as illustrated in the evidence presented previously under FC2: Locating the centre. Some respondents were clearly passionate about their respective institution:

“I think it’s a very healthy culture and ethos. I think, generally speaking, it’s a ‘can do’ kind of place – and it’s a ‘support’ kind of place where I think the interactions between staff and students are probably amongst the best I’ve ever come across in five colleges.” (Josh1)

And also about its culture:

“I hope that people would say it’s a really strong learning community ... I do think there is a lot of passion for learning amongst students *and* staff. I think staff see themselves as learners as well as students and I really do think there is a strong commitment to relationships, respect and learning...” (Leanne3)

Moreover, it was recognised how the ethos of a centre could help to enthuse and inspire its communities:

“I think one thing that makes a difference is how teachers are dealt with; so, we have reasonable opportunities to talk to each other about the teaching methods we’re using, share good ideas, share good practices.” (Paul2)

Secondly, those involved in EPQ enactment came under scrutiny. At SFC2, for example, students discussed how they perceived and valued their relationship with EPQ Supervisors. For some, there was little difference between that and their relationship with other subject teachers. However, for the majority, the level of moral support and guidance available – especially outside lessons – tended to be a distinguishing and valuable factor, given the EPQ’s requirements. Supervisors treated one in an adult way:

“They’re not constantly telling you that you need to redo this, that piece of work wasn’t good enough or you haven’t done this by a certain deadline...” (Kathy2)

These sentiments were echoed strongly by SFC3's student group, who agreed that:

"Your supervisor is more there to help you with the guidelines of the project than with the content itself ... So if you weren't sure really what the diary [PPR] is for, then she's really good to guide you through that; or if you weren't sure how to reference all of your sources..." (Kitty3)

Interestingly, opinion was somewhat mixed as to the qualities required of people recruited to the role of supervisor. For example, whereas the Vice Principal at SFC3 held firm ideas as to the kind of mind-set she looked for when recruiting supervisors (see FC4), a supervisor at SFC2 commented:

"Anybody can... I don't mean to say it's not a job that has, that you can be good at, but anybody can supervise the EPQ. And I think the more people in college who get a chance to do it, the better." (Paul2)

However, for Tanisha, a supervisor at SFC3:

"Tim, I think he's a really good EPQ teacher because he's just got that broadness of knowledge and skill when it comes to assessment. I don't feel so confident when it comes to assessing the essays – you know, I think I'm still learning how to judge a good, strong essay. Well, he can spot it straight away." (Tanisha3)

With regard to the lead EPQ Coordinators at all three centres, value judgements expressed were overwhelmingly positive, for different reasons:

"I mean, Naomi's organisation of the moderation process is really, really strong – it's really good – so there's a lot of confidence that we're in the right zone!" (Guy3)

And because of varying, but unerringly constructive outcomes:

“I mean we’re very lucky here that Harriet¹ has set up the system in such a way that it’s very clear. It’s very obvious what everyone has to do – so the ‘roadmap’ through is very, very clear for the students.”
(Linus¹)

“But any queries – and I’ve had quite a lot – Ravi² has addressed, and of course he’s been phenomenal in that, actually. So, I don’t think all centres would have anybody so supportive.” (Desreen²)

Thirdly, aspects of the EPQ learning programme, its delivery and overall quality were considered (see also evidence in FC3: Locating the EPQ). For example, a group of SFC1’s students criticised the structure of the EPQ, particularly the validity of maintaining a Project Progression Record (PPR), in that:

“...you write what you’re going to do and then you can just go back and change it so it looks like you’ve done what you planned. And, like the skills, you can just make it up...” (SFC1 student)

A second student described this as: “...like you’re planning your planning...”, whilst another questioned the value of constructing a timeline when she knew she would not stick to it. Nevertheless, the group also pointed out that, in all fairness, they had received limited guidance in these matters, due to supervisor absence. Indeed, at least one felt that acting in this way would be tantamount to cheating, given the EPQ’s specifications.

With regard to the quality of resources supporting the EPQ, one SFC3 student was surprisingly critical of the EPQ-dedicated SharePoint website, particularly considering the amount of staff effort put into its development. However, further probing clarified that her judgement had primarily arisen from poor communication from her supervisor as to its purpose and content and that her opinion and was not supported by others:

“I found all of the stuff on SharePoint quite helpful because, when I wasn’t sure what kind of questions I should be including in my survey – or what makes a good survey – it was quite handy just to be able to go, ‘Oh, that’s a good style of question’ or ‘Well, maybe I shouldn’t include that’.” (Rachel3)

On the other hand, the group expressed universal negativity as to the value of their centre’s library and its resources – in sharp contrast to opinions at the other two centres; again, this appeared to result from poor communication as to its potential benefits and the likelihood of being able to find information supporting their specialist topics:

“The library was never really suggested ... because we were always sat at computers when we went into our EPQ lessons and the teachers never said, ‘Oh, anyone want to go to the library to see if they can get any books?’ So it never sort of seemed appropriate.” (Rachel3)

In terms of the quality of external factors, SFC2’s lead EPQ Coordinator commented on the difference between requirements for dissertations specified by two exam boards. One was very specific as to how student should present their work, whereas the other offered more freedom to make decisions for themselves. However, although this was welcomed:

“...potentially, it might lead to a lack of direction and more work being needed from supervisors to sort of give them a bit more of a push in the right direction.” (Ravi2)

- **FC6: Feeling uncertainty**

Evidence grouped within this focused code tends to exemplify both aspects of ‘determining’ associated with Conceptual Theme B, in that: a) when an informant expresses some measure of ‘feeling uncertainty’, they are invariably describing an attitude or opinion about the EPQ and their interaction with it;

and, b) by 'feeling uncertain', the informant is simultaneously describing a particular way in which they are engaging which may assist, ultimately, in the formation of their attitudes/opinions. The term infers that they may not have yet made up their mind about some point relating to their or others' involvement in the EPQ, or their centre's enactment of it.

When interviewed, few informants tended to express uncertainty, especially the students, with most appearing both clear and decisive in their thinking around the EPQ (the serendipitous nature of sample selection for this study could have been a factor in this respect). It is possible that finding themselves in an unfamiliar 'interview' situation might have deterred some from sharing any uncertainties for fear of revealing what they perceived to be a weakness in themselves, or prompted others to provide a definite response in the belief that this would 'help' the researcher. Nevertheless, findings within FC6 are undoubtedly useful for providing insight into areas in which uncertainties may be lurking, and which could be key factors as to why some centres are more successful than others in terms of EPQ enactment.

During data analysis, it became apparent that respondents were feeling uncertainty with regard to three particular issues. Firstly, the uncertain future of the EPQ in a time of radical, post-16 qualification and curriculum reform:

"Because, like all things, these things are subject, you know, to government initiatives and educational change, and whether EPQ itself will need to change... how will *it* be viewed as we move into this new A level system, I don't know?" (Farida1)

For Farida1, an experienced SFC1 supervisor, national education policy changes held implications locally for the long-term growth and sustainability of the EPQ, a concern similarly voiced by her Principal when considering whether students in his centre not planning to progress to university should still be encouraged to take an EPQ:

“I think, arguably, the government’s agenda that they’re looking for evidence of work experience and skills, has slightly interrupted the idea that you do that through an Extended Project.” (Josh1)

He was further uncertain about the suitability of the EPQ itself in this respect:

“I would be very interested if it could prove to be an umbrella for engaging with employers for students who are not going to university but I’m not sure, with the sort of bureaucracy which is linked with the qualification, whether that is ever really going to happen without some kind of reform...” (Josh1)

Another Principal (SFC3), however, expressed uncertainty with regard to external contextual pressures, such as the potential impact of post-16 Area Reviews on her college’s ability to sustain its EPQ offer, although she remained overwhelmingly optimistic, given her centre’s ethos:

“I mean you can never say ‘Never!’ because you don’t know what external pressures and other things are going to come upon you – but I do think that we’ve hung on desperately, despite all the funding pressures, to our enrichment extension curriculum, and I’m convinced it makes a difference.” (Leanne3)

Secondly, some respondents felt uncertain regarding their centre’s approach or expectations with regard to EPQ provision and practice. As a new EPQ Supervisor observed, this had led to confusion as to how she should carry out her new role:

“This has always been rather blurred because I was told really I should step back quite a lot and let the students get on with it. And, of course, that’s quite a difficult thing to do as students still need guidance. Supervisors at undergraduate level provide quite a decent amount of guidance.” (Desreen2)

Interestingly, SFC2's lead EPQ Coordinator was also uncertain about how to fulfil his role for the benefit of the students, without clearer guidance:

“What's really difficult is providing resources from within the college for some of the more ambitious projects and, again, I don't know what ... I've got no idea how to deal with that.” (Ravi2)

Significantly, this was also proving to be a dilemma for the Principal at SFC3:

“I think some of them [*EPQ candidates*] have spent a lot of money and it is a worry because ... I don't know how we resolve that. We make it clear that ... once they've got to something that looks professional, they've got everything there. You know, they've actually 'done it' and they don't need to go that extra step. But by then they so want to keep it, they want it to look great...” (Leanne3)

The third aspect to cause uncertainty related to dilemmas arising from differences between respondents' professional practices, beliefs and values and how to fulfil the EPQ's formal qualification requirements. For example, one supervisor had endeavoured to establish a balanced approach for his students, but:

“As soon as you start to formalise it more, though, and say: 'You must do this, this and this!' – tick box thing – you sort of destroy some of the inventiveness of how much [*students*] hand in. But if you don't do that, you end up with situations where people don't look at all the evidence that's there.” (Paul2)

Finally, for all three centre Librarians, uncertainty had arisen as to how best to fulfil their role as contributors to the EPQ programme, given that different students would always be at different stages in their studies and therefore needing different types of support:

“Whether it needs to be formalised or not would be the question. I mean, obviously there will be points anyway where they’re not sure, and support from us can assist in that respect, so... It’s the distinction between whether we kind of... I’m not sure that it needs to be a kind of rigid structure where we say, ‘Right, we’re coming to talk to you about this on this day’.” (Arthur1)

Clearly, there is a possibility that uncertainty of this type may have been caused chiefly by a lack of factual knowledge or personal inexperience regarding the EPQ at the time of interview – factors which, once addressed, could enable the respondent to revise their uncertainty in favour of making a clear, informed decision.

- **FC7: Speculating**

Evidence to do with ‘Speculating’ is similar to that gathered under FC6: Feeling uncertainty, though not entirely the same in that it has less affinity with the second interpretation of ‘determining’ as described earlier. In effect, an informant might be driven to speculate *because* they are feeling uncertain about an occurrence or issue related to the EPQ, for example, but they do not *need* to speculate in order to help them ‘form’ the particular attitude or opinion they should hold about it. Rather, they may actually be building their speculative comments around an already strongly-held opinion which is based on extensive knowledge and/or experience, as demonstrated by the Vice Principal’s observation on EPQ achievement at SFC3 (where the EPQ is compulsory):

“As a cohort, I guess our achievement is much more spread than a cohort typically submitting for EPQ where you’d be submitting many more only at the higher end. About 50% of ours get an A/A* out of it, but obviously we have a tail of students that just haven’t got on with it so well.” (Jenny3)

Speculation often occurred as respondents reflected upon the possible impact of various contextual dimensions on EPQ enactment in their respective centres – and vice versa. Thus, the nature of ‘situated’ student cohorts, such as the Nepalese minority at SFC2, was considered in relation to the ability of the EPQ to cater for different participant needs:

“It would be conjecture but I think it’s not being aware of the value of it, maybe? Not seeing it – so maybe they just [*have a*] more traditional, vocational outlook, so a lot of the Nepalese students will often do more vocational courses ... It might [*also*] be because there’s fewer Nepalese students who are achieving the kind of grades that would normally be achieved by the people who would do the EPQ.” (Ravi2)

In both the centres where the EPQ was optional (SFC1 and SFC2), there was open recognition that it was more likely to be chosen by A level students, especially those planning to go to university (Josh1):

“I’m not sure it kind of suits the students who aren’t on a kind of HE pathway – I think some of them get left behind.” (Linus1)

However, there was scope for attracting a wider range of abilities to the programme if the centre’s ‘teaching and learning’ context could be adapted:

“Perhaps ... using case studies to show that students have done this [*EPQ*] and haven’t gone to university ... and the successes they’ve had. And you can almost have like a ... podcast of them reflecting on it and talking about the worth of it that can be used by the tutor to encourage non-academic applications.” (Linus1)

Moreover, the EPQ could be used to offset a centre’s challenging ‘material’ contexts:

“...the idea that people can study a subject that may not be on the college list I think would be very appealing ... we’ve had enquiries from

students who want to study specific subjects but can't and we can say, 'Well, we do have the EPQ – yes, you can'." (Desreen2)

Similarly, if a centre might be persuaded to revise their financial investment in the course, this might help improve student motivation and retention:

"They [*students*] don't obviously get any funding [*for their projects*] unless they've organised it themselves – that could inhibit what they do and how they do it. If there was funding for things, I'm sure for students doing their research that would make a big difference."
(Harriet1)

Interestingly, one respondent speculated upon the positive impact that aspects of the existing professional culture/teaching and learning context in their particular centre may well have made on the status and reputation of their EPQ:

"I maybe don't know but perhaps, going back to this idea of pre-learning and things like that, as [*the EPQ's*] in kind of the spirit of that, maybe there's been more sort of positivity towards it?" (Linus1)

However, in SFC2, the lead EPQ Coordinator speculated on why some subject staff appeared more reluctant than others to become EPQ Supervisors:

"Sometimes, with staff, it's convincing them that they don't have to know about the subject. For some reason, I think Maths have got their own interests and they don't want to lose staff ... But ... there's [*also*] this sort of perception that it's not appropriate that Maths teachers should be running the EPQ and ... whether there's wilful failure to recognise the nature of it or genuine ignorance, I'm not sure." (Ravi2)

On the other hand, SFC3's Vice Principal conjectured that the key to successful EPQ enactment fundamentally lay in the strong support of senior management:

“I think it’s quite hard, if you’re introducing the EPQ and you’re an enthusiast but otherwise you’re 2nd in Geography ... you’d probably get so far with it, but it wouldn’t necessarily embed itself fully across the college in the way that ours has, without senior management support.” (Jenny3)

Another area on which respondents tended to speculate was to do with how changing ‘external contexts’ might hold implications for centres’ existing EPQ procedures. For example, SFC1’s lead Coordinator wondered whether A and A/S level reforms might impact on the timing of their EPQ. It might have to begin sooner than the Y12 summer term, even though: “I think, maturity-wise, the students aren’t always ready for it...” (Harriet1). For the Principals at both SFC1 and SFC3, however, the concern was more to do with whether post-16 curriculum reforms and the potential reduction of student study hours might: “...water down the breadth and the richness of their studies...” (Josh1), and, consequently, reduce their ability to continue to sustain and ‘grow’ the EPQ in their centres. Even so, the decision already taken to limit SFC3 students’ study programmes to three A levels and an EPQ in Y12 could have considerable benefits for students and staff:

“...because [*now*] there are limitations on their time and they’re all busy preparing for A/S levels and they’re not interested in the EPQ right now. And it’s quite hard – you’ve then got to get them back in and motivated to do it over the summer, which can be quite tough.”
(Naomi3)

Finally, several respondents speculated on ways in which they might be able to improve the quality and effectiveness of their EPQ programme, taking into account the diverse range of contexts with which they interacted in their particular setting:

“I think a lot of the parents have particular skills and occupations and maybe we should be tapping into that more, and creating more opportunities for people to go into the workplace or have work experience. And maybe the parents would be a good way of doing that?” (Desreen2)

For SFC1’s lead EPQ Coordinator, a future priority might be to market the EPQ more effectively in the centre in order to increase staff awareness of its benefits, whereas her line manager was keen to see better EPQ marketing taking place nationally, via the press and all universities:

“...but my only fear of that is then, for the students, it becomes almost something like a ‘tick-box’ and a, ‘Well, I’ve got [*an EPQ*] so I can get in’.
(Mary1)

For the researcher, capturing those occasions when a respondent has indulged in speculative ‘blue sky thinking’ has not only helped me gain an insight into that individual’s character, but has also challenged my assumptions as to ‘why things are’ with regard to the EPQ in each centre, and how its enactment may be set to continue.

- **FC8: Identifying expectations & needs**

The final focused code within Conceptual Theme B represents some of the outcomes from respondents’ use of two inter-related forms of action, both of which can help support the processes of interpretation and translation. Firstly, individuals have sought to identify and share with the researcher their expectations of the EPQ learning programme, and of the people and circumstances associated with it. Secondly, a number have contributed insights into what they understand about their own needs and priorities regarding the EPQ, as well as those of others involved in its enactment. The majority of these types of comment relate to perceptions about EPQ students and to what

students and staff perceive about EPQ Supervisors, with some additional evidence relating to the expectations of external partners and EPQ support systems.

For EPQ Supervisors across all three centres, expectations held for their students chiefly related to their capacity to accept that the EPQ 'journey' they had chosen to follow would consist of a fundamentally different and unfamiliar way of operating:

“One of the things they’ve got to take on board is this idea of the process. In everything they do, it’s all about outcomes and results, isn’t it, really?” (Shane1)

“They have to understand that the moderator never meets them so they have to show... they have to evidence [*their work*]. And I think that’s the bit that they find hard to get their heads round.” (Tanisha3)

Both supervisors and senior management held high expectations of EPQ students’ independence, even though this might be challenging for some:

“...and wanting to see them ready to progress, really, to the next step – and we see the EPQ as such a good vehicle to demonstrate to them what we mean by that, and what that looks like, because it’s easy to say but it’s much harder to do.” (Jenny3)

Moreover, where the EPQ was optional:

“A lot of the [EPQ] students have chosen to do three different extra-curricular activities *and* four A levels, and it’s their responsibility to make it work.” (Ravi2)

In practice, this meant that supervisors were expecting students to show initiative and resourcefulness when selecting and researching their project topics, and not to shirk their responsibility, especially during the summer

vacation (Mary1). However, maintaining good standards of record-keeping and consistent communications with their supervisors were also essential:

“We expect them routinely to share documents with us through SharePoint, so we all organise it through that medium ... And I always remind them at the end of every session to make a diary entry ... far more powerful than trying to cram everything in at the end...” (Guy3)

The students showed themselves to be not unaware of supervisors' expectations which, in several cases, clearly tallied with their own:

“They just expect you to get on with it. I mean, they'll obviously check up on you but they can't force you to do the work – so it's definitely a lot more up to you.” (Tyrone3)

Nevertheless, from the comments made, it was evident that many adult informants understood the pressures that could arise from undertaking an EPQ. For example, the Librarian at SFC1 had recently noted students' responses to research skills sessions in which he had introduced a flipped learning approach:

“I don't know if that wholly completely works with EPQ, to be honest... the students are a bit nervous about doing it ... there's a sort of reticence to speak out about their examples sometimes – they hang back a bit.” (Arthur1)

Similarly, informants were empathetic to the needs of particular individuals, such as very able 'perfectionists':

“They can get three-quarters of the way through and, because they realise that what they're doing is not going to change the face of neuroscience, they think 'Oh, I'm not going to do this. I can't be bothered any more – I'm not good enough, I'm not going to finish it'.” (Ravi2)

They were also conscious of the impact of external contexts on students' motivation:

"A lot of the students have been frustrated about their ability to get replies from academics and ... I've spoken to students about the best approach and explained that academics are really busy ... so it's quite a big 'shout'..." (Desreen2)

Moving to the students' perspective, discussion at SFC1 and SFC2 focused particularly on their expectations of how supervised EPQ sessions should be conducted. The consensus of opinion in both centres appeared to be that supervisors should be available for support both inside and outside the classroom and should ensure a clear structure for all sessions, with opportunities for monitoring progress and giving feedback, although:

"...we would all like a 1-1 but I don't think it's necessarily super-integral for us ... since it's an independent project, we can try and get all the help ourselves." (SFC1 student)

SFC3 students also pointed out that they did not expect their supervisors so much to guide them on their actual project content as to mentor them through the EPQ process:

"They can't actually teach you how to write a case study on Cambodia – it's down to you." (Brian3)

Comments capturing supervisors' own expectations for themselves particularly related to the importance of providing good communications and positive, motivational support systems:

"The standardisation meetings are really helpful ... so you can pick up quite quickly if someone's over- or under-marking and what's going on. But it's always done in a really supportive way..." (Tanisha3)

Lead EPQ Coordinators had addressed these expectations in various ways, including buddying and staff drop-in sessions (SFC1), regular meetings for briefing and sharing practice (SFC2), and an 'open-door' policy for supervisors and provision of flexible resources (SFC3):

"I would produce centralised 'This is what you can do on any given week' [*lesson plans/PPTs*] but it's totally up to them whether they use it ... Because the idea is meant to be not to increase their workload."

(Naomi3)

In addition, Coordinators were conscious of the importance of maintaining appropriate relationships in order to encourage those who may be struggling with the idea of the EPQ and their role within it (a common issue, also noted by Naomi3):

"...to deal with staff in a non-threatening way which doesn't make them feel too pressured or anything, making them feel relaxed, making them feel they're not overworked." (Ravi2)

For one supervisor, the students' expectations had clearly influenced what she expected of herself in the role, despite having a full-time teaching load:

"I've got a huge list in front of me now of EPQ students who've sent emails ... they just want to check something about referencing or whatever it is ... Obviously, you can't do it for them but you want to be a supportive supervisor ... And it's just achieving that balance of being highly supportive but not sort of stepping over, really." (Desreen2)

Interestingly, several informants referred to the expectations of external partners with regard to the EPQ. For example, at SFC2 and SFC3, not all parents were aware of its value and purpose and some had objected to it:

"They are struggling with, in a sense, the new norm and the message of the college which is, 'Look you don't need to do 4 A levels – do 3

subjects plus an EPQ and a bit of volunteering and work experience', because that's a much stronger CV than doing qualification on qualification on qualification." (Steve2)

Also at SFC2, a supervisor referred to the expectations of the centre's chosen awarding body for the EPQ. For him, there was a need for greater clarity as to the amount of evidence that candidates should be supplying to support their project outcomes:

"In principle there's nothing you can't submit – because you submit what you submit – but... and I don't know whether that's something that bothers exam boards." (Paul2)

In addition, he questioned some of the expectations underpinning the marking criteria for projects, given that students were required to show how the EPQ would benefit them in terms of skills development, employability or further study:

"...what [*the students*] have now got to do is ... to go through this rigmarole of proving that it had some kind of utilitarian value for them when actually maybe they did it because they love physics?" (Paul2)

Finally, with regard to informants' expectations concerning EPQ provision, it was particularly noticeable that the Library/LRC representatives from all three centres expressed very similar sentiments, despite their engagement with the course varying considerably in its intensity (SFC1 = high; SFC2 = medium; SFC3 = low). Specifically, they expected to be a major resource for all EPQ students and supervisors but felt that the support they could offer needed to be more firmly and consistently embedded within the course – and better understood:

"I don't know, with some students there's a brick wall and it's 'I'll just go on the internet – I can find what I need on there'." (Lois3)

“So it’s that making students aware that there’s this wider support beyond the supervisor – and they can’t all go to Ravi!” (Enid2)

Evidence from informants gathered under FC8 has provided an important source of information for the researcher. The findings have helped to clarify why respondents hold the attitudes and opinions on EPQ enactment they do, by indicating some of the underpinning influences steering formation of their perspectives. In addition, they have helped shed light on individuals’ levels of engagement and commitment to the programme. This is useful background evidence against which to set in context other data provided by the same respondent, potentially adding reliability and validity to one’s deductions.

- 4.2.3 Conceptual Theme C: Acting & Interacting

The title, ‘Acting & Interacting’, clearly denotes Theme C’s relationship with the fourth element of the Conceptual Framework – ‘Operational practices and procedures’ – which, in turn, owes its origins to the work of Bell & Stevenson (2006; 2015). Only three focused codes are grouped here: FC9: Participating in the EPQ; FC10: Managing EPQ demands; FC11: Reviewing and evaluating. Within each is gathered evidence of what respondents say they are actually *doing* and *being* in relation to the EPQ, as well as what is *being done* to them, together with their opinions on these actions. Thus, they are commenting on their experiences, and their observations of others, when acting and interacting as both ‘receivers’ and ‘agents’ in the context of the EPQ learning programme (Ball *et al*, 2012: 49). As noted earlier, what happens during the operation of the EPQ is constantly subject to change over time, and can also prompt change. In addition, informants’ comments may reflect and be influenced by the type of role in which they are acting at a particular time (see Section 2.3.3), bearing in mind Ball *et al*’s observation that ‘actor’ categories – suggested to comprise narrators, entrepreneurs, outsiders, transactors,

enthusiasts, translators, critics and receivers – should not necessarily be attached solely to any specific individual and that any enactment participant can assume a number of roles whilst interacting with colleagues (ibid: 49-50).

- **FC9: Participating in the EPQ**

The evidence gathered under this focused code compliments that supplied by research informants coded earlier to FC1: Locating self, along with FC8: Identifying expectations & needs. Undoubtedly, there are a myriad of ways in which different respondents might be said to be ‘participating in the EPQ’ in their centre, and it would be impractical to attempt to present a comprehensive record of all types herein. In any case, data regarding some participatory actions may not be available because the topics have not been raised during any of the interviews, either through chance or because no interviewee had deemed them sufficiently important or relevant at the time. Data presented within FC9 is selected from the second largest amount of information gathered under any of the sixteen focused codes, the first being FC4: Interpreting & translating the EPQ. It both helps to clarify what individuals are doing – or perhaps not doing – within the context of EPQ enactment, and also to shed light on their role/s and how they play them, both individually and collectively. From the researcher’s perspective, through constantly making comparisons between data provided during interviews and findings emerging from other fieldwork sources (for example, centre-specific documentation describing the EPQ), it has been possible to verify more accurately what takes place in each case study centre and thus, on several occasions, to avoid jumping to incorrect conclusions.

During interviews, respondents were asked to describe their roles and responsibilities with regard to EPQ enactment and to outline what, if any, additional contributions they were making to the programme. For EPQ

Supervisors, the majority interpreted their role as multi-faceted, being a combination of facilitator, mentor, guide and, to some extent, gatekeeper:

“I mean, we’re really there as a kind of a safety net, I suppose?”

(Jenny3)

Thus, it was quite different from the ‘usual’ role of the teacher, as:

“...you are much more promoting the independent learning and encouraging *them* to develop the skills they need.” (Farida1)

Across the three centres, a relatively similar range of supervisor responsibilities was mentioned. Some were directly linked to the different stages and requirements of the course, such as marking, moderation, teaching research skills, providing guidance on the Assessment Objectives and practising students’ presentations:

“I think the key one at the beginning, actually, is just steering them towards *them* making sure they’ve got a viable choice [*of project topic*] ... they can communicate and convince me that it’s going to be something they can sustain in terms of their own independent learning.” (Shane1)

Other responsibilities highlighted were to do with making use of appropriate teaching and learning techniques throughout the course, as well as making efficient use of bespoke online resources for the EPQ. Examples of tried and tested methods included: regularly setting targets and deadlines for and with the students to keep them on track (Erica1; Guy3); monitoring student progress through 1-1 mentoring meetings (Desreen2); facilitating peer assessments in order to encourage them to support and learn from each other (Tanisha3); and, modelling the process of effective project production: “...by showing them examples of projects from previous years” (Paul2).

A further group of responsibilities, raised by several supervisors, related to providing emotional support, or “enthusing” (Guy3), and encouraging the students in order to sustain their resilience:

“It’s so easy for them to get despondent or look for a way out because it’s too much. So it’s being very, very positive, I guess, in terms of your presence as a supervisor.” (Linus1)

Supervisors were conscious that they needed to be flexible and adaptable in their approach, given that different students had different needs, and to be sensitive in their interactions:

“You have to do it in a way where they feel like you’re interested in their project, you care about what they’re doing, you can see where they’re struggling and you help them *without* telling them what to do.” (Tanisha3)

Most of the EPQ Supervisors interviewed had undertaken additional responsibilities to support the programme. These ranged from running sessions for students on how to make a successful project presentation (Farida1), to redesigning and maintaining the EPQ-dedicated website at SFC3 (Tanisha3), sharing resources and good ideas with colleagues (Paul2; Farida1; Tanisha3) and participating in the moderation of completed projects (Guy3; Shane1; Linus1). Of all the centres, SFC3 was perhaps the most noticeable for promoting a culture of distributed leadership in this respect; for example, Tanisha had represented the lead EPQ Coordinator at an externally-run EPQ forum and Guy3 had advised her on moderation:

“I got quite a few projects given to me to have a look through and moderate back to Naomi3, as well as taking part in the moderation process.” (Guy3)

Finally, two of the three senior managers involved in supervision (Mary1, Leanne3 and Jenny3) made a considerable additional contribution to the programme. At SFC1, Mary1 was responsible for assigning students to generic or specialist EPQ groups as well as for timetabling supervised lessons, and liaising with Department Heads in relation to supervisor recruitment. Moreover, her role comprised task managing Harriet1, line managing the Library/LRC, and managing the college digital strategy and staff development programme. Consequently, she was ideally placed for building the EPQ's profile and for accessing resources to sustain its growth. Similarly, as well as line managing SFC3's lead EPQ Coordinator, Jenny3 was responsible for long-term strategic planning and programme development, including the move to making the EPQ compulsory, and for monitoring student progress. In particular, because of her role as Vice Principal, she was also able to build a very high profile for the EPQ, both internally and externally, and to secure its future as far as possible.

Of the three centre lead EPQ Coordinators, only one (Ravi2) had been able to combine his role with that of EPQ Supervisor. For Naomi3, managing a cohort in excess of 1,000 students allowed no time for supervising, whilst, at SFC1, timetable constraints had prevented Harriet1 from supervising, despite her desire to do so. In terms of responsibilities mentioned (the selection may have been influenced by what was happening at the time of fieldwork), all three respondents highlighted four key aspects of their job. Firstly, the **training and support** of new and experienced supervisors throughout the course, whether to prepare them for marking, standardisation or moderation, or for the purposes of inducting new staff:

“So, the training sessions, lunchtime drop-in sessions at least once a month where they can just come by and ask questions and share good practice. And we started up a buddy system of pairings of ones that

either have done it or are just starting doing it – we pair people up.”
(Harriet1)

Centres’ dedicated EPQ Moodle/SharePoint pages were also used by supervisors for self-selected training, as were regular email updates and an ‘open-door’ policy for 1-1 meetings with the respective lead Coordinator. Secondly, and linked to training, was the preparation of shared **resources and lesson plans** for the EPQ’s taught element, underpinned by regular communication with supervisors:

“And then Naomi3 quite often says, ‘This week would be a good time to do...’ so you do it! It’s scaffolding without saying you *must* do this – it’s more a suggestion.” (Guy3)

This approach helped to build consistency of delivery across the various EPQ groups, thereby linking with a third key aspect of lead Coordinators’ work: **monitoring**. Monitoring or tracking student progress was done in a variety of ways across the centres. For example, at SFC1 and SFC2, there was a shared, online monitoring sheet:

“So, if the student hasn’t done a review of what they’ve done so far, it’s empty – and I can email the supervisors to say, ‘Look, there’s a few who haven’t done this’ ... we’re quite strict at this stage. If they’re not getting this done, then they’re not going to finish.” (Ravi2)

At SFC3, two important ‘follow-up’ systems were in place: a) to pick up on student absence:

“We have an automated system that if a student misses two consecutive EPQ lessons, we’re notified as a teacher that they’ve missed them ... [*if*] it gets raised to the level of a referral, then they have to go and see Naomi3 - and then it goes up the system to a L2 referral. A L3 referral is when the parents are involved...” (Tanisha3)

And, b) to remedy poor student progress:

“Naomi3 runs a lunchtime surgery to pick up those who supervisors feel they’re not able to help...” (Tanisha3)

Monitoring the quality of lesson delivery, ensuring supervisors provide appropriate levels of support for students and help them meet deadlines, had been done in the past through the use of standard lesson observations. However, both SFC2 and SFC3, were moving towards introducing brief ‘learning walks’, supplemented by progress review meetings:

“I will go in and just have a look for 10 minutes or so ... we do have progress reviews, where I ask them to reflect on the students at given points in the year and to give them an effort grade so that I can then pick up students that are a problem.” (Naomi3)

Fourthly, **liaising with others** – internally and externally – was mentioned by all three Coordinators, whether in terms of promoting the EPQ to centre staff via INSET meetings (SFC1) or with regard to communicating with exam boards: “...queries, questions, that kind of thing...” (Ravi2), or partnership with universities:

“I’ve had conversations with [UEA] and with the University of Hertfordshire and Leeds ... I do use their resources, so a lot of the skills development sessions we use are the Leeds and Manchester resources that they’ve got on their sites for EPQ.” (Naomi3)

One further type of EPQ participant emerged during fieldwork as making an essential contribution to the programme, albeit in varying measures; namely, the Library/LRC representatives. Of these, SFC1’s Librarians were most heavily and consistently involved throughout the course:

“...providing the students with the sort of training to carry out research relevant to their EPQ and giving it that kind of depth and academic

rigour, if you like? Developing research skills that they can apply to it and then transfer on to what they do afterwards.” (Arthur1)

In addition to timetabled training sessions, they supported students and supervisors by securing appropriate resources not available in the Library (as did the SFC2 and SFC3 Librarians):

“Books ... we’ll get hold of journal articles, whether it’s by going to a university and scanning it or ordering it online from the British Library, that kind of thing.” (Arthur1)

New items were subsequently fed into the centre’s collection: “...and it makes it more interesting and more varied for students generally, so it’s good payoff for us” (ibid). At SFC2 and SFC3, the Librarians had been invited in previous years to run an induction session on Library support for the EPQ cohort, but not recently. However, Enid2 had worked with small EPQ groups instead:

“They will be given a master class in how to use the [LRC] resources and ... we can steer them to the particular resources they might not have been aware that we have.” (Enid2)

At SFC3, although Lois3 had the least contact with EPQ staff and students, she still regularly produced online resources and materials for SharePoint. Despite being somewhat daunted by the size and efficiency of the EPQ programme: “It’s very... it’s ‘all in place’ – all the plans are in place”, she was highly enthusiastic about contributing more to the programme in the future.

- **FC10: Managing EPQ demands**

Data within FC10 focuses on what informants have found to be particularly demanding about EPQ enactment, and how individuals, communities and even whole institutions have been ‘managing’ – that is, coping or interacting with any pressures encountered. Obviously, not all EPQ actors will be actual managers of the programme, but all – including student participants – find

themselves dealing with its various demands at different stages, given the potential impact of constantly varied and shifting contextual dimensions. For the researcher, the emergent evidence has helped highlight some of the key issues and concerns affecting the three case study centres, as well as confirm or refute certain assumptions made before and during fieldwork, and has provided useful information on the various coping strategies developed by informants in their various settings.

Clearly, a number of EPQ demands have already been discussed under other focused code categories. Nevertheless, in order to provide a flavour of the diverse range of attitudes, activities and approaches reported, it is proposed to consider in turn some of the key points raised by EPQ participants and contributors to the programme.

For student participants, forming a positive student-supervisor relationship had been entirely straightforward for some, but not for all. For example, at SFC2, the structured approach and clear foundations established for students regarding the EPQ and the role of the supervisor during induction had helped smooth the change to a new supervisor after the summer vacation. The students were in control and led the process:

“If we have any concerns, we just let our teacher know and then in the next lesson she’ll begin the lesson by ... going through the information or going through the PPT ... if we need more help with something and less help with another, then she’ll change it and we’ll do more on presentations or on referencing.” (Kathy2)

In contrast, unavoidable changes of supervisor for one group at SFC1 had meant that:

“We’ve had three different people, so we’ve never actually had one person for more than three lessons.” (Mark1)

As a result, there had been very limited 1-1 time or opportunity to build up mutual trust and respect, and students were confused as to how to cope with EPQ planning, record-keeping and time management. Indeed, some remained unaware that the supervisor's role did not extend to providing specialist advice regarding their project topics:

“...because Alex [*supervisor*] taught Performing Arts and that's not really relevant to me, I can't really ask for advice on the knowledge side of things because she won't know anything about that.” (Linda1)

Nevertheless, most of the students interviewed were realistic about the value of supervised sessions, despite the possible limitations to students developing artefacts rather than dissertations:

“I know the rest of us can sit at a computer but it's harder for people who are doing different things.” (Linda1)

The consensus of opinion in both centres was that properly structured, timetabled EPQ lessons were vital for motivating and providing focused time:

“You're not completely on your own ... It just provides you a bit of a kind of safe place to go and ask, and you don't feel left to yourself.” (Tim2)

However, not all students needed as much supervision as others:

“I find I'm doing a lot of work in my 'frees' and that's fine – but still it's nice to have that dedicated lesson where we can talk to our supervisor...” (Ivy2)

Interestingly, students from SFC2 and SFC3 were particularly forthcoming with regard to how they worked with both internal and external 'partners', in order to cope with some of the demands of the course, such as project development

and record keeping. One had improved the quality of her paperwork through talking with her Y13 Chemistry peer mentor:

“...she showed me how she’d formatted her [EPQ] diary and she’d done it as a table ... And I used that format in my own diary – and then the people around me saw my diary and said, ‘Oh, that’s really good!’ and they used that as well.” (Lorna3)

Several at SFC2 had involved family members, students in other classes and friends, in order to increase the coverage of online surveys:

“...my mum sent it out to all her friends, as did my brother and my dad. So I got about 70 responses from all different age groups...” (Ellie2)

“Because the key questions that I’m focusing on are gender and age differences ... I sent it to all my friends. I put it on Facebook and on Twitter – just everything, just in order to get as many responses as I could from the widest range of different kinds of people as I could.” (Anna2)

Others had also communicated with business and academic specialists in order to access their expertise. This had helped them scope their plans realistically and appropriately:

“I emailed a professor from Manchester about my EPQ ... I thought it was quite useful for reinforcing what I already thought would be the case. He was saying ... the more complicated the mathematical scale is, the more hard it would be to listen to ... so it would be good to stay away from those sort of scales.” (James2)

Regarding EPQ contributors, a number of issues raised by centre lead EPQ Coordinators and supervisors focused around ways in which they were managing to recruit and retain students to the programme, given the differences it presented when compared with other courses. For example:

“...even though we’re in an ethos of breadth, trying to convince a student who’s been brought up in an educational system where you have to take an exam every couple of years... trying to convince them that anything else is worth it is quite hard.” (Naomi3)

At SFC1 and SFC2, the task of annually attracting viable but manageable numbers of students to take up the optional EPQ, in the face of competition from other enrichment courses, was particularly demanding. Various strategies had successfully been implemented at SFC1, such as an Enrichment Fair and open evenings:

“...where we have students talking to other students about their projects ... I think being able to look at all the resources on Moodle ... actually being able to see projects - that really gives them a buzz.”
(Harriet1)

In addition, ensuring that Y12 tutors were well prepared to promote the course to their groups was also vital – as illustrated by several SFC1 student interviewees. At SFC2, however, where student and parental aspirations were strongly academic, the lead Coordinator had found communicating two key ‘messages’ to be most effective. Firstly:

“Definitely making [*students*] aware of the universities’ attitude towards the EPQ and showing them things that the universities have said about the EPQ and the lowered entry requirements that some universities have – that’s probably the biggest draw.” (Ravi2)

Together with:

“...just saying ‘Look, this is very, very different from anything else you’re doing and it allows you to explore an area which...’ You know, some of them may have wanted to do Art at A level but they were talked out of it or they were told it wouldn’t help them to get on to do

this university course, and [*the EPQ's*] a way of allowing them to explore this *and* get a qualification for it." (Ravi2)

Significantly, at SFC3, raising student awareness of HE's attitude towards the EPQ was cited as a realistic, essential action for helping to *sustain* student commitment to the compulsory programme. However:

"It's a sad fact that that will influence them more than: '*We need to do it to become independent learners for education's sake and inquiry's sake*' – which doesn't hold a lot of sway with a 17-year old who's looking to go to university." (Naomi3)

For both the other centres, finding ways of encouraging student retention on the EPQ was a high priority, though perhaps more so at SFC1 where a target had been set by the new lead Coordinator to reduce the number of student drop-outs in the autumn term:

"So, the way we've tried to do that this year is to try and really get them – before the summer – to really know what their topic is or to have a specific [*research*] question. That's the aim of the supervisors, to have it 'locked down' before they go..." (Harriet1)

Communicating a shared EPQ vision was deemed imperative in order for the supervisor team to be able to manage such a diverse range of student abilities and levels of commitment, bearing in mind that: "...students can be really passionate about the EPQ or have just [*been*] given it as an extra..." (Harriet1) and that they would only see them once a week:

"...and then you cannot keep track of them. And you know they're losing the momentum and you've got to kind of re-engage them somehow..." (Erica1)

At SFC2, however, EPQ input in the Y12 summer term was interpreted as being more of a 'window' of intensive teaching for a fairly large cohort interested in finding out what the course would involve, and learning basic research skills:

“And we try and find the right balance between just being too overbearing and terrifying and scaring them all away, and making them think it's going to be a breeze.” (Ravi2)

As it was accepted that a number would not continue their EPQ into Y13, student retention was considered reasonably high because:

“Technically, they're not dropping out because they never signed on.”
(Ravi2)

Other noted demands of EPQ enactment highlighted by EPQ contributors related to ways in which individuals had managed the opportunities and constraints associated with material contexts such as funding and resources (see also Section 5.2.4). With regard to the former, although EPQ budgets were clearly limited at all three centres, sufficient funding was available to cover basic costs such as photocopying and occasional visits to HEIs. Funding for staffing was managed centrally and, although again in short supply, resourceful strategies had been implemented to overcome the additional cost of running the EPQ:

“Post the summer, the [*student*] number reduces ... [*students*] will have done the majority of the work by then, so it's really a case of fine tuning. So you can have a teacher with a much, much bigger group...”
(Vernon2)

Nevertheless, a concern for both SFC1 and SFC2 was the fact that no funding could be found internally to support students in developing their projects, especially the more ambitious and costly ones such as artefacts and staged events, or those dependant on specialist equipment:

“They don’t get any funding unless they’ve organised it themselves – that could inhibit what they do and how they do it. If there was funding for things for students to do their research that would make a big difference.” (Harriet1)

“The Wellcome Trust is offering support in terms of facilities and resources but it’s difficult to access that – I don’t know how you get hold of them.” (Ravi2)

One further EPQ contributor referred to the complexities of managing EPQ budgetary demands; namely, the Librarian at SFC1 whose involvement with the course was considerably greater than at the other centres. Costs incurred by investing in the EPQ, and its associated student needs, were incorporated into the LRC’s general budget. Although this expenditure was not fixed, it had to be carefully controlled:

“I mean, someone asked us for a book about Roman mud huts at £120 and we said ‘Well, that’s a nice idea but there’s this one at £25; is that OK?’” (Arthur1)

In addition, records of EPQ spending were maintained, given that:

“It’s probably around 45-50 books are purchased for it, so it has an impact in terms of the service, I suppose, and the broadness of it.” (Arthur1)

In order to reduce some of the ongoing pressure of developing new EPQ teaching and learning resources for supervisors, SFC3’s lead Coordinator had been inspired to delegate maintenance of the SharePoint EPQ pages to a supervisor with expertise in media. She had also encouraged regular creative input from colleagues:

“We have had ‘sharing good practice’ sessions where they’ve adapted something or they’ve tried something else – so they don’t all use

‘straight as is’ [*resources*] but they take ownership in that respect.”

(Naomi3)

Finally, ways of managing some of the workload pressures resulting from specific aspects of the programme and the limited time available for their completion were highlighted by several contributor informants. For example, at SFC1, the lead Coordinator was conscious of difficulties emerging for supervisors trying to ensure all EPQ deadlines were met:

“When they come back after Christmas, they’re supposed to be focusing on presentations and I know some of them are finding it hard to get the students to actually commit to a time.” (Harriet1)

As a result, supervisors had been watching presentations in their lunch breaks in order to complete them all before marking started. Although no solutions had yet been devised for this aspect of the course (apart from limiting the size and number of student groups for each supervisor), new online resources had recently been introduced to alleviate other elements of their workload. These included a monitoring system for the Project Production Log, so that students’ entries could be checked online in their own time, and a comprehensive marking system:

“So now we’ve got the ability to do that online and then the moderators can enter their [*marks*], if they’ve changed anything. And I think that makes it probably a lot easier for the Coordinator as well.”

(Farida1)

Inevitably, the processes of standardisation, marking and moderation made considerable demands on the time of all supervisors and lead EPQ Coordinators, but nowhere more so than at SFC3, given the massive size of their EPQ cohort:

“It’s about to take up quite a lot of time – next Thursday is Standardisation Day with my *seven* moderators this year (because it’s grown) and then it will take up most of June – outside of my normal job.” (Naomi3)

Equally, managing to monitor large numbers of supervisors called for resourceful approaches by all three lead Coordinators, often via the judicious use of emails:

“The main thing I’ll do is send a big email to everybody just saying, ‘This is what you should have done so far; this is what you should be doing next, and let me know if there’ve been any concerns or issues’.” (Ravi2)

For SFC1’s Librarian, taking a pragmatic view regarding the use of his time and that of other LRC staff in developing new student training sessions was also essential in that it both increased staff teaching expertise and the range of resources for other subjects:

“It does take time but it also provides us with content that’s useful for other things. So we’ll do a referencing session – but we can use that in a different form for Health & Social Care students ...” (Arthur1)

As with FC9, this code is clearly process-driven. Moreover, how people respond and react in varying circumstances and with different colleagues and contacts can not only demonstrate and/or be influenced by their existing attitudes and opinions but can also prompt development and change, as demonstrated by attitudes and opinions expressed about the EPQ programme or those interacting with it, or those who are affected by it.

- **FC11: Reviewing & evaluating**

The final code within this thematic grouping captures evidence illustrating how research informants have utilised or witnessed various processes and procedures for ‘reviewing and evaluating’ in the course of EPQ enactment.

Reviewing and evaluating techniques may have been implemented in order to measure or assess: a) the overall quality of their EPQ programme and its benefits for participants; b) the impact or efficacy of their own interactions with it; or c) the actions or performance of others, including internal and external partners, and the centre itself. Clearly, this is to do with more than the assessment of candidates' work – a fundamental component and key objective of the overall qualification – in that findings reveal whether respondents actually do review and evaluate their own practice, and when, how and how often this takes place; also, whether reviewing and evaluating activities are conducted formally or informally, or in a combination of both, and who is likely to be the instigator/s. In keeping with FC10, this focused code represents emergent evidence regarding a specific aspect of 'participating' in the programme, together with respondents' attitudes and opinions.

Although reviewing and evaluating tended to be raised comparatively infrequently, respondents from all three centres made a number of insightful contributions testifying to the value they placed on such strategies for maintaining the quality and sustainability of their EPQ programmes. These included the three EPQ line managers, all of whom reported holding regular review and action-planning meetings with their respective lead EPQ Coordinators. Another example was supplied by SFC1's Library/LRC Manager who described how the new library-based, EPQ research skills sessions had been evaluated, to the benefit of both students and staff:

“And by reviewing the kind of sessions we're delivering, and making them more interesting and more focused, you kind of help yourself when you have to deliver, if that makes sense?” (Arthur1)

He also observed how, through reviewing current Library interventions provided at the start of the autumn term – the 'pinch-point' in the EPQ course when students were most in danger of dropping out – more effective student

support measures had been identified and introduced. In similar manner, at SFC3 in particular, reviewing and evaluating the efficacy of both existing and newly-introduced teaching/learning practices and procedures (such as the innovative Marketplace presentation events) had become a fully embedded component of EPQ enactment, in line with college strategic thinking:

“At the end of every year, there will be a reflection process. Because I run the Extended Curriculum Department, of which EPQ is a part, there will still be that Departmental self-assessment process and we will continue to look and to see how we can evolve and improve it.”

(Naomi3)

In addition, both EPQ Supervisors and students were regularly invited to give feedback:

“We have surveys and we also have sessions where they can talk and can review back. So, when Tanisha3 showed you the SharePoint [*EPQ website*], it's things like that that have been shaped by them in terms of what they do and don't like – and the same for the students ... they have opportunities to voice where we should be going with it or how we could change it.” (Naomi3)

In fact, documentary evidence confirmed that voluntary 'student voice' surveys were regularly distributed in all three centres in order to gain feedback on the whole EPQ programme and its components. At SFC3, a recent Leavers' Survey had verified students' positive opinions on the EPQ's added value, despite their more negative reviews of other enrichment curriculum options:

“We take it as a victory that now over half of them, about 55-56%, are agreeing or strongly agreeing that it [*EPQ*] was a worthwhile thing to do. And I think that there will be a number of them who retrospectively

realise when they go on to University that, actually, it *was* a worthwhile thing for them to do.” (Naomi3)

Students from all three centres commented on their experience of reviewing and evaluating within the EPQ learning programme, although views were somewhat mixed:

“There’s no specific time to discuss in the lesson – we’ve never had an organised peer review or anything like that.” (Anna2)

Whereas:

“Once a term or half term we’d have peer reviews where we went and showed all our documents and ... presented it to a couple of people in our group. And then [*one occasion*] we were grouped in a set of people who were doing similar projects and then presented it to them because then we might have more sort of similar, skill-based advice. That was simply how we learnt from each other.” (Stuart3)

Even so, he continued:

“I think it depended how closely related your projects were and who you were talking to, but for me personally, I didn’t find it particularly helpful...” (Stuart3)

Nevertheless, others did find peer reviews useful for motivating them:

“...if I was doing it with someone who had done a lot more than me, it made me feel like I needed to do more.” (Brian3)

For Stuart3, a more motivational form of activity was the half-termly tutor review because it had helped him set realistic deadlines:

“They [*the supervisor*] always emphasised how important it was to have your diary up-to-date as you were going along, keep your long-term plan and make sure that *you* felt yourself that you were on track and

you were happy to be talking to them in the review ... and be really positive about what you were doing and show that you were being proactive..." (Stuart3)

His opinion as to the benefits of tutor reviews was endorsed by an SFC3 supervisor (Guy3), who also noted that review points were now a requirement of the EPQ course. Even so, not all centres/supervisors appeared to have introduced tutor reviews as rigorously:

"I think I would personally benefit from it – maybe, potentially, the EPQ teacher, to help us along and that we've got a bit more structure, maybe we've got like assignments so that we have to finish the first stage of planning by next week and then the teacher will review it? ... At the moment, we're kind of left to our own devices and we've got no timeframes." (Mark1)

For another SFC3 supervisor, regular group peer assessments had proved effective:

"I grouped them in terms of what they were doing. So I had all the playwrights and novelists together ... and I could hear the writers talking about 'creative blocks' and, 'How many chapters have you written?' ... I could hear some really good, supportive conversations happening." (Tanisha3)

Clearly, where 'reviewing and evaluating' is concerned, it is evident that SFC3 has tried hard to embrace:

"...the huge benefits that come from students really being active partners in the learning process." (Jenny3)

- 4.2.4 Conceptual Theme D: Effecting Results

The final Conceptual Theme, 'Effecting Results', captures evidence regarding various types of outcome that participating, 'acting' or 'being acted upon' in various ways in the EPQ programme has produced for respondents and their colleagues. It comprises five focused codes, each representing outcomes gained through different means and identified by reflection on EPQ-related experiences: FC12: Responding to EPQ learning experience; FC13: Forming EPQ-related futures; FC14: Appreciating EPQ-related benefits; FC15: Encountering EPQ-related challenge; FC16: Recognising EPQ-related success. Such outcomes may not all be positive but all have the potential to influence programme development, interpretation, re-interpretation and translation, as well as aspects of its eventual operation. Consequently, the FCs grouped under Theme D relate to all four elements of the study's Conceptual Framework. In addition, some outcomes identified by respondents are significant in that they have the ability to shape/reshape operational aspects of other types of enactment taking place in the environment in which the EPQ is being enacted. For the researcher, data gathered under this Conceptual Theme provide useful information about what matters to the respondents, and those with whom they interact. For example, pointers are captured regarding what they deem to constitute 'success' or 'challenge' in terms of EPQ enactment, what motivates and enthuses them about the programme – or not – and how they would like to see it evolving, based on their experiences thus far.

- **FC12: Responding to EPQ learning experience**

As with all FCs grouped within Theme D, data collected under this code principally reflect the processes of 'interacting' or 'doing and being' – hence the use of the active gerund, 'responding', in the title. FC12 brings together evidence on what informants have found attractive or less attractive about participating in the EPQ learning experience, including the extent to which they

have enjoyed their interactions with others, and about aspects of the programme itself. Examples of what has worked well and/or less well are also gathered here; on occasion, interviewees have given reasons for their deductions in this respect, while some have also indicated how satisfied they feel regarding various elements of EPQ enactment. Examples of decisions individuals may have made as a result of their involvement with the EPQ are also captured; as such, the data may be considered more representative of 'products' or outcomes than of 'processes'. Ultimately, for the researcher, what respondents have chosen to highlight has helped provide further insight into what they, both as individuals and as part of a community, value most about the programme and their centre's approach to EPQ provision, thereby augmenting evidence presented under FC5: Making value judgements.

Student informants from all three centres were noticeably united in their opinions on what had been the more attractive and/or worthwhile aspects of their EPQ learning experience. In particular, many had greatly appreciated being able to research a topic of their own choice and of personal interest to them. As, for example, an A level English student at SFC1:

"I've always been quite [*fascinated*] just by the character of Shakespeare and how he might not even have been one person – he might have been a collection of people and it could have been a pseudonym ... you couldn't really pick somebody that influences English more..." (Mark1)

Students also valued the independence: "...I felt properly in charge..." (James2) and freedom the course promoted: "...the freedom that you often don't get and kind of want" (Rachel3). Nevertheless, in all three centres, weekly timetabled lessons and consistent 'teacher' support was considered essential for sustaining one's motivation and direction:

“It’s just like everyone wants you to succeed and that’s just a great feeling.” (Sam2)

“The fact the teacher supported my project – and was honest about the fact previous ideas weren’t as good – helped me finalise my ideas.” (Linda1)

Many students also relished the opportunity afforded by the EPQ to extend their learning in various ways:

“I’ve enjoyed being able to combine two of my favourite subjects into one piece of work – it’s enabled me to develop my areas of interest rather than just having to learn what I am told.” (Helen1)

Having the opportunity to apply knowledge gained through EPQ research was also valued, as exemplified by a dancer and a runner:

“Applying new knowledge from research on release technique into my own choreography...” (Pam1)

“I’ve really enjoyed finding out information about Sport Science and then applying it directly to my project in order to see the effect these aspects have for myself (i.e. caffeine / music).” (Stuart3)

In effect, the whole notion of “actually doing research” was deemed both a valuable and enjoyable aspect of EPQ studies, in various different forms:

“Primary researching leading to interviews and questionnaires...” (Anna2)

“Thinking originally and finding inspiration within research...” (Oliver1)

Certain individuals mentioned specific aspects of the course they had found especially attractive or valuable to them. For example, learning how to manage a project and conduct a case study (Kitty3), making presentations (Anna2;

Kitty3), creating an artefact (Kitty3; Rex3; Tyrone3), analysing data (Stuart2) and involving external partners (James2; Lorna3):

“Talking to a professional about my EPQ as it was a topic we were both interested in...” (James2)

Interacting with others was a type of EPQ learning experience much valued by several students, both in terms of working with and talking to peers about their projects, and when using research processes such as surveys and interviews in order to discover “what people think” (Ivy2).

When asked to describe elements of the EPQ they had found less attractive or of less value to them, students were equally united in their choices. Overall, it appeared that very few aspects had caused them difficulty or had been disliked in any way. Nevertheless, informants from all three centres, especially SFC1 and SFC2, commented on the concern they had felt early on in the course:

“Being thrown in at the deep end, I struggled at the beginning as I didn’t really know where to start when there was something to be doing.” (Helen1)

Moreover, several students had found it hard to understand at the outset what was expected of them in terms of the EPQ, perhaps in part because it was unlike other courses in terms of its freedom, independence and flexibility, though some felt it had not been made sufficiently clear to them (Bella1; Ivy2). Other common issues raised at all the centres related to understanding how to set and meet targets and deadlines, time management (particularly at SFC3), and maintaining consistent record keeping:

“Remembering to record everything [*and the*] routine of research updates.” (Oliver1)

Reflecting on their EPQ experiences prompted a number of students to comment on how the programme had helped to motivate them in various ways:

“Motivation to do work and not procrastinate...” (Oliver1)

“I enjoyed the independence of the project; I also believe that this helped me motivate myself more.” (Aysha3)

Even so, for just one student interviewee, the overall experience had not been positive:

“The main thing I have found less helpful is that after a couple of lessons I felt this was less necessary for my future but was forced to continue with the course, so it is hard to continue with something I see no use doing.” (Joseph1)

Other students were keen to share observations on what they had discovered about themselves through participation:

“I have enjoyed deciding what I want to research ... I have chosen what I am personally interested [*in*] and it has meant that I have looked forward to finding out more.” (Bella)

Other positive insights included: “Knowledge/realisation of *why* I’m wanting to do what I’m doing...” (Pam1), finding out how satisfying it was to be:

“...creating a piece of work with no help...” (Kathy2), and that, despite the amount of work involved:

“I have also enjoyed the challenge of the course as it is something I probably wouldn’t usually choose.” (John1)

Less positive aspects discovered included reluctance to be self-critical of one’s own work to begin with (Aysha3), difficulty in maintaining one’s focus on researching: “...as I get distracted very easily by hobbies...” (James2), and:

“I am a very disorganised person and often find I fall behind schedule by not checking my [*project*] timetable.” (Stuart3)

From the evidence provided by student participants, it is clear that informants were constantly responding to the EPQ experience – in other words, interpreting/translating and re-interpreting/re-translating. Thus, ‘responding’ can be seen to form a significant part of the discursive practice highlighted by Ball *et al* (2012) as being crucial to the enactment process. Indeed, everyone involved, including adult contributors and stakeholders, continually learns from their direct or indirect interaction with the programme and with other participants, and then responds in some way to what they have learnt – even by doing nothing. For example, although the Principal at SFC1 had never been an EPQ Supervisor, his knowledge and opinion of the programme had been influenced by contact with and observation of others, including his own son’s EPQ experience:

“I do think the EPQ has got a problem in that, presumably, it’s had to justify its academic rigour through a rather absurd amount of peripheral paperwork which goes along with it about the collecting ... or logging the whole process of working towards your project.” (Josh1)

Despite his concern, this personal awareness had clearly prompted empathy for the EPQ students and supervisors in his centre and respect for the high quality of project outcomes. Thus, Josh1 was just as strong a supporter of the EPQ as his counterparts at SFC2 and SFC3, both of whom had been more deeply and directly involved in the programme. For Steve2, who had supervised students’ project work, though not since the EPQ had been introduced, the experience he wanted for his current supervisors reflected the ethos of creativity and innovation promoted at SFC2:

“It’s that ‘seeing things through new eyes’, and for somebody supervising a piece of work a student’s doing and being taken on the

journey of the student and seeing the project through the student's eyes ... It gives you energy, it gives *you* ideas, it gives you release – and it's just not like hammering through the A level specification, because it's so different.” (Steve2)

Interestingly, what the supervisors themselves had learnt from facilitating the EPQ and developing effective student-supervisor relationships also related to empathy at times. Many were aware that the freedom and scope for originality embedded into the EPQ was completely alien to their students, especially the more compliant learners:

“When you say to them, ‘You can do anything you want’, they actually don't like that to begin with ... Sometimes, it takes a bit of coaxing and cajoling to get people who ‘want to be told’ to let go of that sense of wanting to be told and recognise that they can kind of be ‘masters of their own destiny’ in a much more positive way.” (Jenny3)

Even though all the supervisors interviewed were keen to stress how much they enjoyed working with EPQ students and helping them find suitable project topics, many had recognised their own limitations and greatly valued their interaction with others, particularly other supervisors and their lead EPQ Coordinator:

“...because you can get to a point where you feel you're just so stuck with someone [*student*] and then someone else comes in and they can help them – you think ‘Oh, no, I didn't think of that!’” (Tanisha3)

Others, particularly Desreen2 and Paul2, were aware of a “feeling of inadequacy” and of not being an expert in a sufficiently wide range of subjects:

“...it's having that expertise to be able to properly support a student which is probably the area that I find the most sort of concern. Yes, I can tell if somebody's managing their project and all those sorts of

things but, sometimes, students need to sort of bounce off an idea and I can't do this in some ways." (Desreen2)

However, they had taken a pragmatic viewpoint and knew how to direct students to a subject specialist, when necessary. In fact, the actual experience of working with so many and varied topics, was valuable in itself for reminding one of the curriculum beyond one's subject specialism/s:

"And often the students are influenced by things they have been doing in their subjects, so it kind of reminds you again of the variety of subjects we offer here and the sort of ... topics the students are interested in." (Paul2)

Lastly, it was particularly noticeable how much supervisors and senior managers from all three centres both enjoyed and valued witnessing the quality of students' work and their confidence during EPQ presentations:

"...because you just get this 'wow' –and some of them are talking, having never done presentations before in that style, they're talking at lecturing level." (Mary1)

For senior managers at SFC2, it was inspirational:

"And watching the kids do their presentations and talking about the things they've done, if that's not a red-hot education experience that we as teachers came into the profession to enjoy, then I don't know what it is!" (Steve2)

Whilst at SFC3, the introduction of the new Marketplace approach had proved to be educationally superior when compared with the old version:

"[Previously] they all knew the kind of things that they should say, whereas what I really liked about the Marketplace is that they were much more individualised in how they'd chosen to present themselves

and what information they'd chosen to put there. And so I think that differentiated better and was probably more authentic as a reflection of their projects." (Jenny3)

Despite the extra planning and preparation, the new format was proving worthwhile:

"...because there's enough time to say 'OK, tell me why are you so passionate about this?' They talk about the content and then you can get the process out of it. But if you *just* talk about process, it feels a little bit dry and contrived." (Leanne3)

- **FC13: Forming EPQ-related futures**

During interviews and other fieldwork activities, it was noticeable to the researcher how keen the majority of informants were to suggest ideas for helping to shape future EPQ provision, both in terms of its enactment within their own centre and on a national basis regarding possible changes to the formal qualification and/or its purpose. In addition, many wished to recommend ways in which future participants' interactions with the programme might be improved, based on personal experience, and were eager to justify their reasoning. Ideas and explanations tended to arise from, either, some form of review/evaluation activity within the learning experience itself, or from reflection during the interview process – both sets of data have proved equally valid and useful to the researcher. For greater clarity, it is proposed to present suggestions provided by respondents from each centre in turn.

Students at all three centres were asked to make recommendations on ways in which their centre's EPQ programme might be improved for future candidates. Perhaps inevitably, at **SFC1**, where the majority of the group had experienced at least one change of supervisor in less than a term, the need for supervisor consistency was raised as a priority by several students. Some also suggested

that one timetabled EPQ lesson per week was insufficient, especially for students creating artefacts (Linda1) and performances (Oliver1) which they felt generally required more time than dissertations. Additional time would enable students to more regularly access their supervisor on a 1-1 basis, and would allow for better guidance/monitoring to be provided by the supervisor in relation to time management of the EPQ alongside their other subject work, and target setting outside of lesson times:

“It would be nice for teachers to recommend to each one of us what we [*should*] do in our free time as, otherwise, we purely come in for EPQ stuff and then we don’t really know what to do when we’re working in our own time.” (Joseph1)

Unsurprisingly, given comments previously presented under FC12, the need for better information on the requirements of the course prior to opting into it was recommended: “...as it was quite a surprise how much there is to do...” (John1). Moreover, he requested:

“Perhaps a bit more guidance before the summer so I could properly plan over the summer what I was going to do...” (John1)

Finally, given that SFC1 is the only centre to run both subject-specific and generic EPQ groups, it was interesting to note that the randomly-chosen group of student interviewees were firmly in favour of more, rather than less subject-related setting:

“Make sure there are specialised groups in every subject – not mixed!”
(Linda1)

However, EPQ Coordinators and supervisors should also treat students’ topic preferences fairly:

“College should be more aware of people doing more creative subjects [because] a lot of emphasis on sciences and essay-style projects becomes unhelpful as you don’t feel like it applies to you.” (Pam1)

When invited to suggest areas for development with regard to their centre’s EPQ programme, it was noticeable that the majority of ideas offered by adult informants at SFC1 were geared to improving communications systems and inter-relationships between different communities. For example, supervisors felt that improving the EPQ website would make it more accessible to students and staff: “A jazzier Moodle page and clearer sections...” (Erica1). Moreover, the Librarian was keen to contribute a series of digital examples of previous EPQ projects to inspire and guide students before and during the course. Both he and the lead Coordinator noted there was scope for improving EPQ marketing generally and raising wider awareness as to the high quality and inventiveness of students’ work:

“Even if it’s just kind of recognising that students are doing these interesting things via social media, it’s like why not tweet about the fact that someone’s doing their EPQ on ‘address #recipes’? [It] would benefit both students and parents.” (Arthur1)

In fact, as he further commented: “...there’s such a variety, it’s almost criminal that we’re not making more of it”. For the lead EPQ Coordinator, other possibilities included involving existing HE partners in the recruitment process for the EPQ and inviting them to talk to staff, whilst one supervisor saw potential in establishing a series of interviews with ex-students:

“I had a student come in from Sheffield who was doing Philosophy and she talked to my students about her EPQ.” (Linus1)

As an increasingly important contributor to the course, and in light of future plans for reviewing and improving his current EPQ input, SFC1’s Librarian was

particularly keen to see the relationship between his department and the EPQ develop into more of a collaborative partnership, with mutual benefits:

“I’d like to see our support that we offer kind of expand where appropriate ... And to build on the relationships and make us kind of quite embedded in it...” (Arthur1)

However, for this to happen would require better communication and consistency:

“I’d like it to be a given that we get told when the dates all come through for when this all starts. Who’s managing it, who are the teachers [*supervisors*]... If you’ve got that information, with enough time, then you can plan better and it works better.” (Arthur1)

In terms of improving EPQ delivery for students, it was recognised as essential that future plans should align with centre priorities for teaching and learning:

“And obviously linking in... our main job is obviously building learning power through the taught skills element.” (Harriet1)

To this end, several EPQ Supervisors were planning to encourage students to use study apps. and digital platforms as a means of accessing information more efficiently, whilst the lead Coordinator was planning to develop a ‘skills checklist’ of the skills that, ideally, all students should leave with at the end of their EPQ for sharing across the EPQ team in order to improve understanding and consistency.

Several informants offered views on how the EPQ might be improved or developed at the national policy level. Ideas included reducing the amount of cross-referencing involved:

“...in the sense that, sometimes, it is confusing for students about where they’re meant to be getting their evidence from.” (Farida1)

Also, the Principal questioned the amount of emphasis placed on measuring 'the process' in the EPQ, in terms of: "...thinking about how you develop ideas and test them out", because ideally, "...the process should be visible in the product":

"I think you can actually kill the pleasure and the excitement of what you do, by the bureaucracy which hangs with it – which is presumably for exam board/Ofqual purposes?" (Josh1)

Lastly, it was suggested that access to the EPQ learning experience should be extended to cater for a wider audience. This could happen through the introduction of a Level 4 version: "...because there are some here who could do a higher level" (Mary1), and also through its adaptation for use in apprenticeship programmes and adult education:

"It would be a great thing to do if you were coming back to education and you were doing an access course or something like that. I think adults would jump at the chance to do that." (Linus1)

When the student groups at **SFC2** were invited to make recommendations regarding ways of improving their centre's EPQ provision, the importance of providing better guidance at the start of the course was prioritised (as had also occurred at SFC1). Several students felt there had been a lack of clarity at the outset regarding course requirements and expectations (for example, Ivy2 and James2) and that more explanation on how to tackle documents such as the PPR was needed:

"When being told at the start about the EPQ, the process could have been explained in more depth." (Tim2)

One student suggested their understanding could be aided by accessing actual project examples from previous EPQ cohorts. Such resources would be particularly useful if made available in the form of 'exemplar work folders':

“...because I think it’s all well and good knowing what you need to do but sometimes just looking through someone else’s work is really useful.” (Ivy2)

Another student (James2) also raised the idea of assigning more time for the EPQ, although this was more to do with starting the programme earlier in Y12 than having more lesson time per week. More supervisor support was suggested in terms of:

“Better help to complete previously unknown tasks, such as referencing.” (Tim2)

In addition, students recommended that supervisors should provide more guidance on time management and target setting, as had SFC1 students, as well as more information on different ways of planning: “...not just Gantt charts...” (Anna2). Lastly, a student suggested the centre’s web-based resources could be improved:

“Better online resources – more succinct, leave out unnecessary materials.” (James2)

Several possible areas for development cited by the adult informants at SFC2 focused on improving marketing and communication systems, as was also the case at SFC1. Recommendations were made that the centre’s links with universities and employers should be augmented, to enable easier student access to HE/business-based facilities and materials:

“It would be nice if there was a support network ... or some opportunities for students to do slightly more adventurous and equipment-based projects. That really is very, very difficult to provide for in the college.” (Ravi2)

And also to ensure staff better understood what employers might want from the EPQ programme:

“Because if a student goes straight into work after the EPQ, we’ve done our bit – is there anything we could have done better?” (Desreen2)

For the lead EPQ Coordinator, looking at how the EPQ itself might be used to attain more business links for the centre was a priority for the next academic year, given that the enhancement of students’ vocational and work-related skills was to be an area for development across the whole institution. He believed the EPQ could play a valuable role in this initiative; for example, by inviting local businesses to the Presentation Evening, not only would the students’ project work be publicised more widely but the centre’s reputation could thereby benefit, whilst the prestigious event would provide an excellent opportunity for starting to build, and reinforce, mutually beneficial partnerships. Nevertheless, more involvement in the event by senior management would be necessary in order to gain the best results:

“We get huge publicity for music and drama events and I think it would be good to get more publicity coming from that.” (Ravi2)

A further priority was to market the EPQ to all staff:

“...the whole college just knowing what the EPQ is in more detail, as a lot of tutors are only just starting to get their heads round what it is themselves, and so more core staff awareness of that [*would be beneficial*].” (Ravi2)

Interestingly, recommendations made by SFC2’s Librarian were sharply reminiscent of Arthur1’s comments. As a keen contributor to the EPQ programme, Enid2 also wanted to see stronger communication systems develop between her team and the EPQ team. For example, even being furnished with a list of supervisors would be helpful because it would make it easier to proactively contact them all regarding what the LRC could offer:

“...and not just the ones who routinely do include us ‘in the loop’, if you like.” (Enid2)

Moreover, she felt that, if EPQ induction were to make it a priority to include information for students, right from the start, as to the support they could access from the LRC, this would help to increase students’ use of their facilities/resources.

In terms of the national development of the EPQ, SFC2 informants were particularly keen to suggest ways in which the exam boards might improve their support for the programme. For example, given the impact of the digital age on students, who now accessed far more online resources and materials than hard copy versions, the possibility that students’ EPQ PPRs could be held centrally online would help them, their supervisors and their moderators:

“It makes some of their submission a bit easier – it could even be that students submit things *during* the time it [*the course*] goes on and they submit it to some kind of folder that’s built up?” (Paul2)

It would also be helpful, in the light of previous experiences regarding students’ project choices, if exam boards were to publish more rigorous ethical and Health & Safety guidelines for centres, with perhaps some sort of review form to be completed by the students themselves:

“Increasingly every year, we’ve had someone who’s trying to build a biological weapon or something and I don’t know what to say ... the college obviously provides guidance – I’ve had to go and speak to H&S staff here... but it’s not obvious what I should say sometimes...” (Ravi2)

Undoubtedly, SFC2’s lead Coordinator and Principal were both committed to the EPQ and eager to see it grow in popularity, both nationally and in the college, despite some anxiety in the current financial climate as to how any extra demand might be met.

Lastly, for almost all student interviewees at **SFC3**, one specific area for development was prioritised – namely, the existing provision of weekly timetabled EPQ lessons which were compulsory for everyone. Several reasons for change were given, based on the students’ recent experiences, including the difficulty of attending lessons during the Y12 summer exam period and whether it was really necessary to attend every lesson, once one’s project was ‘up and running’. For them, in light of the high level of autonomy and student-led learning promoted by the EPQ, and prevailing in the ethos at SFC3, surely it would be better to be allowed to work more in one’s own time:

“Maybe not have EPQ classes quite as often after the first few weeks; this would be more beneficial to those working on artefacts who may not be able to bring them into school.” (Tyrone3)

Students suggested a range of possible solutions, such as having fortnightly compulsory lessons with the intervening week being optional (Rex3), and optional access to 1-1 meetings with one’s supervisor:

“...have like drop-in sessions instead of an actual timetabled one. So, if you wanted the help, you could go to it but it was more of an optional thing...” (Kitty3)

Nevertheless, a number of students still supported and valued the notion of retaining consistent periods of supervised time in order to address other perceived needs. These included giving more time to information sharing and actual ‘teaching’ (Aysha3), and providing more opportunities for regular 1-1 sessions with the supervisor, as well as for peer support and peer review activities:

“Time in class to share EPQ-related ideas and worries with the rest of the class...” (Rachel3)

Significantly, the majority of SFC3 students made one further recommendation, in line with the students at SFC2. This was that greater use should be made of examples of work from previous EPQ cohorts, including live presentations from Y13 students during course induction lessons:

“Like, in the first lesson you have three pupils present their EPQ from the previous year – then you’ve got more of an idea of what you have to do.” (Tyrone3)

This final student recommendation was also echoed by several of SFC3’s adult informants in their request for future supervisor training:

“I’d quite like to see examples of projects from elsewhere, so a broad scatter effect. One good way of doing that is to go on YouTube – there are students who put their presentations up on YouTube...” (Guy3)

Moreover, supervisors would benefit from seeing a range of exemplary EPQ folders from other centres as a means of challenging their own perceptions of delivery methods and the quality of outcomes, thus avoiding ‘getting stuck in a rut’:

“...because obviously we probably fall into a pattern of knowing what we think we like and we probably have a bit of a house style...” (Jenny3)

Again, the importance of improving the marketing of the EPQ was raised. For example, to ensure that its purpose would be better understood in the wider community:

“...explaining to parents about why we’re doing it ... [*and*] why we think it’s great” (Jenny3)

For the Principal, centre staff were able to do more to raise the EPQ’s profile and publicise the innovative work of the centre at a national policy level, as well as with universities and local employers, in order to gain more widespread

support for the qualification. For Naomi3, a priority would be to market the value of the programme more vigorously to governors, especially given the centre's ongoing funding constraints, through inviting them to future Marketplace events. She also saw the potential of inviting employers to the Marketplace – for increasing employer engagement with the centre, for helping to develop students' employability and for publicising the benefits of the EPQ in terms of employability to the employer:

“...that it continues to develop such a reputation amongst externals that it therefore continues to develop its reputation here.” (Naomi3)

Inviting ex-students back to the centre was again recommended as a means of marketing the longer-term value of the EPQ to students:

“...getting feedback from students coming out from university education or being out in the workplace for a number of years – coming back and saying, ‘This is what it's like; this is why it was so useful, this is what you can get...’” (Tanisha3)

This was especially important as, for some:

“...it's not cool to like EPQ, it's not cool to like your EPQ project ... I'd like to see them talking in a positive way about it and sharing what they're doing with each other a bit more, and being excited about it.” (Tanisha3)

Unsurprisingly, student negativity was bound to be a problem for a centre where the EPQ was compulsory, although only a minority were affected:

“Obviously we'd like it if we could convince students at the reluctant end of the spectrum that this really is in their best interests, but you're never going to get that with a cohort as large as ours...” (Jenny3)

Finally, comments from SFC3's Librarian again reflected the recommendations made by her counterparts at the other centres. She, too, was keen to develop a closer relationship with the EPQ team, to know the programme better and to understand how she could best contribute to it, perhaps through:

“...involving me more in the planning and process, or perhaps I should be regularly going to their meetings, just to see what they're doing and what it's all about? So, how could I get involved in planning lessons or planning how the library contribution could fit into the timetable?”

(Lois3)

She was also anxious that EPQ students fully understood what the Library could offer and that she and her colleagues were there to help them.

- **FC14: Appreciating EPQ-related benefits**

Virtually all research informants were keen to contribute opinions on the short-, medium- and long-term benefits they felt they had gained from interaction with the EPQ, and found no difficulty in identifying not only what the experience had done for them but also what they had observed in others, and in their centre. Indeed, because so much data was forthcoming, only a flavour of the extensive range of perceived benefits reported by EPQ participants, contributors and stakeholders can be provided here. Benefits may be considered as being 'hard/tangible', such as examples of skills and knowledge developed or additional resources gained, or as 'soft', such as positive feelings of job satisfaction, attitudes/characteristics or of being valued in a particular role. However, it is important to note that 'appreciating' EPQ-related benefits can also be about recognising what one has *not* gained, perhaps through personal reluctance to participate or a definite decision not to be involved. Equally, interaction with a specific range of contextual dimensions may have made certain benefits unattainable for some EPQ actors.

With regard to the more tangible, 'hard' benefits that students across all three centres felt they had gained through EPQ participation, a large proportion of responses referred to the attainment of research skills (for university), with specific mention made of referencing, document composition, how to evaluate sources and how to test for reliability. For one student, "analysing sources" had proved particularly advantageous:

"I only do maths-based subjects where we rarely analyse written work." (James2)

Combined with these skills, being able to act independently was also cited as a benefit of participating in the EPQ: "A taster of what it's like to study/carry out research independently..." (Helen1), including the skills of independent thinking, learning and study:

"I feel I have gained the ability to work individually and work out the processes necessary to complete each section (i.e. where it's best to get research from)" (Stuart3)

Other 'hard' benefits that students in SFC2 and SFC3 felt they had gained during their course included skills of project management, dissertation-writing, presentation (such as effective techniques for engaging an audience) and time management. Some at SFC1 had also attained organisation skills, along with 'perceptive thinking' and, interestingly, an 'academic perspective on practical subjects' (Oliver1). In addition, and particularly where SFC2 and SFC3 students were concerned, participating in the EPQ had brought great benefits in terms of increasing topic-related knowledge and skills, including physical skills, such as woodworking, and IT skills: "Creating my artefact online" (James2).

For adult informants across the centres, 'hard' benefits also related to the attainment of knowledge and skills, some of which were specific to the requirements of the course, such as familiarity with marking, standardisation

and moderation techniques. For example, at SFC1, a benefit for one supervisor was to have learned how to guide students on 'process' and how to evidence this (Erica1) whereas, for another, it was more about the opportunity afforded by the EPQ to talk with others:

“Because the people who are supervising EPQ are across all ranges of subjects, so you’re talking about stuff and about learning and things, and education with your colleagues.” (Farida1)

A third pointed out that there were huge benefits to be gained for teachers acting as supervisors: “...because it’s a completely different role”, involving the development of facilitation, mentoring and tutoring skills:

“And I know a lot of supervisors find it very difficult not to get in there and guide the students in a certain direction...” (Linus1)

This viewpoint was also endorsed at SFC2:

“In terms of their skills, [*the EPQ*] teaches staff... it shows staff what students can do without having their hand held all the time. I think staff forget, or don’t realise...” (Ravi2)

Although fewer 'soft' benefits were mentioned by students at any of the centres, several felt they had certainly gained in confidence and self-motivation. One had learned how to be more flexible and realistic in her expectations of herself; for example:

“...saying I will do something by a certain time, but realising that I won’t be able to.” (Bella1)

Another had gained a significant level of freedom and personal fulfilment:

“I feel the EPQ has given me the excuse to work hard and spend time on something I have always wanted to do.” (Stuart3)

For adult informants, perhaps the greatest 'soft' benefits gained tended to relate to the professional satisfaction and pride they took in the achievements of their students, combined with: "...working with students in a different way and seeing them in a different light" (Jenny3):

"Oddly, the EPQ really does give you a connection with the students that you don't sort of get in the more formal teaching environment..."
(Jenny3)

For Erica1, watching her students develop 'intellectual curiosity' had been a particular benefit, as had the opportunity to gain an insight into their personal interests, a benefit also mentioned at SFC3:

"So it's really good – I've really enjoyed talking to students about things I'd never spoken to them about – science projects, PE projects..."
(Tanisha3)

Similarly, at SFC2, a particular benefit highlighted by one supervisor was how one's perception of the students altered as they became independent learners through working on the EPQ:

"It reminds you of just how great the students are as well – how much they're capable of doing. It reminds you of how much you sometimes limit them in what they can achieve ... so they're the things you get as a teacher." (Paul2)

In addition, there were benefits to be gained such as the freedom and flexibility available when not having to teach to a syllabus or have everything exam-assessed:

"Far less input from the teacher, far more checking and touching base and dealing on this more personal way. And that is a lovely change from normal life for people who are doing lots and lots of assessed courses." (Josh1)

Clearly, this was providing benefits for the centre as well, by improving staff wellbeing: "...a *little* bit of an escape from the straitjacket of the syllabus" (Josh1).

- **FC15: Encountering EPQ-related challenge**

As with its thematic partners, this focused code has much to do with respondents reflecting, reviewing and evaluating on a summative basis their experiences within the EPQ learning programme. It is about capturing respondents' perceptions as to when, where, why and how they may have encountered challenge, rather than what such challenging situations may have prompted them to do. Examples of the latter are presented under FC10: Managing EPQ demands, as they are more in harmony with the objectives of Conceptual Theme C: Acting & Interacting (process-focused) whereas FC15 is grouped within Conceptual Theme D: Effecting Results (outcome-focused). Examples of other challenges, particularly those occurring through informants' interaction with the contextual dimensions surrounding EPQ enactment in their respective centre, will be referenced later in Section 5.2.4.

Some of what students construed as having been challenging for them about the EPQ has already been captured under FC10, such as the lack of supervisor continuity at SFC1. Also, examples have been presented under FC12: Responding to EPQ learning experience, particularly students' difficulties in coping with the early stages of the course, time management and targets/deadlines. However, a small number of other issues were reported, including the extra pressures caused for those preparing artefacts or performances when access to appropriate facilities, such as practice space or specialist equipment, was unavailable during supervised lesson times:

"Try and have more than just one session a week because, first thing, for those guys who are doing artefacts it is really hard for them. I know

the rest of us can sit at a computer but it's harder for people who are doing different things." (Linda1)

For some, this had proved especially frustrating:

"It sort of meant that you *had* to be there and it wasn't always a great use of your time when you could have been somewhere else, like doing researching or doing it ... if you're doing just an artefact, you know, you don't actually need to be there. You're just sat in the room for an hour..." (Kitty3)

It had also resulted in greater demands being placed on students' own time outside lessons, and increased their stress levels when trying to balance EPQ work alongside the demands of other subject studies.

For adult informants, the opportunity to reflect on ways in which they had responded to and interacted with the EPQ programme raised feelings of inadequacy in some (see evidence in FC12) which in itself had been challenging to deal with, but the support of colleagues and continued supervising experience had helped to overcome this. For others, managing and coordinating certain aspects of the programme, including student recruitment/retention and, for SFC1's Librarian, managing EPQ budgetary demands, had also proved challenging (see FC10). As with the students, however, a small number of additional but significant issues were raised by EPQ contributors and stakeholders during interviews. For example, a supervisor at SFC1 noted how maintaining students' engagement in (and commitment to) developing an *extended* piece of work had proved a challenge in the current social climate:

"...when the world is just getting that little bit more 'sound-bitey', and they're not, in their kind of way of being ... they don't give time to

things? And we're asking them academically to give thoughtful time to things, and that's quite tricky, isn't it?" (Shane1)

At SFC3, another supervisor noted the impact made by the increasing size of EPQ groups at his centre, from around 16 students in previous years to an average of 24 per group, in order to cater for the whole Y12 cohort; he anticipated this would be compounded in future years when one supervisor might be responsible for up to three groups, comprising as many as 75 students in total:

"This is a major challenge ... I think it's a little bit harder, year by year, to engender a sense of community amongst the whole group." (Guy3)

He also noted the ethical challenge for supervisors when dealing with the minority of students that he could see were clearly failing in their EPQ:

"There are signs there, but pulling people back from that and *making* them do something when part of the ethos of this is 'make it for yourself' – there is a tension there." (Guy3)

Interestingly, a different but similar dimension inherent in the supervisor's role was noted elsewhere at SFC3:

"When students are saying, 'How can I make this better?' some projects by their very nature feel like they have a bit of a ceiling in terms of how far they can take a student in terms of stretch..." (Jenny3)

In effect, even though a supervisor might be able to imagine all sorts of alternatives for creating a project on the same topic, once a student had: "...set off down a particular journey..." with a specific end-point in mind, sometimes this would in itself reduce their potential for success:

“I don’t think it could have got her the very top grades because of the way that she’d conceived it. So I guess that’s a kind of challenge.”
(Jenny3)

For SFC2’s Principal and lead EPQ Coordinator, ongoing challenges relating to EPQ provision and enactment were chiefly to do with timetabling and staffing supervised lessons, as well as competition from other events, especially during the summer term induction stage:

“So there’s things like trips, there’s the DoE which I go on, there’s a trip to Ghana... and it does clash with this one very important time.” (Ravi2)

Further, although the Principal was a strong advocate of the EPQ and keen to see numbers increase in his centre because of the potential value of the programme for all his students, the challenge remained as to how they might possibly cope with a larger cohort:

“How do you timetable it? *Who* do you timetable to do it? The numbers that we can manage... How do you moderate across a huge number? Those are the issues for me that are the most worrisome.”
(Steve2)

Staffing, particularly in terms of how to deal with constant changes in her EPQ Supervisor team, was a challenge for the newly-appointed lead EPQ Coordinator at SFC1 – more so than at the other two centres:

“The changing staff – so we don’t have a kind of bedrock of experienced staff. We do have some that miss a year and then return to it but that is quite difficult.” (Harriet1)

In addition, whereas her predecessor had been supported in running the EPQ by a small team of other staff, she was now entirely responsible for managing and coordinating the programme herself with no designated time. Her Principal was clearly sympathetic to her situation but had to work within the

financial constraints of his centre. Therefore, the solution had been that, rather than Harriet¹ personally managing her supervisors, this would be done by the centre's Curriculum Directors:

“So Harriet's job *really* is to liaise with the Directors, of whom there are 10, and try to ensure that they are managing this effectively – but it doesn't work like that ... So that's a significant challenge.” (Josh¹)

Lastly, the lead EPQ Coordinator at SFC3 raised an interesting point about the challenge for supervisors in managing to 'sell' to students a balanced understanding of the relationship between process and outcome:

“...because we're trying to stress to them it's all about the process, or predominantly about the process and the skills developed to get to the outcome and so on, and they then hear that as: ‘We don't care about what you *do!*’” (Naomi³)

- **FC16: Recognising EPQ-related success**

The final focused code in this thematic group covers a broad spectrum of topics relating to the notion of success. During interview sessions, all types of informant, whether EPQ stakeholders, contributors or student participants, were keen to share views on what they perceived to be 'EPQ-related success' in its various guises, and to describe how successful they believed they and their colleagues/peers had been with regard to EPQ enactment. For instance, student success was exemplified in terms of achieving one's project goals and simultaneously developing new skills:

“Physically making a longboard – I'd no idea how to do that originally. I developed skills with woodwork and things like that. Also, I made a movie as well ... a compilation of photos and things like that.” (Rex³)

Supervisors described the success they had witnessed during project presentations, in themselves highly successful occasions for capturing what had been achieved and for inspiring other students:

“*[The presentation]* really worked well because it prompted a lot of discussion and the students were sort of beside themselves, wanting to ask questions and to question Sam.” (Desreen2)

“When you hear the students’ feedback, testifying to their achievement in the EPQ – I suppose it’s just they’re ‘living the dream’? That’s the most successful bit ... just hearing them speak with such pride...” (Tanisha3)

Further, the range of projects successfully undertaken by students was deemed incredible:

“Robotic arms... and someone made a car – they built a car and got it MOT’d, drove it to college, parked it up outside ... and that was their project!” (Ravi2)

At SFC3, students regularly set up group projects based around organising and running fundraising events for charity. Many had proved extremely successful:

“I think the charity events are really fantastic ... I had one group – four students – that did a number of charity events ... They raised something like £1,000 and then they approached the Bank, who matched it – which was amazing!” (Tanisha3)

Interestingly, however, a number of supervisors observed that student success appeared not necessarily to be solely dependent on ability levels or career aspirations. For example, at SFC1:

“We’ve discovered with some students who are not necessarily terribly academically able, that they have absolutely blossomed doing an EPQ because they’ve done something they’re really interested in.” (Farida1)

Similarly, at SFC2, supervisors believed that all students should be allowed to try the EPQ:

“*[Because]* there are students out there who may not be high flyers with all the As and A*s but they could be high flying in other areas.” (Desreen2)

And at SFC3, the EPQ was actually assisting less able students to be successful:

“We know of students who were getting their offers even though they didn’t quite meet their grades – they had an EPQ and therefore universities said, ‘Yes, we’ll have you’.” (Naomi3)

For staff involved in EPQ delivery, success could perhaps best be exemplified in terms of developing and applying relevant pedagogical expertise, as previously noted in FC14:

“...maybe learning new teaching techniques, learning a little bit more about what students are capable of and therefore changing your expectations.” (Ravi2)

However, to be a successful lead EPQ Coordinator would require a far more complex mix of skills and abilities, as noted about Naomi3 who was tasked with managing the whole Y12 cohort at SFC3:

“Huge organisation, huge centralisation of resources, huge commitment... Basically, support for the team, *[running]* lots of training, lots of standardisation, really bringing everybody together such that it is easy to then just concentrate on your students and their development, rather than worrying about anything else.” (Leanne3)

In terms of the success of the EPQ programme itself, many informants from all three centres enthusiastically testified to their centre's track record of outstanding results, such as at SFC2:

“Our results over this past couple of years have been great – a very high range of A*s and As...” (Ravi2)

Similarly, at SFC1, the programme had gained Ofsted recognition:

“Our enrichment and additionality opportunities, including the EPQ, were outstanding.” (Mary1)

At SFC3, senior management firmly believed that the centre's outstanding HESA outcomes, in which: “...we outperform other students in all other sectors in terms of how they go on to do at university – in terms of 1st class Honours and 2:1s, and so on...” (Jenny3), were largely down to the long-term benefits that participation in the EPQ had provided for centre students, once they had progressed on to their undergraduate studies.

For SFC1 and SFC2, having a successful EPQ programme had facilitated good publicity and had also improved relationships with universities:

“I think that the success of so many students in the EPQ shows just how many students leave here with those skills which mean they are well suited to university when they do go there.” (Josh1)

And at SFC3:

“I think it has made the important breadth that we see as part of our educational vision; I think it's made it much more valuable, more relevant...” (Leanne3)

However, the words of a supervisor at SFC1 probably sum up most succinctly what the EPQ does best of all for the students engaged in it:

“I suppose it’s incredibly successful in gearing the students up, not just for HE but in terms of transferable skills and thinking outside of the box, taking responsibility for themselves, time management... all these kind of key things.” (Linus1)

4.3 Conclusion

The following Chapter is concerned with presentation and discussion of further key findings, specifically relating to the three case study centres and again based around the analytical framework structure. Some of the distinctive factors underpinning EPQ enactment in each respective centre are identified, with the focus being on contextual aspects and the actions and interactions of the various individuals and/or communities of practice who have responded during the research process. Two sources of data are scrutinised: firstly, what may be ascertained from analysis of responses to the short Opinion Finder activity completed during interviews (see Appendix E). Secondly, the perspectives of informants regarding the three major aspects of practice introduced in Chapter 2 – leaders and leadership, issues of power and contextual dimensions – all of which are capable of exerting a strong influence upon actors engaged in the process of EPQ enactment.

Chapter 5: Centre Findings

5.1 Introduction

As may be deduced from the considerable array of topics raised by informants during interview sessions and subsequently coded to the sixteen focused code profiles defined in Chapter 4, fieldwork for this study has produced a substantial amount of rich, qualitative data. The process of analysis has afforded the researcher a multi-faceted insight into the workings of three different post-16 centres, all engaged in running the EPQ, and the various types of contribution made by different adult and student 'actors' involved in the qualification's enactment. In addition, my attention has been drawn to the enabling, and sometimes inhibiting, mix of context-related circumstances unique to each setting in which EPQ enactment takes place, and with which the process must in many ways contend. As Ball *et al* observe about policy enactment:

'Policy creates context, but context also precedes policy.' (2012: 19)

On the basis of emergent findings from the case study centres, I would argue that this statement could equally well be applied to EPQ enactment. From informants' comments have emerged many indications that the learning programme has the ability to influence or 'create' changes in the context surrounding it, both centre-based and further afield. However, it is also certainly true that context precedes the EPQ, which is why I would suggest that purposeful, informed application of the enactment processes of interpretation *and* translation are so vital for ensuring the programme's continuing success.

In order to illustrate how the centres and actors involved in this study have approached EPQ enactment, it is proposed to present findings from two specific sources in Chapter 5, beginning with findings drawn from analysis of

the small-scale Opinion Finder activity that all interview informants were invited to complete. This is the only element of the research that might be termed 'quantitative' in character and is useful for comparing the views of stakeholders, contributors and EPQ participants, both within a specific centre and across centres, and within the same category of respondents as well as across different categories. Activity findings are presented in Section 5.2.1 in two stages: firstly, for the whole informant sample, and secondly, findings specifically pertaining to each case study centre.

The second set of findings, presented in Section 5.2.2, draws on evidence supplied by informants during fieldwork interviews and observations regarding their perspectives on the three major aspects of practice discussed in detail earlier in this thesis (Chapter 2). All three aspects are interrelated and interdependent in many ways, and all have the capacity to significantly influence the direction taken by actors engaged in the EPQ enactment process:

- a) **Aspects of leadership** – focusing on the leadership style of centre Principals/SLT members and its impact on culture and ethos, and their involvement in the EPQ; also, the approach to leadership taken by the lead EPQ Coordinator;
- b) **Issues of power and empowerment** – evidence from informants regarding who or what they perceive holds power in different centres and how this may impact on EPQ enactment;
- c) **Interacting with contextual dimensions** - examples of creative, resourceful or innovative ways in which actors have sought to deal with specific contextual issues in order to use them to best advantage in terms of EPQ enactment and/or to minimise any detrimental effects.

5.2 Findings illustrating centre actors' approaches to EPQ enactment

- 5.2.1 Opinion Finder activity: findings

The Opinion Finder (Appendix E) worked extremely well as an ice-breaker for each of the one-to-one and group interview sessions as it created an excellent opportunity for respondents to focus on, and critically consider, their personal understanding and experience of the EPQ. Because both students and staff found it relatively straightforward to comprehend, and because they found themselves being immediately invited to make value judgements about the EPQ, the task helped to put them at their ease in preparation for answering the more complex, probing interview questions and to feel more confident about the usefulness of insights and views they might want to offer. From the researcher's perspective, it provided a valuable opportunity for passive observation of respondents as they tackled the activity and for taking note of any comments or gestures made that might indicate how comfortable they felt about what they had been asked to do.

Overall, the activity was greeted with enthusiasm, though some adult and student informants later admitted to having found it challenging to impartially evaluate the reality of the EPQ in their own centre. Nevertheless, all took the activity seriously and none refused to participate. Consequently, 41 sheets were completed (n = 18 staff & 23 students).

Given that the size of the three EPQ student cohorts ranged from c.60 to c.1,200 and that the number of supervisors was similarly varied (c.12 to at least 30), it is clear that the findings from this exercise can only serve as a minute 'snapshot' of opinions within the respective centres. Nevertheless, within and across the centres, staff and student outcomes have been interesting to compare in order to detect any possible differences or similarities in their interpretations of the EPQ. In this respect, the findings have

been helpful during data analysis for acting as ‘indicators’ of possible issues to investigate further.

- **Opinion Finder: outcomes from whole informant sample**

- **Sections A & B: Opinions on the EPQ: Desired and Actual Impressions**

For each of the statements in Grids A and B below, staff and student opinions are shown per centre (SFC1-SFC3) by listing the number of votes given for each of the three options. The total number of responses relating to what individuals felt to be their **DESIRED** opinion of the EPQ is shown first, followed by the number of responses made when they were asked to give their **ACTUAL** estimation of the centre’s provision.

For example, regarding outcomes for Grid A, the **DESIRED** opinion of all 8 staff informants in centre SFC1 was that the EPQ should be seen as both an academic *and* vocational programme. Nevertheless, only 3 believed this to be the **ACTUAL** case for their centre, with 5 stating that the EPQ was treated solely as an academic qualification. In contrast, although the **DESIRED** opinion given by the majority of SFC1 student informants (n=6 of 8) was that the EPQ should be seen as an academic qualification, almost as many (n=5 of 8) considered that it was treated as both an academic *and* vocational qualification in their centre (i.e. their **ACTUAL** opinion).

GRID A	SFC1		SFC2		SFC3	
A. The EPQ is:	Staff: 8	Students: 8	Staff: 5	Students: 7	Staff: 5	Students: 8
An academic qualification	0 / 5	6 / 3	1 / 4	4 / 4	1 / 1	2 / 4
A vocational qualification	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0	1 / 0
Both academic and vocational	8 / 3	2 / 5	4 / 1	3 / 3	4 / 4	5 / 4

GRID B	SFC1		SFC2		SFC3	
A. The EPQ is:	Staff: 8	Students: 8	Staff: 5	Students: 7	Staff: 5	Students: 8
A passport to university	0 / 5	4 / 6	0 / 3	2 / 2	0 / 1	3 / 7
A passport to employment	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0	0 / 0
A passport to both	8 / 3	4 / 2	5 / 2	5 / 5	5 / 4	5 / 1

Table 5a: Opinions on the EPQ

- Section C: EPQ Opportunities

This section presents the findings relating to scores given by staff and students from each centre for each of the 10 ‘opportunity statements’ that respondents were invited to consider regarding the EPQ learning programme. For each statement, scoring was on the basis of: 1= LOW, 2=MEDIUM or 3=HIGH IMPORTANCE.

Firstly, however, in order to be able to make comparisons between the DESIRED and ACTUAL scores given for each of the opportunity statements in the Opinion Finder task, the table below (*Table 5b*) sets out the maximum scores that any one statement could attain, assuming that every respondent had scored it as a 3=HIGH IMPORTANCE. These figures are based on the total number of staff/students responding in each centre:

CENTRE	Staff – max. possible points	Students – max. possible points
SFC1	8 staff = 24	8 students = 24
SFC2	5 staff = 15	7 students = 21
SFC3	5 staff = 15	8 students = 24
TOTAL	18 staff = 54 points max.	23 students = 69 points max.

Table 5b: Maximum scores possible per statement

In the following four Tables (5c to 5f), the overall totals of 1s, 2s and 3s scored for each opportunity statement are set out. As with *Table 5a*, the DESIRED response total is provided first, and then the ACTUAL response total. Thus, DESIRED response scores given by staff from centre SFC1 (n=8) can be seen to be evenly distributed between medium and high importance on opportunity statement 1. However, when assessing the ACTUAL performance of their EPQ provision, their scores indicate a slightly more diverse range of opinion (LOW 1= 0/1; MEDIUM 2= 4/2; HIGH 3= 4/5). On the other hand, the scores of SFC1 students (n=8) suggest they may not be quite as convinced regarding both the DESIRED importance and the ACTUAL performance of the EPQ when compared with SFC1's staff respondents (LOW 1= 1/2; MEDIUM 2= 4/4; HIGH 3= 3/2).

	SFC1		SFC2		SFC3	
An EPQ offers opportunities for:	Staff: 8	Students: 8	Staff: 5	Students: 7	Staff: 5	Students: 8
1. extending learning from other courses, e.g. A levels, BTEC	1=0 / 1 2=4 / 2 3=4 / 5	1=1 / 2 2=4 / 4 3=3 / 2	1=1 / 1 2=2 / 0 3=2 / 4	1=2 / 3 2=3 / 2 3=2 / 2	1=1 / 2 2=2 / 1 3=2 / 2	1=1 / 0 2=3 / 2 3=4 / 6
TOTAL	20/20	18/16	11/13	14/13	11/10	19/22
2. investigating something unrelated to other programmes of study	1=2 / 2 2=4 / 3 3=2 / 2	1=4 / 2 2=4 / 4 3=0 / 2	1=0 / 2 2=4 / 1 3=1 / 2	1=1 / 3 2=3 / 2 3=3 / 2	1=0 / 0 2=3 / 2 3=2 / 3	1=2 / 0 2=3 / 4 3=3 / 4
TOTAL	16/14	12/16	11/10	16/13	12/13	17/20

Table 5c: Opportunities 1 and 2

	SFC1		SFC2		SFC3	
An EPQ offers opportunities for:	Staff: 8	Students: 8	Staff: 5	Students: 7	Staff: 5	Students: 8
3. personalised, student-centred learning	1=0 / 0 2=0 / 2 3=8 / 6	1=2 / 2 2=3 / 2 3=3 / 4	1=0 / 0 2=0 / 1 3=5 / 4	1=1 / 0 2=1 / 1 3=5 / 6	1=0 / 0 2=0 / 0 3=5 / 5	1=1 / 1 2=4 / 2 3=3 / 5
TOTAL	24/22	17/18	15/14	18/20	15/15	18/20
4. practising higher level/critical thinking	1=0 / 0 2=2 / 3 3=6 / 5	1=1 / 0 2=2 / 4 3=5 / 4	1=0 / 1 2=2 / 1 3=3 / 3	1=1 / 1 2=4 / 3 3=2 / 3	1=0 / 0 2=1 / 4 3=4 / 1	0=0 / 1 1=1 / 0 2=4 / 5 3=3 / 2
TOTAL	22/21	20/20	13/12	15/16	14/11	18/16

Table 5d: Opportunities 3 and 4

	SFC1		SFC2		SFC3	
An EPQ offers opportunities for:	Staff: 8	Students: 8	Staff: 5	Students: 7	Staff: 5	Students: 8
5. developing specific skills, e.g. research, project management	1=0 / 0 2=2 / 2 3=6 / 6	1=0 / 0 2=5 / 0 3=3 / 8	1=0 / 0 2=0 / 1 3=5 / 4	1=0 / 0 2=3 / 0 3=4 / 7	1=0 / 0 2=0 / 0 3=5 / 5	1=0 / 0 2=4 / 4 3=4 / 4
TOTAL	22/22	19/24	15/14	18/21	15/15	20/20
6. developing positive attitudes, e.g. to lifelong learning	1=0 / 1 2=4 / 4 3=4 / 3	1=3 / 2 2=5 / 5 3=0 / 1	1=1 / 2 2=2 / 2 3=2 / 1	1=4 / 3 2=2 / 4 3=1 / 0	1=0 / 0 2=1 / 3 3=4 / 2	1=5 / 4 2=2 / 4 3=1 / 0
TOTAL	20/18	13/15	11/9	11/11	14/12	12/12
7. developing positive behaviours, e.g. as independent self-starters	1=0 / 1 2=3 / 4 3=5 / 4	1=3 / 1 2=5 / 7 3=0 / 0	1=1 / 2 2=1 / 3 3=3 / 0	1=3 / 0 2=3 / 7 3=1 / 0	1=1 / 0 2=1 / 3 3=3 / 2	1=1 / 1 2=6 / 4 3=1 / 3
TOTAL	21/21	13/15	12/8	12/14	12/12	16/18

Table 5e: Opportunities 5, 6 and 7

	SFC1		SFC2		SFC3	
An EPQ offers opportunities for:	Staff: 8	Students: 8	Staff: 5	Students: 7	Staff: 5	Students: 8
8. active citizenship	0=0 / 1 1=5 / 7 2=3 / 0 3=0 / 0	1=7 / 5 2=1 / 3 3=0 / 0	1=5 / 5 2=0 / 0 3=0 / 0	1=6 / 5 2=1 / 2 3=0 / 0	1=2 / 3 2=3 / 2 3=0 / 0	1=6 / 4 2=2 / 4 3=0 / 0
TOTAL	11/7	9/11	5/5	8/9	8/7	10/12
9. engaging with business/work/career plans	1=2 / 4 2=4 / 3 3=2 / 1	1=3 / 2 2=3 / 5 3=2 / 1	1=1 / 2 2=4 / 1 3=0 / 2	1=3 / 3 2=3 / 3 3=1 / 1	1=2 / 3 2=3 / 2 3=0 / 0	1=1 / 2 2=5 / 6 3=2 / 0
TOTAL	16/13	15/15	9/10	12/12	8/7	17/14
10. local community involvement	0=1 / 1 1=5 / 6 2=2 / 1 3=0 / 0	1=8 / 6 2=0 / 2 3=0 / 0	1=5 / 4 2=0 / 1 3=0 / 0	1=7 / 7 2=0 / 0 3=0 / 0	1=2 / 2 2=3 / 3 3=0 / 0	1=6 / 6 2=2 / 2 3=0 / 0
TOTAL	9/8	8/10	5/6	7/7	8/8	10/10

Table 5f: Opportunities 8, 9 and 10

Using the results presented in *Tables 5c-f*, it is possible to compile a set of overall totals across all three case study centres for: a) all staff and all students together; b) staff only; and, c) students only; regarding each of the 10 opportunity statements. It thus becomes possible to determine a rank order of statements from HIGHEST to LOWEST in importance, according to the scores given by the respective types of respondent, firstly for their DESIRED opinion scores (*Table 5g*), and secondly for their ACTUAL opinion scores (*Table 5h*).

An EPQ offers opportunities for:

RANK	STAFF & STUDENTS (max. points = 123)	STAFF ONLY (max. points = 54)	STUDENTS ONLY (max. points = 69)
1ST	5. developing specific skills, e.g. research, project management (109)	3. personalised, student-centred learning (54)	5. developing specific skills, e.g. research, project management (57)
2ND	3. personalised, student-centred learning (106) 4. practising higher level/critical thinking (106)	5. developing specific skills, e.g. research, project management (52)	4. practising higher level/critical thinking (56)
3RD		4. practising higher level/critical thinking (50)	3. personalised, student-centred learning (52)
4TH	1. extending learning from other courses, e.g. A levels, BTEC (90)	6. developing positive attitudes, e.g. to lifelong learning (45)	1. extending learning from other courses, e.g. A levels, BTEC (48)
5TH	7. developing positive behaviours, e.g. as independent self-starters (85)	7. developing positive behaviours, e.g. as independent self-starters (44)	2. investigating something unrelated to other programmes of study (45)
6TH	2. investigating something unrelated to other programmes of study (84)	1. extending learning from other courses, e.g. A levels, BTEC (42)	9. engaging with business/work/career plans (44)
7TH	6. developing positive attitudes, e.g. to lifelong learning (81)	2. investigating something unrelated to other programmes of study (39)	7. developing positive behaviours, e.g. as independent self-starters (41)
8TH	9. engaging with business/work/career plans (77)	9. engaging with business/work/career plans (33)	6. developing positive attitudes, e.g. to lifelong learning (36)
9TH	8. active citizenship (53)	8. active citizenship (24)	8. active citizenship (29)
10TH	10. local community involvement (47)	10. local community involvement (22)	10. local community involvement (25)

Table 5g: Rank order of EPQ opportunity statements – DESIRED opinion scores

RANK	STAFF & STUDENTS (max. points = 123)	STAFF ONLY (max. points = 54)	STUDENTS ONLY (max. points = 69)
1ST	5. developing specific skills, e.g. research, project management (116)	3. personalised, student-centred learning (51)	5. developing specific skills, e.g. research, project management (65)
2ND	3. personalised, student-centred learning (109)	5. developing specific skills, e.g. research, project management (51)	3. personalised, student-centred learning (58)
3RD	4. practising higher level/critical thinking (96)	4. practising higher level/critical thinking (44)	1. extending learning from other courses, e.g. A levels, BTEC (52) 4. practising higher level/critical thinking (52)

4 TH	1. extending learning from other courses, e.g. A levels, BTEC (95)	1. extending learning from other courses, e.g. A levels, BTEC (43)	
5 TH	7. developing positive behaviours, e.g. as independent self-starters (88)	7. developing positive behaviours, e.g. as independent self-starters (41)	2. investigating something unrelated to other programmes of study (49)
6 TH	2. investigating something unrelated to other programmes of study (86)	6. developing positive attitudes, e.g. to lifelong learning (39)	7. developing positive behaviours, e.g. as independent self-starters (47)
7 TH	6. developing positive attitudes, e.g. to lifelong learning (77)	2. investigating something unrelated to other programmes of study (37)	9. engaging with business/work/career plans (41)
8 TH	9. engaging with business/work/career plans (71)	9. engaging with business/work/career plans (30)	6. developing positive attitudes, e.g. to lifelong learning (38)
9 TH	8. active citizenship (51)	10. local community involvement (22)	8. active citizenship (32)
10 TH	10. local community involvement (49)	8. active citizenship (19)	10. local community involvement (27)

Table 5h: Rank order of EPQ opportunity statements – ACTUAL opinion scores

When interrogating the results shown in the Tables above for significant trends, similarities or differences, it is important to bear in mind the likely impact on research reliability regarding the small size and limited make-up of the sample involved in the Opinion Finder activity. Nevertheless, it is interesting to note a number of similarities emerging as to the ways in which the EPQ's usefulness is interpreted across both groups and to note these for later comparison with other data sources such as interview responses and observations. For example, in terms of their DESIRED *and* ACTUAL opinion scores, both staff and students rank the programme most highly for the 8TH opportunities it provides for building personalised, student-centred learning experiences, developing specific skills related to project management and research, and for enabling students to practise higher level/critical thinking skills. Both groups also appear in harmony with their perception that it provides ACTUAL benefits in terms of extending students' learning from other courses (staff = 4th; students = joint 3rd) although, for staff, their DESIRED opinion would seem to be that it is more important that the EPQ should help to develop positive attitudes and behaviours (ranked 4th and 5th) before being

used for extending learning from elsewhere (6th). In contrast, with regard to their DESIRED opinions, the students rank the development of positive behaviours and attitudes in 7th and 8th places and appear to favour more the hope that the EPQ can offer opportunities to investigate something unrelated to their studies (students = 5th; staff = 7th) and to engage with business, as well as work-related and career pathways (ranked 6th by students), an aspiration ranked only 8th by staff. Comparing these rankings with the ACTUAL opinion scores for students, it would appear that, for them, the EPQ programme does in fact fulfil their aspirations to a reasonable degree, although they may perhaps consider that 'developing positive behaviours' has more of a profile in their studies (6th) than does 'engaging with business' (ranked 7th). Similarly, where staff are concerned, the EPQ's capacity for extending learning from other courses would appear to be stronger in ACTUAL terms than they might have expected, given that it is now ranked 4th. Significantly, both staff' and students' DESIRED *and* ACTUAL perceptions merge once more when considering ways in which the EPQ holds least usefulness for them. For both groups, opportunities for practising active citizenship or being involved with local community representatives are ranked in 9th and 10th places in terms of their desirability, and are perceived as occurring only rarely in their actual experiences of EPQ enactment (staff = 10th/9th; students = 9th/10th).

In the following accounts of case study centre findings, Opinion Finder results pertaining to each specific institution will be presented in turn.

- **Opinion Finder: SFC1 outcomes**

Sections A & B: Opinions on the EPQ: Desired and Actual Impressions

In SFC1, staff (n=8) were unanimous in their DESIRED opinion that the EPQ should be both an academic and a vocational qualification. However, in

ACTUAL terms, 5 believed it to be more of an academic qualification, with only 3 perceiving it as both academic and vocational. Nobody perceived it as purely vocational. Conversely, the majority of students (n=8) DESIRED it to be an academic qualification (6) with only 2 agreeing with staff perceptions that it was both academic and vocational. Nevertheless, when considering the ACTUAL situation at their centre, their opinions shifted to 'both academic and vocational' (5) with 3 perceiving it as solely academic.

These perceptions were echoed in responses given as to whether the EPQ is a passport to university, employment or both. Staff scored exactly the same again in both their DESIRED and ACTUAL opinions, being unanimous in their initial opinion that it should be a passport to both destinations, and then recognising that in their centre, the emphasis was more on it being a passport to university (5:3). Students, however, were evenly split in their DESIRED opinion that it was a passport to university (4) and to both destinations (4). For 6 students, the former destination was perceived as dominating EPQ enactment in their ACTUAL context, with only 2 maintaining their conviction that it was a passport to both destinations.

Section C: EPQ Opportunities

With regard to SFC1 staff and student perceptions of the DESIRED and ACTUAL opportunities to be gained through participation in the EPQ learning programme, some interesting observations can be made. For example:

- 'Personalised, student-centred learning' was ranked 1st by staff, both on a DESIRED and an ACTUAL basis, although this did not concur with student opinions; they ranked such opportunities as 4th (DESIRED), and 3rd (ACTUAL) at their centre.
- 'Practising higher level/critical thinking' was ranked joint 1st (DESIRED) by students, and in 2nd place by staff; however, both staff and students

considered ACTUAL opportunities to be slightly less prevalent in their own centre (students = 2nd; staff = 3rd).

- 'Developing specific skills' such as research and project management was ranked 2nd (DESIRED) and 1st (ACTUAL) for both staff and students.
- 'Developing positive behaviours' was clearly more DESIRED by staff (4th) than by the students (6th); moreover, student views did not alter (ACTUAL = 6th) even though staff ranked it slightly higher at their centre than they perhaps had expected (ACTUAL = 3rd).
- Then again, both staff and students were virtually in agreement about the EPQ's limited potential to offer DESIRED and ACTUAL opportunities for 'developing positive attitudes' (staff = 5th/6th; students = 6th/6th).
- With regard to its potential for offering opportunities to investigate 'something unrelated to other programmes of study', neither staff nor students appeared to be expecting this from the EPQ (DESIRED = 7th and 8th); however, whereas staff did not vary in their opinion of the ACTUAL situation at their centre, students expressed a more optimistic view (4th).
- SFC1 students appeared to expect the EPQ to help them by 'extending learning from other courses' (DESIRED = 3rd) more than staff (5th) although they were less positive about their ACTUAL experience (4th), as were staff (5th).
- Both staff and students agreed that the least DESIRED and ACTUAL attributes of the EPQ related to opportunities for developing 'active citizenship' and 'local community involvement'; however, students were more keen about 'business/work/career' engagement opportunities (DESIRED = 5th) than staff (7th), even though they rated the ACTUAL circumstances as less positive (students = 6th; staff = 8th).

Overall, apart from differing opinions on the amount of opportunities for developing ‘personalised learning’ and ‘investigating something unrelated to other programmes of study’ in the EPQ programme at SFC1, the level of agreement between staff and students appeared to be fairly constant.

- **Opinion Finder: SFC2 outcomes**

Sections A & B: Opinions on the EPQ: Desired and Actual Impressions

In SFC2, the majority of staff (n=5) expressed their DESIRED opinion that the EPQ should be both an academic and a vocational qualification (4) with just one respondent perceiving it to be solely academic. However, when asked to rate the ACTUAL situation of their centre’s programme, this attitude was completely reversed, with only 1 maintaining that it was both academic and vocational and 4 perceiving it to be solely academic. On the other hand, students (n=7) were more evenly split in that 4 DESIRED it to be an academic qualification and 3 perceived it as both academic and vocational. Interestingly, these perceptions were unchanged when the students were asked to rate the ACTUAL EPQ programme at their centre. No students or staff perceived the programme as solely a vocational qualification, either in their DESIRED or ACTUAL responses.

With regard to responses given at SFC2 as to whether the EPQ is a passport to university, employment or both, staff were unanimous in their DESIRED opinion that it should be a passport to both destinations. Even so, they perceived that the ACTUAL circumstances of their centre were not so clearly delineated, with 3 staff scoring it as a passport to university whilst 2 remained convinced that it could be a passport to both. In this respect, students differed from staff perceptions in that the majority maintained, from both the DESIRED

and the ACTUAL perspective, that the EPQ was viewed at their centre more as a passport to both university and employment (5) than to university alone (2).

Section C: EPQ Opportunities

SFC2 informants' perceptions of the DESIRED and ACTUAL opportunities to be gained through participation in the EPQ raised some interesting points, particularly regarding the close agreement shown on several occasions between staff and student responses:

- 'Developing specific skills' such as research and project management was ranked 1st (DESIRED and ACTUAL) for both staff and students.
- 'Personalised, student-centred learning' was ranked joint 1st (DESIRED) by both staff and students, and opinions remained very similar in terms of rating the ACTUAL circumstances at SFC2 (staff = 1st; students = 2nd).
- The EPQ's potential for offering opportunities to investigate 'something unrelated to other programmes of study' was more DESIRED by students (3rd) than staff (5th) but they were in agreement that this benefit was not as prevalent in their ACTUAL experiences of the EPQ (staff and students = 5th).
- Staff and student opinions were also similar regarding DESIRED and ACTUAL opportunities for 'Practising higher level/critical thinking' (staff = 3rd/4th; students = 4th/3rd).
- For staff, although opportunities for developing 'positive attitudes' and 'positive behaviours' were DESIRED benefits of the EPQ (ranking 5th and 4th), they were less convinced that opportunities for either arose as regularly as other attributes in their centre's programme (ACTUAL = 7th and 8th).
- For students, 'positive attitudes' ranked much lower as a DESIRED outcome of the EPQ (8th) than for staff, as did 'positive behaviours' (6th); however,

they considered the latter to be far more prevalent in their centre's EPQ than did staff (ACTUAL = 4th) but tended to agree with them regarding 'attitudes' (8th).

- Both staff and students rated the EPQ at 5th (DESIRED) for its potential to offer opportunities for 'extending learning from other courses', though staff were more optimistic about their ACTUAL programme (3rd) than students (5th).
- Staff and students were virtually unanimous in their rating of opportunities for developing 'active citizenship' and 'local community involvement' as the least DESIRED *and* ACTUAL attributes of the EPQ.
- However, students were more keen about 'business/work/career' engagement opportunities (DESIRED = 6th) than staff (8th), even though staff rated the ACTUAL circumstances as more positive (5th) than did students (7th).

- **Opinion Finder: SFC3 outcomes**

Sections A & B: Opinions on the EPQ: Desired and Actual Impressions

In SFC3, when asked to declare their DESIRED opinion, the majority of staff (n=5) maintained that the EPQ should be both an academic and a vocational qualification (4) with only 1 individual perceiving it to be solely academic in nature and purpose. Moreover, when asked about the ACTUAL circumstances of the EPQ at their centre, these opinions remained unaltered. However, student views (n=8) were more varied. When asked about their DESIRED opinions, the majority agreed with staff that the EPQ should be both an academic and a vocational qualification (5) although 2 students perceived it as solely academic and 1 believed it to be a primarily vocational qualification. Nevertheless, when considering the ACTUAL situation of the EPQ at their

centre, student opinions shifted to an even split between ‘both academic and vocational’ (4), and solely academic (4).

Staff perceptions for question A were echoed in their responses to question B – whether the EPQ is a passport to university, employment or both. On this occasion, staff were unanimous in their DESIRED opinion that the EPQ should act as a passport to both destinations, and very little change was made to their responses when considering its potential in their own centre, with the majority still perceiving it as a passport to both university and employment (4) and just 1 individual seeing it more as a passport solely to university. Students’ perceptions in this respect, however, quite significantly differed from staff perceptions. Initially, their DESIRED opinions about the EPQ showed a majority in favour of the EPQ as a passport to both destinations (5), with 3 students considering it as more suited to the university route alone. However, when asked about their perceptions regarding the ACTUAL situation of the EPQ in their centre, virtually all the students (7) stated they considered it to be used as solely a passport to university in SFC3, with just 1 individual believing it to be used as a passport to both destinations.

Section C: EPQ Opportunities

For the most part, SFC3 informants’ perceptions of the DESIRED and ACTUAL opportunities to be gained through participation in the EPQ learning programme appeared fairly similar. However, there were a small number of noticeable differences of opinion between staff and students:

- ‘Developing specific skills’ such as research and project management was ranked 1st (DESIRED) by both staff and students, with staff maintaining their opinion regarding the ACTUAL situation, and students rating it in joint 2nd place.

- 'Personalised, student-centred learning' was also ranked joint 1st by staff, both on a DESIRED and an ACTUAL basis, but student opinions were slightly less favourable at 3rd (DESIRED) and joint 2nd (ACTUAL).
- However, with regard to 'extending learning from other courses', students' DESIRED expectations of the EPQ were far higher (2nd) than those of staff (7th); moreover, their opinion of the EPQ programme at SFC3 was far more positive in this respect (ACTUAL = 1st) than that of staff (ACTUAL = 7th).
- Similar opinions were expressed regarding 'Practising higher level/critical thinking' which was ranked 3rd (DESIRED) by both staff and students; however, both groups also considered ACTUAL opportunities for this to be much less prevalent in their own centre, ranking it in 6th place.
- A further area of considerable difference was noted with regard to 'Developing positive attitudes' which was far more DESIRED by staff (3rd) than by students (8th); moreover, student views did not alter (ACTUAL = 8th) even though staff ranked it 4th (ACTUAL) at their centre.
- On the other hand, both staff and students were slightly more in agreement about the EPQ's potential to offer DESIRED and ACTUAL opportunities for 'developing positive behaviours' (staff = 5th/4th; students = 7th/5th).
- With regard to the EPQ's potential for offering opportunities to investigate 'something unrelated to other programmes of study', both staff and students agreed on its DESIRED value (5th); they also felt that this was a prominent characteristic of their ACTUAL experience of the EPQ (staff = 3rd; students = 2nd).
- 'Active citizenship' and 'local community involvement' opportunities were viewed as the least DESIRED and ACTUAL attributes of the EPQ for both

staff and students, although students were more inclined than staff to see active citizenship opportunities in their centre's programme.

- 'Business/work/career' engagement opportunities appeared to be a more important factor for students (DESIRED = 5th) than for staff (joint 8th with citizenship and community involvement); however, both groups indicated less positive opinions about their centre's EPQ (students = 7th; staff = 9th).

-5.2.2 Aspects of leadership: centre findings

- **SFC1 informants' views – on leadership**

The Principal of SFC1 had been in post for just over eight years when fieldwork visits took place. On arrival, he had been excited to discover that some of the EPQ pioneering work had been conducted there, as he was aware of its positive impact in other colleges. However, he admitted to not having had any involvement in it in terms of teaching or supervising, although he does attend Presentation Events:

“I've been very involved with the strategy of how we use it, how it plays a part in students' programmes and what merits it offers that relate... the attitude of HE to the EPQ and, therefore, the way it might open up opportunities for people.” (Josh1)

In addition, he has been proactive about finding opportunities to promote the EPQ with feeder schools and with parents (a point later endorsed by Farida1):

“I think I've been very much at the heart of trying to develop it as a part of our curriculum.” (Josh1)

When asked about his approach to leadership, Josh1 suggested that colleagues might not describe it in quite the same way as he might but that it was based on distributed leadership principles:

“I think that we work very much as a senior team, so very few decisions are made by me without having been agreed by the senior team in the college ... What I’m looking towards is a more distributed leadership from the middle. I think we’ve got some way to go before we really have achieved that...” (Josh1)

In keeping with his leadership style, Josh1 was keen to emphasise his desire to be readily accessible to all and to maintain an ‘open door’ policy:

“But it’s a big place and so, whether people actually do feel there’s accessibility, I don’t know – I’m not so convinced.” (Josh1)

This aspiration to openness and collaboration was also reflected in the culture and ethos of the college, from Josh1’s perspective:

“I think it’s a very healthy culture and ethos. I think, generally speaking, it’s a ‘can do’ kind of place – and it’s a ‘support’ kind of place where the interactions between staff and students are probably amongst the best I’ve ever come across. And almost every member of staff has a genuine commitment to wanting to do their best by the students.” (Josh1)

Nevertheless, he went on to observe that the students tended to be slightly lacking in self-confidence, aspiration and even application. When asked about this, he observed that some:

“...put their own barriers on themselves and we have to try and break some of those and unshackle them a bit and help them to see what is possible.” (Josh1)

Given that students only remain in FE for a comparatively short time, this is a difficult task. On an optimistic note, however:

“I can see a positive journey towards higher aspirations, harder working students and probably more challenge in our curriculum and our expectations.” (Josh1)

With regard to his strategic plans, Josh1 was clear that his priority – and the focus of all current staff development work – was the creation of a ‘learning community’ benefiting all staff, students, parents and governors, then in its second year of development:

“It’s the idea that in a community such as this, there is a merit in our all being open to learning and self-development, and that that culture is one which should feed each other – so it should be a virtuous circle.” (Josh1)

In particular, for the students:

“We’re looking at trying to build their capacity to be independent, self-directing, self-motivated learners ... it is about how our students are able to describe their own learning and reflect upon their own learning and from that, to learn and to set themselves new objectives.” (Josh1)

To this end, particular focus had been placed on Guy Claxton’s concept of building learning power, as well as the introduction of pre-work and pre-learning research tasks, approaches later witnessed by the researcher during library-based, observed lessons and endorsed by other interviewees (Mary1; Linus1). Investments in online and digital resources had been made to enable this. Interestingly, however, although the EPQ learning programme so clearly harmonises with and supports the centre’s strategy for learning, the Principal was still of the opinion that the course should remain optional.

For Mary1, a member of the SLT responsible for the EPQ programme and for line managing the lead EPQ Coordinator, her perception of the centre’s overall vision is closely tied to the EPQ’s purpose:

“It is to meet the needs and interests of learners – and I think the EPQ does fit within that, in terms of need, because for some it’s career progression, some may need points for universities [or] to support personal statements. Others are just interested in doing something a bit different ... it’s an opportunity to go off-piste, to just explore.”
(Mary1)

She echoed the Principal’s comments on utilising Claxton’s ideas for developing the learner and directly related this to the benefits of the EPQ:

“I don’t see it as an exam, I don’t see the outcome as so important – I do genuinely see the process and, in terms of the ethos of the college and what we’re trying to do, we are working ... to developing the learner, not just delivering a lot of content.” (Mary1)

Moreover, in her opinion, the EPQ was the key reason that college HESA graduate outcomes had exceeded those of many other institutions.

Harriet1 had only recently assumed the role of lead EPQ Coordinator, and was juggling many other subject responsibilities, meaning she was unable to act as an EPQ Supervisor, although she would have appreciated the experience. Her impression of the centre was similar to that of the Principal, with some reservations:

“I think it’s a very positive place to work. It is a supportive place but it is very results-driven these days in terms of Ofsted ‘Outstanding’ and things like that. But I think there is a ... yeah, like a very hard-working ethos.” (Harriet1)

As was her interpretation of the SLT vision for the college, which was shared with EPQ Supervisors such as Farida1 and Linus1:

“To be outstanding, good added value, to make them lifelong learners with a new focus on making them kind of independent, resilient

learners that can think on their feet. That's the new drive – we really want to prepare them for university and life.” (Harriet1)

In the same vein as Mary1, Farida1, an experienced EPQ Supervisor specialising in Business-related project topics, commented that the EPQ was probably more closely aligned to the centre's culture and ethos than ever before, due to the focus on building a learning community:

“Because we're really focusing on students becoming independent learners – and becoming more resilient and having... we've done a lot of work on things like having a growth mind-set.” (Farida1)

- **SFC2 informants' views – on leadership**

The Principal at SFC2 had enjoyed more than twenty years in senior leadership roles there and clearly recalled a time prior to the EPQ's inception when he was instrumental in promoting and running a similar type of project-based learning activity for A level students. Because of its popularity and the esteem in which it was held, there had been some initial reluctance to move to the EPQ. Significantly:

“I suppose since we've adopted it as part of our curriculum offer, I've not been involved with its development directly.” (Steve2)

As a result, he was reluctant to suggest ways in which the EPQ might be improved, deferring to: “...those who've got a much better knowledge of the qualification than I have”. Nevertheless, his continued enthusiasm for the kind of learning that takes place in the EPQ, and its predecessor, was abundantly evident:

“The EPQ fits brilliantly into a college which prides itself on being student-centred, wants to encourage students and staff to take risks ...

Now, the EPQ gives them an opportunity to take the roof off learning and take it as far or wherever they're able to take it. Now, that's a wonderful thing and it's absolutely consummate with what we're trying to do as a college." (Steve2)

Moreover:

"The EPQ is something that we do purely and simply because we think, educationally, it's a valuable thing to do." (Steve2)

When asked about his leadership style, Steve2 considered that:

"I can only operate in teams so I'd say I was affiliative, democratic... those would be my primary characteristics, I think." (Steve2)

For him, given the current financial climate, which had already led to a reduction in capacity, distributed leadership was the only way of managing his responsibilities – no Principal could do everything alone:

"I trust the SLT implicitly; I ask awkward questions of them, they give me the right, straight answers." (Steve2)

As for the whole staff, the college's culture was one in which people knew they could act independently but that they were also accountable. What they did would need to be presented and would be open to scrutiny – a culture which he hoped: "...actually does emanate from me." Also, that:

"I think 'community' is my word – I think it's written through everything I do, everything I've done as Principal So, for me, the positioning of the college has been much more as a community college working *in* the community than as a beacon or some sort of 'ivory tower island' in the community." (Steve2)

However, one concern was how much less connected to the college he now felt as Principal, compared with his previous experience as Vice Principal (VP).

Previously, much of his time would be taken up with 'looking inward' but this had changed entirely:

"Talking to HODs, Directors of Faculty – looking at enabling initiatives... [whereas] the job of Principal requires you to spend more time dealing with the PR, with the politicians, with the management of the external-facing stuff and that takes a lot of your time inevitably away from looking inward." (Steve2)

The views of the current VP, Vernon2, reflected and enhanced those voiced by the Principal. For him, the culture and ethos of the college was:

"...one of wanting to work and wanting to do better. It's very strongly about that. It's about high achievement, high aspiration." (Vernon2)

He explained that SFC2 was particularly proud of its reputation as a "research-focused college" for which it had won awards. He referred to the work of Claxton and Dweck as being strongly influential on teaching and learning developments, as were theories such as 'habits of mind', 'attribution theory', 'emotional intelligence' and, particularly, 'transaction analysis':

"I think you would see that in the way the college 'is' – we're very much adult to adult. We're very aware of that ... I suppose it leads to distributed leadership because everyone is a leader in the college. It's not about me, it's not Steve2 – there are loads of leaders all over the place and everyone's actually responsible for the quality of the stuff that goes on here." (Vernon2)

One such leader, Ravi2, had led the EPQ for more than three years, having taken over at a time when the number of students enrolling on it had been expanding. His predecessor had been unpaid and in a voluntary position but this had since changed. For Ravi2, the college culture and ethos was primarily

about promoting independent learning and freedom for students to make decisions on how they want to learn:

“...so, one thing that I think the EPQ fits in well with is the independent component of being a student at university.” (Ravi2)

In terms of his own leadership style, Ravi2 had to be firm, to stick up for what he needed to run the programme effectively, but prepared to compromise when necessary:

“Because of the Moodle course, we use Google Docs [*in the EPQ*]; I demand – well, I’ve asked for – all the classrooms to have enough computers for the students to use, which isn’t always easy and last year was a bit of a struggle.” (Ravi2)

Where students were concerned, when they complained about the pressure of other subjects and commitments alongside the EPQ, his attitude was:

“The thing we keep saying is, ‘You’re the one that’s responsible for that – you’ve chosen to do this, and you’ve chosen to do this other thing, and you’ve done a lot!’ A lot of the students have chosen to do three different extra-curricular activities *and* four A levels and it’s their responsibility to make it work. But, yeah, that can be a challenge.” (Ravi2)

When asked about their experience of the college’s culture and ethos, EPQ Supervisors Desreen2 and Paul2 both testified to the support given to students to help them achieve to the best of their ability:

“The ethos and culture is very student-focused – the student is the most important person – and so that’s a very positive thing.”

Like Ravi2, Paul appreciated the encouragement to innovate which had helped teachers such as him to enjoy their work:

“Students, therefore, are more likely to enjoy their lessons because the teachers feel free to some extent to do things in different ways.”

(Paul2)

- **SFC3 informants’ views – on leadership**

Like Steve2, Leanne3 had held a number of senior management positions over many years at SFC3 before assuming the role of Principal, almost ten years ago. Unlike the other two Principals, she had been heavily involved as an EPQ Supervisor ever since the centre introduced the L3 qualification and had therefore witnessed its transformation at first hand:

“When we started, we were mainly concentrating on academic, dissertation-type projects and we then opened up to ‘anything goes’ – absolutely anything that actually fits the assessment criteria. And obviously, given their flexibility, most things do.” (Leanne3)

When asked about her leadership style, Leanne3 commented:

“I would say that I am a fairly democratic leader, one who wishes to distribute leadership, one who wishes to encourage leadership across the college and, yes, I think that’s ... by empowering people. Making sure that you have the right people in the right places, supported in what they’re doing and giving them their heads to really make a difference, so you do then get a lot of new ideas.” (Leanne3)

She believed her style of leadership to be clearly reflected in the centre’s culture and ethos which she described as being a ‘really strong learning community’:

“...there is a lot of passion for learning amongst students *and* staff. I think staff see themselves as learners as well as students and I really do

think there is a strong commitment to relationships, respect and learning and I think, although we have a few more values listed in our ethos than that, I think that's what most people would say." (Leanne3)

Of paramount importance, however, was the learning – nothing must disrupt that and everyone was expected to support it. In fact, one resourceful way she had found to tackle the negative impact of increasing financial constraints on teaching and learning in the centre was both reminiscent of the 'experimentation' approach adopted at SFC2 and of the EPQ's nature:

"Just trying to get people to do a sort of action research-based approach to projects or tasks that you can actually then build and influence the curriculum development... and that's worked incredibly well with a number of things." (Leanne3)

In particular, independent learning had been a key part of strategic thinking at SFC3 for many years and, for Leanne3, this was why they so strongly promoted the EPQ:

"This seems to us to be almost the best tool you can have to develop their independent learning. And real independent thinking as well – it's just doing it themselves." (Leanne3)

For students, the EPQ experience provided many of the other benefits the college sought for their intake:

"Excellence is obviously there in abundance and that's something we always want to look at – innovation, creativity, encouraging students that they will learn through making mistakes ... and encouraging them to push themselves out of their comfort zone." (Leanne3)

Nevertheless, as Principal, she was clearly aware that much of the success of the huge programme at SFC3 depended on the leadership skills and qualities of the lead EPQ Coordinator:

“When we first said we were going to do whole cohort EPQ to our fellow SFC colleagues, they said, ‘Hmmm!’ but I said, ‘Yes, but we’ve got a Naomi!’ And obviously she has embedded such that it *will* be sustainable.” (Leanne3)

Like Leanne3, Jenny3 (SFC3’s Vice Principal) was also an EPQ Supervisor. In addition, she line managed the lead EPQ Coordinator and was responsible for the programme. Her positive attitude was summed up in the fact that she, like Mary1, attributed a large part of the college’s outstanding performance in terms of HESA graduate outcomes to the EPQ:

“I would definitely describe myself as on the enthusiasts’ side!”
(Jenny3)

Her view on the centre’s culture clearly reflected that of the Principal but enhanced it to include: “...expectations around independence and maturity that we hold for our students”. Further, she saw the “hallmark of what we do” as being:

“...a college that is very much a halfway house between school and university or school and employment, so we’re looking for them to make that adult-width transition over the 19 months that they’re with us, start to finish.” (Jenny3)

She strategically linked the college’s ethos to the EPQ and had regularly used the programme to demonstrate to others what the SLT’s ‘vision’ was about:

“I suppose, in ethos terms, we do have high expectations of our students’ motivation, independence and the quality of what they’re achieving under their own steam – which obviously fits really well with the EPQ.” (Jenny3)

Moreover, the fact that she, the Principal and the lead EPQ Coordinator, were all EPQ Supervisors clearly demonstrated the strong senior management support underpinning the ethos:

“Every one of us is right in there with teaching the EPQ and really believing in it so that, when we’re talking to students and parents, we’re talking from a point of real belief and knowledge and expertise over the years, in terms of ... it’s not just that we say that it’s a good thing, we really believe that it’s a good thing and we can demonstrate how, I suppose. So, you know, I think that’s really critical.” (Jenny3)

During her interview, Naomi3 (lead EPQ Coordinator) expressed many of the same opinions as Leanne3 and Jenny3 with regard to the culture and ethos of the centre, adding that it was:

“Very much about breadth of the curriculum; so we champion breadth of the curriculum and we champion education not being just for exams – which is why obviously we are where we are.” (Naomi3)

Having been at the centre for ten years, Naomi3 had seen many changes over time but, despite cuts and constraints, felt that college ethos had altered little, in part because the size of the institution worked in its favour. She observed that the SLT ‘vision’ for the college was not only communicated through the strategic plan but also through the students’ study programme and the fact that team members were so heavily involved in it.

With regard to her own professional practice as leader of the learning programme, and senior staff member at SFC3, Naomi3 had a number of strategies in place to enable her to manage a substantial cohort of 25 EPQ Supervisors and more than 1,000 students. For example:

“I’m in the process of introducing some learning walks ... we do have progress reviews, we do have a system where I ask [*supervisors*] to

reflect on the students at given points in the year and to give them an effort grade so that I can then pick up students that are a problem.”
(Naomi3)

In addition, she had established a very stringent process for identifying and swiftly dealing with any student causing concern, in order to settle them back quickly into the course. Asked about the skills she felt to be essential for her job, she observed:

“You need to have structure but you also need to be flexible enough to put that aside. And you need to be able to think quite creatively in terms of being able to advise the [*supervisors*] and them being able to advise the students. [*Being a supervisor*] can be a very insecure place to be, so you need to have the structure in place, but the flexibility within it.” (Naomi3)

When asked about their views on centre culture and ethos, the EPQ Supervisors interviewed at SFC3, Guy3 and Tanisha3, both summed it up as being supportive – a place: “...where everybody wants to help everybody” (Tanisha3) – and inclusive:

“If you come in feeling you’re part of a minority, for example you identify as LGBT, actually you find a home here.” (Guy3)

For Tanisha3, who had worked at SFC3 for more than twenty years, this also meant:

“Our personal lives are important, the work-life balance is important, there’s lots of stuff going on about what it’s... you know, we’re able to give suggestions about what we can do to improve that. We’re allowed to take risks, calculated risks...” (Tanisha3)

Her opinions clearly reflected the aspirations and values expressed by SFC3 SLT, as did those of Guy when asked his views on leadership at SFC3:

“Even the two union reps will recognise that we’re managed very, very well because they take a lot of care about personal relationships – and we’re encouraged to take a lot of care about relationships with the students.” (Guy3)

Tanisha commented that the Principal was “an incredibly human person” who was genuinely interested and cared about one, both as a member of her staff and as a person:

“I think [*Leanne3*] does a really good job of leading us in a way where we feel like she’s really genuinely leading us. So if we have difficult things to talk about, she’s able to talk about them with us on a very human level.” (Tanisha3)

She also described as “Brilliant!” the fact that *Leanne3* and *Jenny3* both taught on the EPQ programme.

- **Reflections on findings**

Views expressed by all three Principals would suggest that there are strong similarities in terms of their values and leadership styles and approaches. All attest to practising distributed leadership, confirmed by the majority of other interviewees, and all aim to develop their centre’s culture and ethos as a ‘learning community’, in which independent learning and thinking (SFC3), self-development and ‘can do’ are seen as the keys to empowerment, underpinned in both SFC1 and 2 by the influence of theorists such as Claxton and Dweck.

With regard to the EPQ and its place in their centres, it is interesting to note that the two Principals more familiar with the EPQ (*Steve2/Leanne3*), as well as the SLT members at all three centres and the two more experienced lead EPQ Coordinators (*Ravi2/Naomi3*), immediately linked the qualification’s aims to the cultural aims of their institution to illustrate how they complement each

other. This is significant as it would suggest a clear sense of purpose has been identified and communicated for the EPQ (translation), based on what it can do for each respective centre, above and beyond being ‘just another qualification’. Moreover, this may in part explain why, in all three centres, the EPQ appears to have been interpreted as being more to do with – and therefore located in – enrichment provision than with the actual subject curriculum, even though it is a qualification equivalent to half an A level and carries UCAS points, unlike other enrichment activities available to students.

- 5.2.3 Issues of power and empowerment: centre findings

- **SFC1 informants’ views – on power**

Discussions on leadership with the Principal at SFC1 yielded some interesting observations about relationships between ostensibly ‘powerful’ SLT members and middle managers, such as the lead EPQ Coordinator:

“...I’m very conscious of the fact that it’s easy for a senior team to be kind of ahead of where the staff are and how they feel ... and I think one of the reasons is because the drivers over things like costs often mean that decisions have to be taken which wouldn’t necessarily be those that the middle [*managers*] would choose...” (Josh1)

This could often result in:

“...a tension between having to make decisions about reducing costs in order that the college can continue to thrive on the one hand, and also asking for leadership from the heads of the curriculum who, of course, understand best what is going on in their curriculum area and so understand best what’s going on in the teaching...” (Josh1)

Josh1 also raised an important point about the power held by prospective students in that the number of enrolments must increase year-on-year in order to preserve the college's financial viability. If not, its future would be threatened:

“Fundamentally, the place can only exist because of the students who come to it... I really do believe that students have a ‘jungle drums’ system which means that if their experience is not a good one, they and their peer group, and the people slightly younger than them, know about it.” (Josh1)

His response to this constant threat had been to focus entirely on what he perceived as being the core business of the college – the curriculum, ensuring its appropriateness for the type of students enrolling, monitoring their classroom experiences and the attitude of staff towards them – in order to sustain a healthy environment and to build success.

For Farida1, empowering the students through activities such as student voice surveys was an effective means of building the college ‘learning community’, as well as encouraging students to become more resilient and to work harder:

“The staff are working very, very hard and we’re trying to get [*the students*] to see that if they become independent, if they take ownership of their learning more ... and getting more student involvement as well. Things like student voice, for example – trying to learn from what *they* want as well.” (Farida1)

Information gleaned from regular student voice surveys was included in course reviews and teaching and learning meetings and was used to determine what staff would do differently in the future:

“This college has got a very highly qualified, shall I say, very good, quite committed staff and I think it’s fair to say that people really do care about how students achieve and perform.” (Farida1)

- **SFC2 informants’ views – on power**

An interesting perspective on the power held by the Principal emerged at SFC2 when Steve2 described the type of people he preferred to appoint:

“I only appoint people that I think are good, can do a good job; and I see the staff as part of a family of learners itself – a community in itself. And so that, I think, is reflected in how I approach people with other people.” (Steve2)

For him, the priority was to appoint people one could trust: “...and then you support and encourage them to get on with the job”. Thus, through distributed leadership can – or perhaps, should – come distributed power:

“Distributed leadership... you’ve spoken to Ravi2 who runs the EPQ? *He* runs the EPQ. Now, if he’s got an idea, he’ll float it past Vernon2 [*line manager*] and my favourite word is, ‘Yes!’ I’d rather we say yes to innovation – it’s not a risk-averse culture in this college, I want people to try something new because they *might well* change the paradigm.” (Steve2)

Vernon2, when speaking about the culture and ethos of the college, drew a clear parallel between the ‘vision’ and empowerment of staff and students:

“We don’t want limits to what students can achieve here; we don’t want limits to what staff can achieve here. We want everyone to do the best they can for themselves and develop themselves.” (Vernon2)

To this end, despite the pressure of financial cutbacks, the staff development budget had still not been touched:

“That whole thing is always about improving teaching and learning, and improving achievement.” (Vernon2)

Ravi2 endorsed the attitude, expressed by Steve2, that staff members were actively encouraged – empowered - to take the initiative:

“There’s an attitude ... from the senior staff that you ‘can do’ things – as a teacher, if you go and say ‘I’d like to do this’, they usually will be quite happy to say ‘Yes, that’s a good idea, let’s do it’.” (Ravi2)

As a result, much transformational experimentation had emerged, such as: “...delivering lectures rather than just taught lessons”. On a more negative stance, however, was the reluctance of staff to be observed, which constrained Ravi2’s ability to monitor EPQ sessions:

“I think it’s viewed – and probably quite rightly – as being an opportunity for managers to beat teachers with sticks...” (Ravi2)

A way around this problem had been to institute ‘learning walks’ instead, a strategy also used by Naomi3:

“And I’d like, with the EPQ, to have the attitude where it’s OK if I just wander into a class and just say, ‘Is everything alright? How are you getting on?’ But staff members still sometimes feel a little bit sort of like they’re being monitored – and they shouldn’t, because the whole nature of the EPQ is independent.” (Ravi2)

- **SFC3 informants' views – on power**

It is interesting to note how SFC3's Principal described her centre's strong culture and ethos as both 'empowering' and 'successful' for all involved:

"And I think we are very fortunate to have people who are loyal to those values and ethos." (Leanne3)

Certainly, Naomi3 expressed appreciation of the benefits this approach had generated for her, and throughout the college:

"I mean, Leanne3 [*and*] Jenny3 [*have*] very little influence in that respect –in terms of you go to them and you tell them what you're planning to do and you're given the rein to do that." (Naomi3)

As had Josh1, Jenny3 made an interesting observation in relation to student 'power'. In her view, they held a certain level of 'power' and responsibility in the college – *in loco parentis* - that would not be theirs in a school setting:

"We expect the students to be the first point of dialogue that we would have, even about important or difficult information. We would start with the students first and then broaden the conversation out to parents afterwards." (Jenny3)

In addition, she drew attention to the way EPQ Supervisors were regularly encouraged to work with and support each other, and were given time in which to develop teaching materials and online resources for sharing with others. For example:

"When we do moderating, we work in pairs. And my colleague, Leanne3, across the way is a [*supervisor*] as well and we've often informally talked about the EPQ in a number of ways and shared ideas – and Tanisha3 has often created and put together ideas that other people have plugged into really nicely." (Jenny3)

- **Reflections on findings**

From the evidence presented, it would appear that the majority of informants from all three centres strongly concur that power, in varying measures, emanates from all types of enactment actor – as does the capacity to empower and be empowered. Moreover, all three Principals recognise the crucial importance of developing a culture of mutual trust throughout their institution if the varying occurrences of power/empowerment are to function harmoniously and productively to the good of all. For them, the concept of ‘distributed power’ (SFC2) both reflects and supports the conditions required for successful distributed leadership.

Of particular importance to staff and SLT members in SFC1 and SFC3 is how best to respond to the power and empowering potential of the student cohort over college/course viability, sustainability and continued success. For both centres, the outcomes from ‘student voice’ activities are highly valued in this respect, as is the importance of maintaining a climate of awareness and responsiveness to student needs (SFC1) and of consistently treating young people as responsible adults in their own right (SFC3). Interestingly, although the views of informants at SFC2 also reflect these priorities, focus is placed more on the notion of enabling self-empowerment through self-development for both students and staff (Vernon2), this being in keeping with the centre’s vision of improving teaching and learning through a ‘can do’ culture of innovation, creativity and exploration.

With regard to the latter observation, even in a climate of externally-imposed, increasingly severe financial constraints, not one of the colleges would be prepared to sacrifice staff and students’ freedom to innovate, carry out action research (SFC3) or experiment (SFC2) if it might improve teaching and learning quality – and sustain participant motivation. Interestingly, the level of appreciation expressed by staff members regarding the opportunities they are

given for experimentation appears particularly strong at SFC2, although this may be due to the interview sample.

- 5.2.4 Interacting with contextual dimensions: centre findings

- **SFC1 informants' views – on contextual dimensions**

For SFC1's Principal, one of the most important ways of managing any kind of problem, such as tension between SLT and other staff, misunderstandings or confusions arising within the centre, has been to focus on improving institution-wide communication systems:

“I would say that we try to engage people... As decisions get harder and the environment gets more hostile, so to speak, in terms of funding and opportunity, it's all the more important to help people understand some of the areas where decisions need to be taken and why certain decisions are made.” (Josh1)

To this end, SLT were now based in different parts of the college, following staff feedback that they viewed them as quite an isolated team – and that staff felt isolated from them. In addition, a current aim of the Principal was to build on the initiatives and interests of staff in the organisation, despite factors that might inevitably prevent this from happening:

“I think we're getting better at genuinely trying to listen, and benefit from the ideas and the leadership that staff offer.” (Josh1)

At the time, particular external contextual pressures related to the proposed new A level curriculum and reduction of study hours for students, which Josh1 perceived as likely to: “...water down the breadth and the richness of their studies”.

For Mary1, however, the curriculum model adopted by the centre in order to cope with the impact of reduced student hours had been deliberately planned to ensure it would not adversely affect the EPQ's viability:

“Now the model that we follow, because we feel the enrichment is important, is that we have a 3 – some people do 4 A levels – but a 3 A level model, largely, by the 2nd Year, and that they would then pick up additionality that enriches them.” (Mary1)

She was anticipating that the imminent move to linear A levels could also benefit the EPQ in terms of its timing within the college academic year. This, although manageable, was always rushed at the end of the summer term:

“At the moment, we're sort of finishing in early May, got study leave, loads of exams and then regrouping in mid-June. [We] do some weeks to July and then we start again in September; whereas with linear, the model will become a much longer outcome- and learning-balanced curriculum, if that makes sense, because you're being able to focus on learning and learning experience that little bit more...” (Mary1)

Mary1's wider involvement at SLT level in the development of the college as a 'learning community', and the associated investment in digital resources, had offered an excellent opportunity for making EPQ-related research facilities and materials more accessible and relevant. This had been possible because of her dual responsibilities for line-managing the EPQ and the college's Learning Resource Centre.

From comments made by Harriet1, it was evident that the external contextual pressures of Ofsted and the annual Subject Area Review (SAR) were both sources of anxiety to her in relation to managing the EPQ programme. The way the EPQ was run was: “...very much embedded into the SAR”, meaning this was a standard she would need to maintain. With regard to Ofsted:

“So we’ve been fed from, on the back of Ofsted coming very recently, that our vision is to improve particularly A2. We feel that perhaps students aren’t doing enough of what they should be doing, so we want them to be more independent learners and to do more outside of the classroom on their own.” (Harriet1)

Further concerns were voiced over competition with another local FE college and a politically-driven FE Area Review currently taking place:

“So I think that influences and obviously drives up the need to be outstanding and excellent.” (Harriet1)

Internally, ‘material contexts’ such as a recent restructuring of middle management due to financial pressures were perceived as likely to affect morale and workload in the long-run. Moreover, particular concerns that caused difficulty for Harriet1 in her new role related to high staff turnover – impacting on the annual recruitment and retention of EPQ Supervisors – and inadequate systems for monitoring poor attendance. Interestingly, however:

“...college-wide, there’s a gender issue – boys underachieving – but it doesn’t seem to be a big issue in the EPQ.” (Harriet1)

Significantly, with regard to the high value placed on enrichment programmes at SFC1, Harriet1 noted the effect of practicalities on good intentions:

“I think, in terms of enrichment, our timetable doesn’t allow a lot of flexibility. Like, our lunchtime runs from 12.00 to 12.45 – that’s 45 minutes, so that’s a bit of an inhibitor. Also, a lot of the students don’t want to stay behind after the school day – they’ve got [*to catch*] buses for transport, in that respect.” (Harriet1)

Nevertheless, she agreed that the college ran “massive amounts” of well-organised and well-promoted enrichment activities for students that attracted

high attendance. In terms of EPQ teaching and learning, in a centre where some of the student groups were subject-specific, she commented:

“I guess an inhibitor might be the facilities ... we only have a certain amount of rooms with computers ... For example, students who do science EPQs, you have to timetable them either for a lab or a computer room, you can't have both ... but then the whole point of the EPQ is for students to organise their time in a lab independently.”

(Harriet1)

EPQ Supervisors (Farida1) also raised concerns about the effects of limited finance and available time on ensuring consistent delivery of a good quality EPQ learning and enrichment experience. She commented on a recent extension of enrichment activity choices, made available to students as a result of the disappearance of AS level courses, which could be having an adverse effect on EPQ take-up. Even so, it might simultaneously ensure greater commitment from those who selected it:

“There are things that students can now do that are extra-curricular which don't carry any UCAS points or any qualifications but might be recreational ... Zumba or something like that. And that may have had some impact on EPQ because that would have been the thing that most people did [*previously*]. Which might be fine for them - but it also might mean that those who do decide to do EPQ really want to do it. So that would be a positive thing.” (Farida1)

Linus1, an EPQ Supervisor experienced in teaching at other local colleges, had noted the slightly lower levels of SFC1 student application (also commented on by the Principal) and wondered whether this might in part be to do with low parental expectations. In other more affluent locations, colleges tended to have formal, rigorous systems in place to pick up on student underachievement, because of parental pressure:

“*Elsewhere*], there are quite serious measures in place to make students aware that the sixth form is the stepping stone to real life. You don’t have that here, and I’ve heard students reflect on that. You can say it’s a more friendly environment here – less of an academic ‘machine’ – but obviously the downside of that is instilling that responsibility, or having those measures in place where there is some sort of comeuppance...” (Linus1)

He, too, noted the lack of time for enrichment, and highlighted a particular effect this had on EPQ enactment:

“Some people have found the Presentations difficult, going back to what I was saying earlier about the day being so short. You’ve only got half an hour (*sic*) lunch break and, in practice, getting the students to go through their presentations that they perhaps haven’t been able to do in lesson time... that sort of time constraint can be difficult.” (Linus1)

Finally, with regard to student perspectives, when asked about the challenges they had encountered during their EPQ studies, their main concerns tended to focus on how often their supervisors had changed (this may have been a particular problem for the student sample interviewed). At times, having a different supervisor had led to confusion about what they were expected to do. For some, problems related to distinctive aspects of the EPQ for which they had felt unprepared prior to starting the programme. For example: the amount of referencing (John1; Mark1); “too much freedom at times” (Mark1); “finding research that links with your projects” (Oliver), and “balancing the project with other subjects – time management” (Linda1).

- **SFC2 informants' views – on contextual dimensions**

For Steve2 and Vernon2, a major problem at the time of interview was how to cope with budget cuts, set to increase substantially in the next academic year, which could threaten the EPQ's sustainability. Rather than remove a qualification so evidently in harmony with their professional values, they had implemented creative timing and staffing strategies to reduce the financial strain:

“So the EPQ is an additional cost. I think we manage it extremely efficiently here because ... we have staff who are freed up in a few weeks' time, once we get to [*summer*] half term ... the A2s have all gone, so we can do the bulk of the EPQ in that period of time.”

(Vernon2)

Nevertheless, concerns still existed relating to staffing the programme, as not all teachers were keen to act as supervisors. Timetabling was also an issue, as was how to keep a realistic limit on the number of students pursuing an EPQ without unfairly restricting access to the course for some, or reducing the quality of the programme for all:

“How do you give them opportunities to present - to do that communication piece? We do that at the moment with a Presentation Evening but if you've got 1,000 youngsters, well, it boggles my mind...”

(Steve2)

Vernon2 was able to shed light on the impact that the 'situated context' of the centre's history had had regarding the EPQ at SFC2, not least because he was primarily responsible for convincing the college to introduce it. As previously explained by Steve2, the college had run a similar type of non-accredited programme for several years, but:

“Southampton University decided to lower their grade boundaries by a grade if you had an EPQ. Suddenly, it felt like this thing that we were doing out of the goodness of our heart – because these [*projects*] were being marked but they weren’t being marked in terms of the rigour that was applied by the Examination Boards, but we were still doing the marking – it just felt like it would be good to actually get some UCAS points for it, something tangible out of it...” (Vernon2)

Moreover, the fact that the EPQ would enable students to create artefacts or events *as well as* dissertations would provide an opportunity for opening up the experience to a wider range of abilities, in line with college’s egalitarian and “very open access” ethos. Significantly, Vernon2 commented on the benefits that the ‘old’ project model might bestow on the ‘new’ EPQ:

“Because we have that, in a sense, ‘race’ memory of what we used to do, we don’t want to sort of diminish that for the students who are doing it now. So we do have this quite nice [*Presentation*] event – I’m really, really impressed. It hasn’t got quite the prestige that our original event had, but I’m not sure the students would know any different.” (Vernon2)

For Ravi2, current concerns and constraints on his role as lead EPQ Coordinator also related primarily to finance, meaning:

“If you come up and say ‘I want to do this’, and I say ‘We haven’t got the resources for that, unfortunately’, I think that’s going to be more of a problem than it used to be.” (Ravi2)

Even so, although some of the “more adventurous things we used to build” may not happen as often, experimentation – creatively applied – would still hold sway:

“The experimentation is sometimes deemed as a good thing if it enables us to find ways of saving, cutting costs. So, for example, using lecture theatres instead of classrooms is one of those ways. If you can, for one lesson a week, have the entire cohort in a big lecture theatre, that’s just saving a little bit of time that could have been freeing up classrooms and things.” (Ravi2)

For Ravi2, maintaining timetabled lessons was essential, even under current financial constraints:

“For students and also the supervisors to take it seriously, I think it really should be timetabled.” (Ravi2)

An external factor currently concerning Ravi2 (and Desreen2) was competition between their centre and local schools, as the latter were increasingly being encouraged to maintain their own 6th forms:

“So, we have to have a competitive edge. I think having something which separates us from secondary schools is why students will still keep coming here, even if their schools are providing A levels. We’ve got, as I said, quite a lot of extra-curricular activities because of the size of this college. I imagine that enables us to cater for a wider variety of students’ needs and interests.” (Ravi2)

However, more positively, interaction with other ‘external contexts’ had included the ‘supportive’ and ‘responsive’ nature of parents in the locality (also noted by Desreen2), meaning that:

“We have an annual Presentation evening for the EPQ. And loads of parents come in to watch and participate.” (Ravi2)

Where he admitted there was a gap, however, was in proactively encouraging businesses to engage with the EPQ:

“Because the vast majority of students leave here and go to another county, often in another part of the country, to go to university, so it’s going to be a long time before any of them start doing paid employment – and there’s actually not much reason to believe they’ll be doing it in this county – so there’s less incentive to do it, I think. So I’m not aware of any significant business engagement.” (Ravi2)

However:

“I think that [*business engagement*] was one of the things that we identified the EPQ as potentially being able to develop ... And maybe that would appeal to a different type of student?” (Ravi2)

With regard to links between the college and universities, relationships were considerably stronger, enabling Ravi2 to develop EPQ-related opportunities linked to the annual University Recruitment event:

“Southampton is probably one of the biggest recruiters and they are very pro-EPQ – and that helps for me, it helps a lot. So a lot of the students here want to go to Southampton and Southampton are very vocal and open about [*the EPQ*].” (Ravi2)

Internally, ‘material contexts’ were particularly challenging for Ravi2, such as timetabling and staffing in relation to student availability:

“Fitting the EPQ around pre-existing timetables for the students – it might not sit very neatly with the free slots the staff have; especially if they’re doing 4 A levels, it’s very difficult to find.” (Ravi2)

Similarly, there was a pressing need to timetable all lessons in rooms with sufficient computers as 90% of EPQ-related resources would shortly be going online. Added to which, although Ravi2 had always run regular training sessions for supervisors, times allocated to Faculties 1 and 2 staff for this

purpose did not align – meaning there was no time when all supervisors could attend. Consequently, Ravi2 often had to run two separate sessions.

An interesting point raised by Desreen2 was that the centre maintained a thriving system for organising business placements, careers advice and volunteering which could be used to build links for the EPQ but, as yet, had not been approached to do so. However, on a positive note, she pointed out the increasing use being made of the EPQ as a means of studying subjects no longer offered by the college:

“I’ve got a student who is doing an archaeological EPQ. I’m guessing he may have been really keen to do A level Archaeology and he’s not able to ... Well, he’s thrown himself right into it. So he’s able to satisfy that curiosity and interest where something on the curriculum is missing...The EPQ is really plugging those gaps.” (Desreen2)

Enid2, the centre’s LRC manager, voiced concerns about the effect of limited communication between her staff and EPQ staff/students, even though they traditionally made a substantial contribution to the programme. For example, she could have benefitted from receiving a list of EPQ Supervisors in order to contact them and jointly plan her input into their sessions because:

“...it can be frustrating when we feel we’re presented with a topic and we’ve got nothing – I don’t know what to offer.” (Enid2)

As a potentially vital component of the internal support system for EPQ students, Enid also felt more could be done to continuously promote the LRC, especially as:

“The fact that in June [*after exam revision has finished*] the EPQ is launched is quite good for us because we’re all quite enthusiastic about the EPQ because it’s proper research and it’s something to get your teeth into.” (Enid2)

From the perspective of EPQ students at SFC2, when asked about the challenges encountered during their EPQ programme, an interesting point was raised by several informants. They understood that the EPQ was about independent learning and that limited time might be available from their supervisor, given they normally would be dealing with around twenty students per class, so they had learnt to depend on each other, where necessary:

“...like the literature review, I really struggled to know what that was to start with, and so I think we helped each other to know *what* we’re doing, rather than with the actual content.” (Sam2)

As with students at SFC1, the greatest levels of challenge related, not unsurprisingly, to previously unfamiliar aspects such as the resource review (Anna2), time management (James2; Sam2), and managing the sheer volume of tasks:

“To start with, I felt as if I was overwhelmed with things to do, as I was told everything that was expected by the end but the process wasn’t properly explained.” (Tim2)

- **SFC3 informants’ views – on contextual dimensions**

For SFC3’s Principal, the strategic move made by her centre to encourage a far wider range of EPQ outcomes had proved highly successful for meeting the needs of a largely academic cohort of students. Perhaps in part, Leanne3’s own professional background in teaching vocational qualifications such as GNVQ, AVCE and CPVE may have influenced her opinion:

“That was really a great move, I think, because it does give our students ... the opportunity to do creative, practical, vocational projects as well as exercise and implement their academic skills.” (Leanne3)

However, interaction with contextual dimensions can clearly be a two-way process and in this case, as she pointed out, the highly academic and focused nature of the centre had also yielded benefits for the EPQ:

“It’s true that people [*supervisors*] go across their particular remits but there’s a very large degree of specialisation. Whether it’s guidance or the subject level, every area I would say is supported by specialists.”
(Leanne3)

Moreover, SFC3 had always run a significant ‘extended curriculum’ in which the EPQ had found a secure position from the outset, alongside a menu of choices such as Science in Society, World Development and Critical Thinking:

“We’ve always believed very strongly in both enrichment and extension and all of our students have always had to do it. Of course, they love to do it!” (Leanne3)

Interestingly, she observed that the college’s ethos and values had changed little over time, despite many educational reforms taking place nationally and locally:

“I think that’s probably the strength of the college in that it’s always been about people and relationships and learning, and whilst ... sometimes you feel you’re frantically changing to try and accommodate the external influences, I think those things have stayed true.”
(Leanne3)

For her, it would be essential not to compromise these values by introducing any activity that might dilute, rather than strengthen, the culture.

Nevertheless, the need to respond to future technological changes – imposed from outside rather than within – was unavoidable:

“The meeting individual needs and really responding to them, engaging them , the things that make that a bit different are the 21st century

requirements – the use of technology; making sure that everybody is equipped to be a 21st century citizen ... without forgetting that the fundamentals for teaching and learning probably haven't changed hugely." (Leanne3)

Because, at 1,100 students, SFC3 had by far the largest EPQ cohort of all the centres, internal 'material contexts' such as timetabling, staffing, classroom availability and student group sizes all presented exceptional problems:

"Our timetabling and staffing has become more constrained of late since our curriculum has narrowed, and there's no doubt that, as the funding pressures have increased, the flexibility of staffing has decreased. And therefore we're reliant on very brilliant people who look at the staffing, try and make it all balance and have to work harder every year to do that." (Leanne3)

Even so, in Leanne3's opinion, the issue was no worse for the EPQ than for any other subject. The key factor was the commitment of staff and their willingness to adapt and support each other. With regard to student retention in the EPQ, every student signed a Learning Agreement when they joined the college and, in this, the EPQ was on a par with their entire study programme and "not a sort of opt-out option" (Jenny3).

For Jenny3, recruitment of suitable EPQ Supervisors – of which a large number were required – meant interacting with the 'professional cultures' of the centre's staff in order to find those who might have the necessary expertise – which was not always possible:

"Who have the right kind of mind-set, skills and qualities that enable them to be really effective? I'm not wedded to the notion that supervisors indisputably have to be teachers necessarily." (Jenny3)

Consequently, from time to time, the centre had successfully recruited external partners to act as supervisors, employing them as part-time tutors rather than depending on their goodwill.

As with the other centres, a key 'external context' concern for SFC3 was the impact of curriculum reform. This had proved a "massive challenge" for all departments but, curiously, Jenny3 observed that it was having a really positive effect on the EPQ, in that it had encouraged the college to bring it 'centre-stage', especially when recruiting at local schools:

"...because our students are now going for 3 standard linear A levels rather than 4 A/S and 3 A2s. That means we're talking about the EPQ effectively becoming their 4th and using it as an opportunity to really challenge themselves, extend themselves or to recreate something they've really enjoyed but perhaps they've left behind in terms of their A level choices because they've narrowed to 3." (Jenny3)

Internally, although flat-rate funding was in place until 2020 due to national cutbacks for post-16 students, this was seen as less of a problem for the EPQ:

"...one of the things about the EPQ that's really fabulous is that we can sort of do it on a shoestring, really, in terms of delivery because there is no content to deliver... because it is all skills and we're working with students in a very different way." (Jenny3)

What might be termed 'economic' styles of teaching and learning, already familiar within SFC3's EPQ enactment, were now beginning to cross over into the wider college curriculum, such as encouraging staff to make creative use of differentiation and "setting student groups up in different ways":

"We're trying to set opportunities up for meeting student needs much more appropriately via verbal feedback and small group work – to kind of meet them at the point of challenge, I suppose." (Jenny3)

Similarly, all subjects were now using 'out-of-class' resources stored on a 24/7 digital platform, SharePoint, so students could access materials without having to ask their teacher – the aim being to promote students' self-reliance:

“And then, in a sense, the teacher is there for some of the higher order work rather than just the fact and detail checking.” (Jenny3)

For Naomi3, at the time of fieldwork, the main contextual challenge for the whole centre was undoubtedly money. Financial constraints were beginning to affect teaching and learning and, consequently, workload:

“And because of [*reduced*] funding we are growing, everything's getting bigger. All our set sizes are increased in size, the number of sets we have is increased...” (Naomi3)

The impact of curriculum reform was seen as less of a challenge, in that the move to linear A levels might even provide opportunities to introduce more flexibility and freedom to experiment in the classroom (although Guy3 was somewhat sceptical about this). Moreover, it had enabled the centre's move to a compulsory EPQ alongside 3 A levels which opened up this valuable opportunity to the entire cohort, rather than just high-ability 'self-selectors':

“We felt in the end that actually your middle and your low end need it more; even if it doesn't show up in their grade, they actually need to do it [*the EPQ*].” (Naomi3)

Several other aspects of the EPQ raised concerns – firstly, the marking which was “incredibly hard” in Naomi3's opinion, and added to supervisors' feelings of insecurity: “...because the mark scheme's suitably vague”. Secondly, trying to convince all students of the EPQ's value as a learning programme, especially when their experience at HE Open Days had shown some universities to be less than enthusiastic about the qualification:

“Even though we’re in an ethos of breadth, trying to convince a student who’s been brought up in an educational system where you have to take an exam every couple of years... trying to convince them that anything else is worth it is quite hard.” (Naomi3)

Thirdly, having time to moderate, especially when only a sample of 20 projects would be required by Ofqual for external moderation – out of a total of 1,000+:

“That’s not even statistically valid, and yet we are judged on those 20!” (Naomi3)

Lastly, because the programme was compulsory:

“It’s the trying to work out how much you should chase a student to do an independent project. So it’s that little body of... we will have about 4%-5% who get a U grade and it’s how far you let them just do that.” (Naomi3)

Like Naomi3, supervisors Tanisha3 and Guy3 were also strongly aware of the pressures on the college regarding finances and changing A level specifications, with longer hours to be worked but no pay increase:

“However, the people here who run the funding side are extraordinarily good at planning ahead and have always kept us on a good financial footing. So we’re able to do some expansion.” (Guy3)

With regard to the EPQ programme, Tanisha commented on the challenge of sustaining some students’ commitment and motivation over a longer period of time (an academic year) than was normally the case for other enrichment programmes, especially when exam deadlines drew near:

“If you come to SFC3, you do a compulsory enrichment programme, and an EPQ. And anything that they haven’t chosen that they feel

impinges on their time to actually get on with their studies, they start to kick up about.” (Tanisha3)

However, Naomi3’s consistent support and accessibility had helped her deal with these matters. With regard to EPQ Supervisor recruitment, Tanisha3 also observed:

“Nobody’s ever rejected – if they’re interested in doing it, they’re never rejected. It’s always open, but it’s naturally come from part-timers and their hours – because the EPQ lessons are very easy to map around for part-time timetables.” (Tanisha3)

Lois3, SFC3’s librarian, drew attention to a set of particularly challenging ‘material’ contextual issues for her. She expressed considerable enthusiasm for contributing to the EPQ programme and saw many opportunities for her participation. However, she had felt somewhat marginalised both by staff and students, partly because of her location and the need for substantial investment:

“I don’t think the library’s reaching all of the students and that is a general ‘size of the college’ aspect ... and it’s student attitude ... If I do speak to individuals they say, ‘Oh, I hadn’t even thought of the library’ or ‘Oh, well my project’s about so and so and it’s so specialist that you wouldn’t possibly have anything’.” (Lois3)

Finally, as with students interviewed at SFC1 and SFC2, the student sample at SFC3 was keen to share their experiences of participating in an EPQ. For those engaged in producing artefacts (a considerable percentage of the cohort), an important issue was to do with having to attend weekly supervised lessons in ordinary classrooms with no access to the facilities or resources they required:

“It sort of meant that you *had* to be there and it wasn’t always a great use of your time when you could have been somewhere else, like doing

researching or doing it [*the artefact*]. I feel like sometimes, the lessons maybe they shouldn't be every week because it was a bit... if you're doing just an artefact you know you don't actually need to be there. You're just sat in the room for an hour..." (Kitty3)

Similarly, when students were relying on accessing online resources for continuing their research, the state of the computers had led to considerable frustration for several:

"The computers were quite old and very slow and kept crashing. So I didn't want to like have to keep redoing stuff and losing it ... So I much preferred doing it at home." (Lorna3)

A third issue was to do with awareness and use of the online SharePoint resources for the EPQ. Considerable staff time had been spent on developing a sophisticated, EPQ-dedicated system, easily accessible to both students and supervisors. However, as one student observed, with agreement from others in the group:

"I find that kind of wanting, actually; I was having a look only yesterday and I realised, 'Oh, I haven't done all of these forms that they've put on there!' But I might have done my own versions of them or something similar. So, I think it's good for them to be there but I wasn't actually aware that they *were* there." (Lorna3)

As with students from both SFC1 and SFC2, the majority of EPQ-specific challenges encountered related to previously-unknown aspects of the process itself. For example: coping with the volume of research required (Lorna3); lack of access to a specialist regarding one's chosen project topic (Rachel3). Time management yet again proved to be a problem for the majority: "...as I overestimated how long things would take" (Kitty3). Also:

“I found the concept of long-term planning difficult as there are often external factors that will affect the order in which you achieve each part. Therefore, you must adapt as you go along.” (Stuart3)

- **Reflections on findings**

When contemplating the findings above, it is striking to note that data clearly indicates aspects of both successful *and* less successful EPQ enactment to be present in all three of the case study centres. These appear to depend primarily on Ball *et al*'s dynamics and interrelationships of contextual dimensions and the ways in which enactment actors have responded to them, as discussed in their study of policy enactment (2012). For example, the approach taken to students' EPQ presentations in each centre is very different: SFC1 runs them during lessons or lunchtimes to peer groups; SFC2 organises a formal evening event for parents; and SFC3 runs a series of half-day Marketplace events in which students are given display space and a limited time to present their work to audience members who 'visit' and feed back to them individually. Of the three presentation types, SFC1's version appears less successful than the other two (Linus1) but how practical would it be for them to adopt a different approach? From informants' views, it is clear that parental support at SFC2 is far stronger than at SFC1 and that their students are prepared to attend out-of-hours events – which SFC1 students are reluctant or unable to do. As for the Marketplace events at SFC3, these depend entirely on excellent management skills and expertise from the lead EPQ Coordinator, and support from a Principal and Vice Principal actively engaged in the programme. In contrast, the lead EPQ Coordinator at SFC1 is new to the job, still acting very much as a 'receiver', and her Principal, though clearly an enthusiastic 'entrepreneur' with regard to the EPQ, freely admits he has no direct experience of the programme. Moreover, SFC3's lead Coordinator not only

works well in several 'actor' roles, especially as 'entrepreneur', 'transactor' and huge 'enthusiast' for the EPQ, but also holds a powerful senior management position in a college where distributed leadership principles are fully integrated, unlike at SFC1 where this approach is still being embedded.

Two further matters of significance have emerged as a result of analysing data from the case study centres. Firstly, the process has highlighted and confirmed a number of ways in which EPQ students must engage with contextual circumstances, in similar fashion to other EPQ actors, including their supervisors. For example, they must interact with material contexts such as the poor quality of computers which reduced motivation (SFC3), lack of physical access to supervisors (SFC1/2), project topic 'specialists' and/or specialist resources at times that best suit the student (SFC2/3) and lack of signposting regarding online resources available for students (SFC3). Of particular interest is how students report feeling considerable levels of challenge with regard to the kind of 'teaching and learning contexts' they are exposed to for the first time through the EPQ; for example: tackling long-term planning; time management; managing the sheer volume of tasks.

Secondly, the investigation has strengthened the researcher's suspicions that, although business/community engagement in the EPQ does occur, as students often make their own independent approaches to external partners regarding topic ideas related to work, career plans or enterprise, this appears to be rarely encouraged or actively supported in any of the participating centres (see Ravi2's comments). Nor do the centres often take advantage of the opportunities for developing further business or community engagement available to them *through* the EPQ. Despite Tomlinson's original vision for the EPQ as a contributor to both academic and vocational/technical learning, the view that it is predominantly a route to HE success clearly seems to prevail.

5.4 Conclusion

In presenting the case study findings in Chapters 4 and 5, I have endeavoured to provide an insight into the unique mix of material conditions and varying resources within which the EPQ is enacted at each of the three centres contributing to this study (Ball *et al*, 2012: 21), utilising the views and opinions of informants who are themselves 'actors' engaged in the EPQ enactment process. In so doing, my aim has been to seek answers to Research Question 1 (RQ1) in particular, and the four sub-questions associated with it.

It is important to reiterate that 'successful' EPQ enactment in the context of this study does not relate to the number of A* and A grades achieved annually by student cohorts, or to the size of the cohort recruited in a self-selection system, even though these might both be considered as indicators of success. Nor does it necessarily follow that reputedly 'successful' institutions, such as the three involved in this study, will inevitably be as successful in the enactment of their EPQ programme. As Ball *et al* have shown in their study of policy enactment (2012), there can be no fixed formula for success, given the unique range of variables involved in any enactment setting with which the actors must interact.

In my final Chapter, I intend to present a summary of thesis content, to discuss what I consider to be the main outcomes from this study in terms of its originality and the contribution it has made to the field, to identify some implications arising from findings and to reflect on the ways in which my professional development as a researcher and my understanding of education have been influenced during the study. Finally, I propose to deliberate upon the potential benefits of this research for practitioners and other stakeholders, together with the possibilities it may hold for future research studies.

Chapter 6: Conclusion

6.1 Introduction

This final chapter provides a concise summary and reflection on the main content of my thesis thus far. Specifically, my overarching research aims and principal research questions will be re-examined, along with the methodology adopted and key findings emerging from both the case study fieldwork and the literature review. Also to be considered are the implications arising from these findings, together with contributions made to knowledge in the field, the potential benefits for stakeholders (including the researcher) and opportunities for future research.

As explained in Chapter 1, the thesis set out to examine post-16 learning programme enactment through study of the Extended Project Qualification (EPQ), a distinctive form of level 3 qualification offering students substantial amounts of freedom when choosing their project topic and the manner of its presentation. With no prescribed syllabus, centres are at liberty to vary the programme's content and style of delivery to best fit their circumstances and the needs of learners, within the parameters of Ofqual criteria and awarding body specifications. As a result, in an age when many other courses have become increasingly prescriptive and content-driven, and when coursework components have all but disappeared from A levels, the EPQ is distinctive in focusing on *process* rather than content. Moreover, compared with most other post-16 learning programmes it offers far greater opportunities for both learners and providers to practise autonomy, flexibility, creativity and innovation in its enactment.

The main aim of the study was to determine some of the key influential factors (both internal and external to an institution) helping to generate successful

post-16 learning programme enactment, expressly with regard to management and delivery of the EPQ. To this end, evidence was gathered from three case study centres, all sixth form colleges experienced in running the EPQ, using a range of primarily qualitative methods including one-to-one and group interviews, observations and scrutiny of relevant documentation. My research objectives were to observe and compare, firstly, how the EPQ was being enacted within and across institutions, and secondly, who and what may be influencing its enactment in order to find evidence that could help answer my three main research questions, of which RQ1 addresses the main issue and is supported by four sub-questions:

RQ1: *Why do some post-16 institutions appear to be more successful than others in delivering and sustaining the EPQ as part of their post-16 curriculum provision?*

- a) *How do different centres – and the various communities associated with them – ‘interpret’ and ‘translate’ the EPQ and how does this impact on integration of the qualification into their post-16 curriculum offer?*
- b) *How might a centre’s aims and objectives for introducing the EPQ into its existing post-16 curriculum ultimately affect its successful enactment?*
- c) *In what ways might the underlying preconceived notions of individuals or groups either be contributing to the successful enactment of the EPQ or influencing a centre’s reluctance to introduce the EPQ - or be contributing to its eventual withdrawal?*
- d) *How does the centre’s existing curriculum practice and provision, together with its institutional policies, values and vision for teaching and learning, influence its interpretation and translation of the EPQ – and vice versa?*

RQ2: *What was the EPQ's intended purpose and how, if at all, has this altered over time?*

RQ3: *How has planned change led to unplanned change over time?*

The question posed in RQ2 was primarily addressed through the literature review which explored the two core components of this study. Firstly, it aimed to shed light on the EPQ's origins and purpose and provide in-depth understanding as to how it had evolved over time in face of an ever-changing and, at times, potentially hostile political climate. Concerning the EPQ's emergence as part of New Labour's Tomlinson Report on 14-19 qualifications (DfES, 2004a), through comparative analysis it was found that Tory policy developments relating to post-16 educational reform in the final years of the 20th century, and particularly the Dearing Review (1996), may well have profoundly influenced or, at the very least, helped paved the way for the recommendations of Tomlinson's Working Group, which included the 'birth' of the EPQ. Further comparisons made between the EPQ and other project-focused, post-16 programmes, including BTECs and the IB (a major inspiration for Tomlinson), helped delineate the distinct characteristics of the new qualification. In addition, through scrutiny of EPQ specifications and other resources published by awarding bodies, some of the externally-'encoded' elements coming into an institution as part of the Development stage of enactment were identified. Finally, the EPQ's existence in a time of severe economic and financial austerity, post-2010, was considered. Under the new Coalition and the later Tory governments, despite its early association with the ill-fated 14-19 Diplomas, the EPQ survived and flourished. It alone continued to offer unmatched degrees of autonomy and flexibility in participants' learning, at a time when policy dictated that coursework would soon be disappearing from all other A level courses.

The second core component to be examined in depth in the literature review was the policy enactment process propounded by Ball *et al* (2012) which later informed development of a conceptual framework for my research. In addition to locating the background of enactment, two fundamental and interrelated elements of enactment were also investigated and found to be ideally suited, with some adaptation, to this study of the EPQ. These were, firstly, Ball *et al*'s concept of the 'interrelationships between contextual dimensions and enactment' and secondly, their flexible typology of eight categories of enactment 'actor'. Both these elements provided logical and inspirational foundations for my investigations into the activities and perspectives of the various 'actors' engaged in EPQ enactment, internally and externally to the three case study centres. For clarity, the sample of research informants drawn from each centre and beyond were, in turn, loosely grouped into four sets: EPQ 'contributors' (EPQ Supervisors/librarians), 'participants' (students), 'stakeholders' (SLT/ employers/wider community) and 'shapers' (awarding bodies/HE representatives/policymakers). Rich qualitative data was collected from all groups, mainly through semi-structured interviews, and analysed using initial and focused coding methods associated with the constructivist model of grounded theory (CGT), as propounded by Charmaz. Through the constant defining and redefining of data and codes, an analytical framework was constructed comprising the sixteen key topics and four conceptual themes most commonly emerging from informants' views and opinions, and thus representing the main types of action/interaction in which they were engaged as part of the Interpretation/Translation stages of enactment.

6.2 Research outcomes

- 6.2.1 Contribution made to the field

There are a number of ways in which this study could be said to have made an original contribution to knowledge in the field of educational research, one in particular being the innovative methodological design adopted for the fieldwork and subsequent data analysis. By using an adaptation of the policy enactment model developed by Ball *et al* (2012) in tandem with a strategic approach inspired by CGT principles and methods, a coherent means of identifying some of the key factors determining successful EPQ learning programme enactment has been developed – grounded in the perspectives and experiences of the research informants themselves, who thus became ‘collaborative partners’ with the researcher during my exploration of the phenomenon of EPQ enactment (Johnson & Rowlands, 2012). This structural approach to the study of a post-16 learning programme has potential for application in other post-16 settings and curriculum contexts, as will be further considered in Section 6.3.

Since its emergence, it is likely that Ball *et al*’s concept of the enactment process, which itself tended to reflect the earlier concept of ‘mediations’ described by Broadfoot & Pollard (2000), may well have been applied by researchers to topics other than policy enactment. Nevertheless, it is reasonable to suggest that its use in the context of this particular study is unique, given that it has not been possible to find evidence of it having been applied previously to an in-depth study of the EPQ, nor to an *institution-wide* examination of the management and delivery of any other post-16 qualification. Moreover, the version of the enactment process propounded for the purposes of this research also contributes new knowledge. Firstly, by incorporating Bell & Stevenson’s ‘Operational practices and procedures’ element (2015) into an otherwise ‘pure’ expression of Ball *et al*’s 3-element

structure, the process has been extended to cater more effectively for the characteristics of learning programmes such as the EPQ. Secondly, by successfully applying the adapted enactment structure as the conceptual framework which underpins my research purpose and content, this study has proved that centres 'do' the EPQ as a process of enactment: '...involving creative processes of interpretation ... and translation...' (Ball *et al*, 2012: 3). In addition, it has become apparent that policy enactment and learning programme enactment are closely interrelated and interdependent, often resulting in both planned and unplanned change taking place over time (RQ3).

As discussed in Chapter 1, it is through the functioning of enactment 'actors' that the 'meaning-making' elements of the enactment process – interpretation and translation – actually take place. Therefore, by applying Ball *et al*'s flexible typology of eight 'actor' roles to the various participants, contributors and stakeholders involved in EPQ enactment, new knowledge has been gained with regard to their roles and interrelationships, as well as what and how they contribute to the enactment process. Similarly, in order to make better sense of the diverse range of internal and external contextual factors both influencing and being drawn upon by EPQ actors as part of the enactment process, a logical framework founded on Ball *et al*'s notion of four 'contextual dimensions' – situated, professional, material and external – has been adopted. Again, this concept has been investigated as to its suitability in terms of EPQ enactment and also extended to include a fifth category which can take account of staff and student interactions with, and perceptions of, the impact and influence of 'teaching and learning approaches' on the EPQ.

In terms of new knowledge gained, I would suggest that the overarching concept of contextual dimensions has been shown to apply equally well to learning programme enactment as to policy enactment. Moreover, in helping to fulfil the main aim of this research, abundant qualitative evidence has

emerged to testify that it is not so much *what* contextual circumstances exist in a setting that really matters, however favourable or otherwise they might appear to be in themselves, but rather *how* they are perceived and interacted with by the centre, its communities and its individual members – including its students, who inevitably play a more significant role in learning programme enactment than in policy enactment. *How* the various actors decide to interrelate with and utilise contextual challenges, limitations and opportunities, as part of interpreting and translating the EPQ, would appear to be the most crucial factor in generating and sustaining its successful enactment. Further, this finding could be said to be the study's emergent theory, in keeping with the CGT nature of the research. Nevertheless, not all contextual aspects may be treated as effectively as others; for example, in all three of the case study centres, there were notable instances of unrecognised or undervalued resources and opportunities that could have greatly enhanced the quality of overall EPQ provision and supported the needs of both supervisors and students.

With regard to the contribution made by this study to what is already known and understood about the Extended Project Qualification and to post-16 education in general, it seems appropriate to highlight three further aspects. Firstly, as described in Section 6.1, a substantial review of primary and secondary data, including relevant literature, governmental policy documentation and statistical data, national qualification specifications, evaluation reports and awarding body materials relating to the EPQ, was conducted and the results presented in Chapter 2. The purpose was threefold:

- To provide an historical insight into the national educational and policy context surrounding the EPQ's emergence (1990-2005)
- To confirm the qualification's intended purpose and consider possible factors affecting its development and status since its inception (2006-2018)

- To evidence how the EPQ has become an increasingly influential feature in post-16 education and qualification reform since 2010.

In order to 'locate' the EPQ and provide a rationale for its inception and continued growth, an original, in-depth comparative study was made between the Dearing Review (1996) and the Tomlinson Report (2004), the focus of both being post-compulsory curriculum and qualifications reform but each reflecting the perspectives and priorities of different political masters. In this way, it is intended to have provided a rich source of information regarding the history and evolution of the EPQ, situated within the underlying political contexts and educational agendas of the past twenty-eight years, which is not readily available elsewhere.

Secondly, through conducting an in-depth, multiple case study of three different yet similar sixth form colleges with considerable experience and proven expertise in delivering the EPQ, there now exists a body of knowledge available to both educational researchers and practitioners that represents a situated, comparative study of 'EPQ enactment' grounded in the perspectives of those most closely involved in the process, be they EPQ practitioners, contributors or stakeholders. Although it is recognised that the relatively small scale of the research sample may restrict generalizability, in terms of *analytic* generalization (Yin, 2018), the findings nevertheless offer extensive opportunities for casting empirical light on theoretical concepts and lessons learned. This in turn can assist the identification of new research possibilities and inform EPQ enactment practice in other contexts and settings.

Finally, drawing on evidence supplied by informants during fieldwork interviews and observations, two particular contextual aspects have been identified as capable of significantly influencing the direction taken by EPQ enactment actors. Moreover, through interacting with the programme, the nature and purpose of each is in turn open to the influence of the EPQ. These

two aspects, 'Leaders and leadership' and 'Power and empowerment' (see Sections 2.3.3 and 5.2.2), are interrelated and interdependent in many ways and linked inextricably to the culture and ethos of the respective centre. Concerning the former aspect, for successful EPQ enactment to take place, findings suggest that a culture of distributed leadership is desirable, supported by leaders who are intent on cultivating a 'can do', learning community and communicate a well-defined sense of purpose for the EPQ. Where the latter is concerned, evidence suggests that 'power', including the capacity to empower and be empowered, emanates from all types of EPQ actor and is dependent on a culture of mutual trust and the notion of 'distributed power'.

- 6.2.2 Implications of findings

Implications drawn from research findings presented in this thesis relate primarily to the main aim of the study – to determine factors generating successful EPQ enactment. Clearly, such factors may also be capable of inhibiting the chances of successful enactment, as illustrated by some of the examples discussed below. Significantly, the matters addressed in this Section tend to focus around seven key aspects, the first five of which clearly align with the five key 'EPQ centre' characteristics or recommendations initially identified during the pilot case study (see Section 3.5.3). These characteristics fundamentally reshaped my thinking regarding development of the main study's overall research aims, questions and design; the evidence subsequently gathered during the main study has since confirmed their importance. The remaining two aspects have emerged as additional characteristics or recommendations also deemed essential for consideration by all EPQ centres.

1. There needs to be a clear rationale and sense of purpose about the EPQ, clearly communicated both at local and national levels

Clarity of purpose regarding the EPQ was demonstrated at all three centres with the majority of informants communicating the same 'message' about it to the researcher, albeit in varying measures according to the priorities of each centre. All centres agreed that the EPQ's focus on developing independent learning was the main reason for its inclusion in their curriculum/enrichment offer, together with its capacity to extend students' learning and skills proficiency. Moreover, it provided an outlet for pursuing personal interests alongside other subject studies, thereby helping to improve student motivation and satisfaction. It also provided a valuable opportunity for students (and staff) to 'discover oneself', and could help improve one's chances of attaining a university place. In the Opinion Finder results, both staff and students ranked the programme most highly for the opportunities it could provide for building personalised, student-centred learning experiences, developing specific skills for project management and research, and for enabling students to practise higher level/critical thinking skills. Further, senior managers highlighted the essential importance of emphasising that assessment of the EPQ focused on process rather than outcome.

2. The lead EPQ Coordinator requires a robust vision regarding the programme, and resilient leadership qualities

Building on the previous point, the majority of interview informants, including Principals, students and supervisors, indicated strong dependence on their centre's lead EPQ Coordinator for setting a precedent in communicating their personal understanding of the EPQ across multiple contexts and with a broad range of different 'actors'. The key purpose of this ongoing intervention would be to develop and sustain an institution-wide, shared vision for the programme. Lead EPQ Coordinators clearly recognised their responsibility in this respect, adding that they also needed to be sensitive to the expectations

of others and always to be 'realistic, honest and upfront' in the way they portrayed the programme.

From data gathered, it became apparent that the lead EPQ Coordinator's role carries a considerable workload, causing particular pressure on those tasked with managing their EPQ responsibilities alongside other subject management requirements, for example. In addition to marking, standardisation and moderation – all of which were exceptionally challenging when dealing with large EPQ cohorts – lead EPQ Coordinators were constantly engaged in four main occupations: providing training and support; preparing resources and lesson plans for supervisors; monitoring students' progress (and that of staff); and finally, liaising with others, both internally (including SLT, governors and Department Heads) and externally (especially HE and exam boards).

3. EPQ Supervisors need to be well trained, supported and committed

For many informants, especially SLT members and supervisors themselves, assuming the additional role of an EPQ Supervisor or mentor was perceived as largely positive, in that it offered considerable benefits for both the individual and the teaching workforce as a whole. For example, it enabled staff to escape from the 'straitjacket of the syllabus', encouraging them to think creatively, to experiment, to take pride in student achievements and to become learners in their own right, thereby reinforcing a centre's 'learning community' ethos. Nevertheless, in order to sustain their commitment and motivation, supervisory teams needed to feel appreciated and should be dealt with in a sensitive, non-threatening manner by the lead EPQ Coordinator.

From informants' comments, it was evident that the importance of providing supervisors with regular training and opportunities for reflective sharing of practice and ideas with colleagues – including the lead EPQ Coordinator – could not be underestimated, despite the strategic challenges inherent in regularly bringing the team together. In this respect, it should be noted that

successful interpretation (or meaning-making) and translation (putting into practice what has been interpreted) both greatly depend on there being formal and informal opportunities for personal reflection and focused discussion to encourage ownership of ideas and creative use of available resources. Moreover, early training of new supervisors was essential for helping them understand the shared EPQ 'vision' and overcoming ethical and practical dilemmas encountered. For example, given the very essence of the EPQ was to do with independent and student-led learning, some supervisors struggled with when and how to intervene, in keeping with EPQ specifications, and at the same time how to fulfil one's role as a teacher in terms of helping each student achieve their full potential.

4. Centres need to build opportunities for students to apply knowledge gained in the course of their EPQ programme, including interaction with employers and the wider community

Although a number of the EPQ student informants involved in this study had independently made approaches to external partners, mostly for the purposes of eliciting advice on their proposed project or in some cases to arrange a charitable enterprise as their project outcome, the lack of 'contributor' expertise or a proactive approach to building employer/wider community engagement into the case study centres' EPQ programmes was striking. This would appear to be very much of a missed opportunity, especially in those centres striving to raise employability skills and career awareness, and those where links with employers already existed and had the potential for being further developed strategically as mutually beneficial partnerships through engagement with the EPQ. Supervisors with previous industrial/professional experience in sectors other than teaching were equipped with knowledge and skills to support their students; however, during observed sessions, it became

clear that supervisors whose career pathway had been solely in education were often at a disadvantage and that, consequently, so were their students.

The fact that the Opinion Finder results identified the EPQ as being less useful for engaging with business, together with the low ratings given for its usefulness in terms of promoting active citizenship and local community involvement, suggests that much more needs to be done to raise the profile of the programme in this respect, both internally and externally. Internally, basic training for supervisors on how to approach and work effectively with employers and the wider community would enable them to better support their students; similarly, developing an online resource base of local employers/external contacts already known to the centre and examples of past EPQ projects involving external partners, could be a valuable exercise. Externally, sources such as the exam boards and national policy makers both have a part to play in promoting and developing this aspect of the qualification and in raising awareness of the EPQ and its value well beyond the HE sector.

5. The EPQ learning programme should fully complement, and be embedded within the curriculum

For centre-based policy makers and SLT members, the importance of making the EPQ 'work' for one's centre would seem to progress naturally from the points raised earlier (1 and 2) regarding clarity of purpose and building an institution-wide, shared vision for the qualification. For the three case study centres, the EPQ was valued for two main reasons: firstly, it was seen as a cost-effective means of continuing to enable students to study four or more subjects in a time of considerable financial constraints for the FE sector; secondly, it was interpreted as being closely in tune with each centre's culture and ethos and was therefore able to act as both a model and trailblazer for its communities, and to provide a curriculum/enrichment-based situation in which staff and students could put policy into practice.

What informants reported about the underlying characteristics permeating their centres' culture and ethos proved to be remarkably similar to each other and to the aims of the EPQ. Key features can be summarised thus:

- an ethos committed to the paramount importance of learning, the maintenance of a learning community and building learning power;
- a highly student-focused, supportive culture, based on mutual trust, respect and accountability, and where high expectations prevail.

6. How senior management perceive themselves as interacting with the programme is crucial to its long-term survival

Although only one of the Principals and two SLT members were actively involved as EPQ Supervisors, evidence from the study has shown how important the strong support of senior management is, whether actively or passively engaged, for increasing the positive reputation and status of the EPQ and potentially for ensuring its long-term survival in precarious times. In addition, it would appear that leadership style, which clearly has an influence on interactions and interrelationships, is also an important factor. The observations of all three Principals indicated that the concept of 'distributed power', essentially founded on an institutional culture of mutual trust, both reflects and supports the conditions necessary for successful distributed leadership – their preferred leadership style. Given the nature and purpose of the EPQ as dependent upon and a developer of independent, student-led learning, the presence of both distributed leadership and distributed power would appear to be a key factor in determining the successful enactment of the programme.

7. The views of students, and their capacity to interact with varying contextual dimensions as part of the EPQ enactment process, should not be underestimated or ignored

During the process of data analysis and evaluation, it became apparent how much more important it was to take note of students' observations than had originally been anticipated. In effect, as was borne out by their views and opinions when interviewed, EPQ students have been fully engaged in the process of interacting with the array of contextual dimensions surrounding them in just the same ways as adult informants to this study. This is significant and suggests that their involvement in the interpretation/translation elements of EPQ enactment may also be a major contributor to the successful enactment of the EPQ. Clearly, student voice strategies have been regularly implemented in all three centres in an attempt to collect feedback from students but these have mostly been online surveys offering limited opportunities for focused discussion and reflection which, as earlier noted, are essential for productive interpretation/translation to take place. During group interviews, however, such circumstances did occur, resulting in a number of insightful observations which potentially hold implications for all centres:

- Students from all three centres drew attention to the challenges they had encountered at the start of their EPQ, particularly their need for greater clarity regarding the EPQ process and what was expected of them. To sustain student motivation and commitment to the programme, it would seem logical that centres invest adequate time *at the start* to ensure a firm grounding and induction into the qualification and the necessary skills.
- Perhaps the most negative comments received about the EPQ were students' views on the amount of paperwork to be completed as evidence of their achievement in the process; exam boards may well be aware of this but rumours of excessive paperwork requirements tend to reinforce the EPQ's reputation as primarily an 'academic' programme and may well inhibit less able students from applying.

- Both students and supervisors stressed the value and importance of providing timetabled supervised lesson times for the EPQ, even though they acknowledged some limitations in this approach, especially for those preparing artefacts or performances.
- Students were conscious of a lack of funding available for project development that, for some, could well inhibit their ambitions, creativity and the level of sophistication or quality of project outcomes, potentially result in an unfair advantage for more affluent candidates. Although some support appears to be available, including access to university facilities and equipment, more could be done to publicise such opportunities.

- 6.2.3 Impact on the researcher

The design of my research was guided by constructivist grounded theory (CGT) principles, particularly the work of Kathy Charmaz, with the methodology being selected on the basis that my intention was not to test an existing theory but to seek to derive – or define and construct – theory from data gathered, analysed and reviewed, via a range of sources. In effect, I pursued an interpretive-constructivist approach in order to seek knowledge through my investigations and, early on in researching the methodology, began to recognise myself as holding a primarily subjectivist viewpoint. This was exemplified in my research objectives - to understand how and why individuals involved with the EPQ ‘create, modify and interpret’ their world in the way they do (Cohen *et al*, 2018: 6).

Engaging with CGT as one of two ‘strategies of inquiry’ used for this research (Cresswell, 2003) was, in my opinion, most appropriate for my purposes. Nevertheless, I was conscious that this was the first time I had used CGT techniques and therefore, it would be very much a learning experience. On the

basis of extensive background reading, I estimated that the constructivist approach was clearly more in harmony with my research aims than other iterations of grounded theory but took a pragmatic view that it might ultimately prove impossible to implement all its various tools and procedures.

I eventually developed a six-step approach to guide my research design, based on Charmaz' six 'analytical steps' (Section 3.3.3), within which I incorporated the use of memo-writing and maintaining a methodological diary. Both have proved invaluable techniques for capturing and reflecting upon observed phenomena and I have since applied the skills in other contexts.

Undoubtedly, my greatest learning curve as a CGT researcher occurred when I endeavoured to code fieldwork data against a pre-determinate categorisation framework of known EPQ topics. This did not work, primarily because the categories selected were heavily influenced by my personal knowledge and prior experience of the EPQ. Thus, they conflicted with my aspiration to perceive, as far as possible, EPQ enactment 'through the eyes of my informants'. As soon as I moved to interacting with the data using a *responsive* categorisation stance, with the aim of understanding informants' views and actions 'from their perspective' (Charmaz, 2014: 115), the coding process began to make sense of the data presented. The subsequent initial and focused coding processes, although quite prolonged in terms of defining and redefining the evidence, were successful in developing the analytical framework underpinning findings presented in Chapters 4 and 5.

My perceptions of the role of interviewer has transformed into more that of a 'traveller' alongside the interviewee (Brinkmann & Kvale, 2015) in which I am now far more sensitive to the potentially negative effects of researcher bias on the reliability of findings. Similarly, I have become more of a reflexive interviewer, regularly questioning my intentions, together with the validity and

purpose behind my various interventions and the impact I might be having on my respondents, both intentionally and unintentionally.

With regard to my understanding of post-16 education, and the EPQ in particular, undertaking this study has greatly enhanced my awareness of the far-reaching impact of politics and educational policy on practice – and vice versa. My understanding and admiration of sixth form colleges has grown tremendously, not least because of the advantages they can offer to students over other forms of Further Education. For example, students appear more likely to be treated as adults but still supported on their learning ‘journey’ in an age-appropriate manner. Moreover, the size of such institutions is not only likely to enable a broader range of curriculum and enrichment opportunities, but also to support *timetabled* EPQ provision and access to a sophisticated range of research sources, facilities and expertise.

Early assumptions held about the three case study centres and their EPQ enactment changed radically as I got to know them better. I began to recognise how policy/strategic thinking and resultant operational procedures outside the EPQ could have a massive impact on its enactment, both for good and ill, and how a centre’s culture and ethos could be firmly embedded into its enactment. Conversely, I began to see how much the EPQ could and did influence whole-institutional policy and practice in unexpected ways. The opportunity to include the perspectives of Principals and SLT in the case study also provided me with a far more realistic insight into the impact of leaders and leadership on practice.

My understanding and admiration for the EPQ itself has also increased exponentially. I believe it to have made a tremendous though sometimes unrecognised impact in the case study centres in which it has been fully and purposefully embedded, and that other centres where it is delivered would

benefit from building in more time for reflective consideration of its enactment in order to get the best from it for their centre.

Finally, taking full responsible for the whole research process and all its components – from developing the initial idea, constructing research questions, planning and conducting fieldwork and data analysis to writing up the results – has given me immense satisfaction and an increased sense of confidence in my ability as a researcher.

6.3 Research potential

- 6.3.1 Benefits to stakeholders

Within this Section, a range of potential opportunities and benefits available from this research are summarised, focusing on the perceived needs of various key EPQ 'stakeholders': schools and colleges, HEIs and employers, exam boards responsible for the EPQ and finally, policy makers.

- **For schools and colleges**

For lead EPQ Coordinators, there is scope to draw on and make comparisons between their centre's EPQ provision and enactment processes and the case study examples presented in this thesis; they could also use them to search for ideas and solutions. Other staff also, including supervisors, librarian/LRC staff and senior managers can find practical suggestions and inspiring possibilities. In addition, senior managers will find examples of what their counterparts think about the EPQ and how they have acted, reacted and interacted in response to the unique set of contextual dimensions affecting their particular institution. When making plans and decisions for the future of the EPQ in particular, there is much to consider herein which might encourage the decision makers to think differently about student and staff needs.

Secondly, lead EPQ Coordinators would be advised to take on board the benefits of the enactment process, particularly in terms of interpretation and translation – and to recognise that these need time and opportunity to occur productively. Information in the thesis could be used as useful background material for raising staff awareness of the EPQ and for conducting training with supervisors, perhaps encouraging them to reflect on aspects of their own pedagogical practice in light of case study centre examples. Equally, material from the study could assist Coordinators in improving their existing support systems for students and for supervisors. They might also be inspired to identify some of the specific contextual dimensions affecting their EPQ enactment and which may be aiding or inhibiting success – how might they be addressed or overcome? Applying Ball *et al*'s typology of enactment 'actors' to EPQ actors in their own centre might also be enlightening and could indicate ways in which practice might be improved.

Finally, there is potential for practising teachers and tutors to conduct small-scale action research projects in their own centre – or even with other local EPQ centres – using (or adapting to suit individual priorities) materials such as the Opinion Finder activity and interview schedules freely available in the Appendices, as well as the conceptual and analytical frameworks. This could be particularly useful when gathering evidence on the undoubted value and/or future viability of the EPQ to present to governors or for ascertaining in greater depth the perceptions of EPQ participants (students) and contributors (supervisors) with a view to confirming or challenging one's own assumptions and to enhancing the student/supervisor experience.

- **For HEIs and employers**

In addition to the detailed description of the EPQ given in Chapter 1, and its historical background in the literature review, case study evidence could be scrutinised by external partners for ideas on how to develop mutually

beneficial partnerships with EPQ centres; they could also learn from accessing informants' comments as to what works for them and what is needed to support EPQ programmes, and those who run them. Contrary to popular belief, the needs may not always be to do with the students, or with finance.

- **For Exam Boards**

It is hoped that the findings in this study may serve to broaden the perspectives of exam board representatives with regard to the needs and expectations of a wider range of centre communities involved in EPQ delivery, leading to reflection and review of current support systems. However, it is appreciated that the majority of exam boards are already very active in encouraging dialogue and feedback from their centres for this purpose. The literature review, including the Dearing-Tomlinson comparison, may also be of use to researchers linked to the exam boards.

- **For policy makers at national level**

The study contains rich data and an intriguing insight into EPQ enactment *from an insider's point of view* – this is a form of 'feedback' which deserves to be taken into account as further policy is developed (as noted in the literature review, practice can and should inform policy). In particular, the thesis contains a number of valuable suggestions for policy makers regarding the potential of the EPQ in other education sectors. Idea put forward by informants included an EPQ for the adult education and apprenticeship sectors, the possibility of developing a Level 4 EPQ for high flyers in the FE sector and the secure building of an EPQ-style qualification into future plans for technical/vocational education. This latter suggestion would require careful marketing to both employers and students, as well as some possible restructuring of the qualification's specifications, in order to make it more accessible and relevant for candidates in a work-related environment. However, they should surely not be restricted to researching topics of a solely

work-related nature – one of the most important findings of this study has been the motivation gained by students (and their supervisors) from being given the freedom to choose and research a topic of personal interest.

- 6.3.2 Future research opportunities

It would be useful to replicate this research model in a group of schools with sixth form EPQ cohorts in order to compare the findings with those from sixth form colleges (SFCs). Outcomes could inform school sixth forms, policy makers and EPQ exam boards on ways in which EPQ programmes in this particular type of setting might be enhanced, strengthened and better supported.

Similarly, the model could be adapted for application in FE colleges with a view to identifying what may be the implications for such large institutions when delivering the EPQ. Lessons could be learnt for all settings by comparing EPQ practice in FE colleges – for example, on how to increase employer engagement and employability skills development through the EPQ – with findings from schools and SFCs.

The role of centre librarians and LRC staff unexpectedly emerged as being a valuable asset to successful EPQ teaching and learning. Therefore, comparative research into EPQ-related contributions made by librarians, including the collection of exemplary partnership practice with EPQ staff, could guide and inspire other librarians interested in contributing to the programme

Further research could be conducted, based on findings from this study, into ways in which the EPQ both evidences and influences teaching and learning enactment in other curriculum and enrichment contexts, and also how it can help to build a centre's cultural aspiration of becoming a successful 'learning community'.

In addition, case study research into the student-supervisor relationship could be undertaken in order to establish how interpretation/translation and re-interpretation/re-translation occurs in this dynamic context. What can be learnt that might help improve the EPQ experience for both players?

It would seem particularly timely if research were to be conducted into the potential of integrating EPQs into the study programmes of vocational and technical education learners, with the intention of identifying ways in which the EPQ might be adapted to suit the needs of these students and of employers/industrial sectors.

Research could also be undertaken into identifying those aspects of leadership and different leadership styles that may be acting as enabling or inhibiting factors impacting on successful EPQ enactment. This could also be expanded to include further investigation into issues of power and empowerment.

Finally, it would be interesting to re-run this research programme with a contrasting group of sixth form colleges, such as those where the EPQ is struggling for survival or where it has only recently been introduced, in order to compare (and possibly verify) findings and, hopefully, to be able to provide new research informants with ideas for improvement.

6.4 Concluding observations

Overall, this study has achieved the aims it set out to address and, in the process, has contributed new knowledge to the existing body of related educational research. It has brought together a substantial amount of background information on the EPQ, its origins and purpose and how it has evolved since its inception, in relation to the political and other contextual circumstances of the times. In addition, it offers new understanding regarding Ball *et al*'s concept of 'enactment', by applying it to a specific post-16 learning

programme, the EPQ, as a means of determining factors generating success. In the process, particular attention has been drawn to the importance of 'translation' and the fact that *how* EPQ actors interrelate with contextual dimensions, rather than *what* the contexts are, would seem to be the most crucial factor in generating and sustaining the EPQ's successful enactment.

Although the study's value may be limited in terms of its generalisability, it has nevertheless produced a substantial amount of evidence of use as a basis for further exploration, together with exemplars to help guide EPQ practice in other centres and thus to help secure the future of this unique qualification. The contributions made by research informants, including time, access to centre teaching resources, policy documents and EPQ archives, as well as opportunities for observation of lessons and other events, have been freely and enthusiastically given. Moreover, the case studies involved a mix of EPQ 'actors' not always achievable in the study of a single qualification, namely, Principals, SLT, middle managers, teaching staff, librarians and students. It is sincerely hoped that the experience of participating in this research will have been of benefit to them as well.

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Appendices

A. Case study centre 'actors/enactors' - interviewees

	SFC1	Additional EPQ roles	SFC2	Other roles	SFC3	Additional EPQ roles
Principal	Josh1		Steve2		Leanne3	Supervisor
SLT	Mary1	Supervisor	Vernon2		Jenny3	Supervisor
Lead EPQ Coordinator	Harriet1		Ravi2	Supervisor	Naomi3	Supervisor
Supervisor 1	Farida1		Desreen2		Guy3	
Supervisor 2	Linus1		Paul2		Tanisha3	
Supervisor 3	Erica 1					
Supervisor 4	Shane1					
Librarian/ LRC staff	Arthur1		Enid2		Lois3	
Students	Bella1		Anna2		Aysha3	
	Helen1		Ellie2		Kitty3	
	Linda1		Kathy2		Lorna3	
	Pam1		Sam2		Rachel3	
	John1		Ivy2		Brian3	
	Joseph1		James2		Rex3	
	Mark1		Tim2		Stuart3	
	Oliver1				Tyrone3	

B. Conceptual Framework

Process of enactment	Policy enactment (based on Ball <i>et al</i> , 2012)	EPQ Learning Programme enactment
DEVELOPMENT: Encoding – what comes into the institution, either as a concrete entity or as an ‘influence’ from external sources/policy makers	‘(T)exts and ‘things’ (legislation and national strategies) ... also ... discursive processes that are complexly configured, contextually mediated and institutionally rendered.’ (Ball <i>et al</i> , 2012:3). Often “written” by government, their agencies or other influential stakeholders’ (ibid:2)	Specification (detailed description of work to be done, based on policy/ideology) as interpreted by awarding bodies, plus supporting artefacts and opportunities to participate in internal and external discursive processes – all may be ‘complexly configured’ and are likely to be ‘contextually mediated and institutionally rendered.’
INTERPRETATION: Decoding – ‘an engagement with the languages of policy...’; ‘the process of meaning-making which relates the smaller to the bigger picture (Fullan, 2001:8) that is, institutional priorities and possibilities to political necessities.’ (Ball <i>et al</i> , 2012:44-45)	‘(A)n initial reading, making sense of the policy – what does this text mean to us? What do we have to do? Do we have to do anything? ... a decoding which is both retrospective and prospective (Ball 1993).’ (Ball <i>et al</i> , 2012:43) Using texts as ‘frames’ to help ‘focus’ institutional activity – these ‘engage staff in discussion and seek to encourage their ‘ownership’ of new policy ideas....’ (ibid:44)	Ideally, this element of the enactment process would be exactly the same for a learning programme such as the EPQ – but to what extent does this occur in reality? And by whom? Could this be one of the most important keys to successful overall delivery of the programme, via translation, or is it more to do with the ways in which these interpretations become translated to fit in with the enactment context?
TRANSLATION: Recoding – ‘closer to the languages of practice ... a sort of third space between policy and practice.’ (Ball <i>et al</i> , 2012:45)	Policy texts ‘cannot simply be implemented’ but have to be translated from text to action – ‘put ‘into’ practice in relation to history and to context, with the resources available.’ (Ball <i>et al</i> , 2012:3)	If the EPQ learning programme is to be successfully integrated into the post-16 curriculum offer, senior managers, teachers, supervisors/ coordinators need to consider history and context, including the culture, values and vision, of their institution, and the resources available internally and externally, including the potential learner audience; learners themselves will also ‘translate’ the EPQ as they interact with it.
OPERATIONAL: Practices and Procedures (based on Bell & Stevenson, 2015:148)		

C. Analytical framework

CONCEPTUAL THEMES	FOCUSED CODES	Code descriptions
<p>A. DEFINING CONTEXT</p> <p>Setting the scene – getting to know the individuals in terms of who they are, their working/learning contexts and their received understanding of the EPQ</p> <p><i>Relates to Stage 1: Development</i></p>	<p>1. Locating self (in relation to the EPQ)</p>	<ul style="list-style-type: none"> • <u>Background</u> details – that may help to explain and/or justify one’s own interpretation of the EPQ, one’s own actions and how one’s opinions may have emerged and adapted over time
	<p>2. Locating the centre, i.e. institution</p>	<ul style="list-style-type: none"> • <u>Contextual awareness and interpretation</u> of the centre environment and communities of practice affecting the EPQ - how/why they function in specific ways that may have bearing on why the EPQ learning programme functions as it does
	<p>3. Locating the EPQ</p>	<ul style="list-style-type: none"> • <u>Received</u> wisdom about the EPQ – ‘what I’ve been told’ which I may have interpreted to some degree – indicating the influence of external and internal contexts + one’s experience of how things have been communicated and how these may help shape personal opinions
<p>B. DETERMINING ATTITUDES & OPINIONS</p> <p>‘Determining’ is used in 2 ways here –</p> <p>a) descriptive of the attitudes/opinions expressed, in that they determine how the respondent views the EPQ and how they participate in it (active and passive); and</p> <p>b) describing ways in which the respondent has <i>formed</i> their attitudes and opinions, i.e. the emerging focused codes actually express</p>	<p>4. Interpreting & translating the EPQ</p>	<ul style="list-style-type: none"> • Evidence of the process of making sense of the EPQ – interpreting the ‘received wisdom’ (stage 2) and adapting or translating it (stage 3) to best suit the specific learning centre/learners/providers, given the circumstances
	<p>5. Making value judgements</p>	<ul style="list-style-type: none"> • ‘I think’ types of statements which clarify a person’s own values and/or their impressions of quality and impact, or their impressions of others’ views and opinions
	<p>6. Feeling uncertainty</p>	<ul style="list-style-type: none"> • Respondents expressing uncertainty about how they view the EPQ, their centre’s enactment of it, their/others’

<p>different actions they have adopted</p> <p>Relates to Stages 2 & 3: Interpretation and Translation</p>		<p>involvement in it – responses may reflect lack of factual knowledge or experience</p>
	7. Speculating	<ul style="list-style-type: none"> Blue sky thinking – not necessarily founded on hard facts but suggestions as to why certain things ‘are’ and what they might do about them – not always firm decisions
	8. Identifying expectations & needs	<p>8a) defining expectations –</p> <ul style="list-style-type: none"> What one expects others to do/be and about the EPQ learning programme <p>8b) understanding needs –</p> <ul style="list-style-type: none"> Indications of how the respondent views others’ needs and how well they understand themselves
<p>C. ACTING & INTERACTING</p> <p>Evidence of <u>what</u> the respondents are actually ‘doing’ and ‘being’ and what is ‘being done’ to them, rather than their opinions on these actions</p> <p>Relates to Stage 4: Operational practices and procedures</p>	9. Participating in the EPQ	<ul style="list-style-type: none"> Evidence of <u>what</u> one is <u>doing</u> as an EPQ participant, contributor or stakeholder and of what is <u>being done</u> to one by others – with the exception of management and coordination roles/actions
	10. Managing EPQ demands	<p>10a) what, when, where & how</p> <ul style="list-style-type: none"> Evidence of <u>how</u> one is managing, coordinating or organising one’s/others’ actions in respect of the demands made by running/participating in the EPQ programme <p>10b) who and why –</p> <ul style="list-style-type: none"> Evidence of how one is managing to work with/interact with other communities with regard to the EPQ learning programme
	11. Reviewing & evaluating	<ul style="list-style-type: none"> Evidence of <u>actions taken</u> to review and/or evaluate one’s own actions, the actions of others and the overall quality of the programme/its benefits for participants
<p>D. EFFECTING RESULTS</p> <p>This section aims to capture evidence of the outcomes or</p>	12. Responding to EPQ learning experience	<ul style="list-style-type: none"> Outcomes resulting from direct experience of the programme – what respondents have found

<p>'products' resulting from respondents participating, 'acting' or 'being acted upon' in various ways in the EPQ programme – these in turn may influence ongoing programme interpretation, translation and ultimate operation and help to shape/reshape the context</p> <p><i>Relates to all 4 Stages of EPQ Learning Programme Enactment</i></p>		works/works less well for them, on an individual and a collective basis, and their levels of satisfaction
	13. Forming EPQ-related futures	<ul style="list-style-type: none"> Outcomes from reviewing and evaluating the EPQ – respondents' ideas and justifications for further shaping existing provision
	14. Appreciating EPQ-related benefits	<ul style="list-style-type: none"> Beneficial outcomes – both short, medium and long term – gained as a result of interacting with the programme in different ways; outcomes may be 'hard/tangible' (skills development, qualification, UCAS points) or 'soft' (feelings, emotions) and include both personal gains and defining what others gain
	15. Encountering EPQ-related challenge	<ul style="list-style-type: none"> Challenging aspects and experiences – outcomes or 'products' emerging as a result of interacting with the EPQ (as well as other examples of challenge noted by respondents)
	16. Recognising EPQ-related success	<ul style="list-style-type: none"> Outcomes in terms of successful aspects of the programme and factors aiding or inhibiting success

D. Comparison of policy and EPQ actors/enactors

Policy actors (Ball <i>et al</i> 2012:49)	Policy work	EPQ actors & their work
Narrators	Interpretation, selection and enforcement of meanings	Principals and SLT; Head of Post-16 curriculum – <ul style="list-style-type: none"> • leadership, interpretation, prioritisation
Entrepreneurs	Advocacy, creativity and integration	Centre EPQ Coordinator – <ul style="list-style-type: none"> • advocacy, interpretation and translation, change agent, originality and creativity, recruitment
Outsiders	Entrepreneurship, partnership and monitoring	Awarding bodies; business/community partners – <ul style="list-style-type: none"> • ‘interpreters of interpretations’ (Rizvi and Kemmis, 1987, cited in Ball <i>et al</i>, 2012), translators in partnership with teachers and students (and other partners); monitoring and evaluating
Transactors	Accounting, reporting, monitoring/supporting, facilitating	SLT; HE/Business liaison; Bursar; Centre EPQ Coordinator – <ul style="list-style-type: none"> • interpretation: accounting, reporting, value-decisions, budget (resource and staffing) allocation / facilitating, monitoring / supporting
Enthusiasts	Investment, creativity, satisfaction and career	SLT; Centre EPQ Coordinator; EPQ supervisors; students; parents; external partners – <ul style="list-style-type: none"> • translators/interpreters, activists, inspirers, recruiters, ‘investment, creativity, satisfaction and career’
Translators	Production of texts, artefacts and events	Centre EPQ Coordinator; EPQ supervisors and students; Awarding organisations – <ul style="list-style-type: none"> • promote collective enactment, collaboration and cooperation to translate text/specifications into action (learning and teaching)
Critics	Union representatives (reps.): monitoring of management, maintaining counter-discourses	EPQ supervisors; other non-participating staff including SLT; students, parents – <ul style="list-style-type: none"> • interpretation, observers of and commentators on impact, monitoring of management
Receivers	Coping, defending and dependency	Less experienced EPQ supervisors and centre EPQ Coordinators – <ul style="list-style-type: none"> • compliant, less creative interpreters and translators, reliant on texts and guidance ‘as given’

E. Opinion Finder Activity

WHAT'S THE POINT OF AN EPQ? – Opinion finder activity

YOUR NAME: YOUR CENTRE:

***In grids A and B, please TICK one statement only**

*A. The EPQ is:-	My view	
• an ACADEMIC qualification		
• a VOCATIONAL qualification		
• both ACADEMIC <i>and</i> VOCATIONAL		

*B. The EPQ is:-	My view	
• a passport to UNIVERSITY		
• a passport to EMPLOYMENT		
• a passport for BOTH DESTINATIONS		

****For grid C, please tick each statement: ONCE for LOW IMPORTANCE; TWICE for MEDIUM IMPORTANCE; THREE TIMES for HIGH IMPORTANCE**

**C. An EPQ offers opportunities for:-	My view	
• Extending learning from other courses, e.g. A levels or BTEC		
• Investigating something unrelated to other programmes of study		
• Personalised, student-centred learning		
• Practising higher level/critical thinking		
• Developing specific skills, e.g. research; project management		
• Developing positive attitudes, e.g. to lifelong learning		
• Developing positive behaviours, e.g. as independent self-starters		
• Active citizenship		
• Engaging with business/work/career plans		
• Local community involvement		

F. Interview Schedule 1 - Stakeholders

DOCTORAL RESEARCH INTO EPQ ENACTMENT CASE STUDY CENTRE INTERVIEW SCHEDULE EPQ STAKEHOLDERS: PRINCIPAL/SLT MEMBERS

STAKEHOLDER'S NAME:

CENTRE:

DATE:

INTRODUCTION

This interview is part of a doctoral research project currently being undertaken by Faith Muir at the Centre for Education Studies (CES), University of Warwick. Its purpose is to gain an understanding of your views regarding the Extended Project Qualification programme in your centre and some of the contextual factors that may influence its delivery.

It would be helpful to record this interview solely for the purposes of analysing the data. What you say will not be attributed to you, personally, or to your centre, but will inform my thesis. The recording will be kept securely and destroyed on completion of my research.

(Check that the interviewee has received and signed a copy of the information sheet and consent form, and address any questions/concerns before starting the interview.)

- **OPINION FINDER ACTIVITY TO BE COMPLETED PRIOR TO INTERVIEW**

PART A: GENERAL BACKGROUND

1. **How long have you been in your current role at XXX centre?** *Prompt for: previous leadership/management roles held; subject specialism.*
2. **During that time, what, if any, involvement have you had with the EPQ programme?** *Prompt for: other experiences of project-related teaching and learning, e.g. IB.*
3. **PRINCIPALS ONLY: How would you describe your leadership style and what are the key values that underpin it?** *Prompt for: degree of emphasis placed on distributed and/or inclusive leadership.*
4. **How would you describe the ethos and culture of your centre – and to what extent does this reflect your (Principal's) leadership style?** *Prompt for: vision communicated by SLT; how it's evidenced; key*

influencing factors and priorities – internal and external, e.g. students/staff/parental engagement/ business and community involvement/Ofsted/league tables?

5. **Is this likely to change in any way in the near future, and if so, why?**
6. **In terms of your centre's curriculum and enrichment provision, what do you see as the main challenges and opportunities regarding teaching and learning?** *Prompt for: internal and external influences*

PART B: BACKGROUND TO THE EPQ

7. **When did your centre introduce the EPQ and why (if known)?** *Prompt: how did it enhance existing post-16 provision; has the purpose and/or structure changed over time?*
8. **What makes the EPQ distinctive and an asset as a qualification, compared with other post-16 programmes, e.g. the IB?** *Prompt for: the qualification in general; selected Awarding Body's approach; benefits for students/staff/other beneficiaries; how this influences the way the programme is run, e.g. timetabling/staffing/funding/recruitment).*
9. **What aspects do you find difficult or less helpful about it, and why?** *Prompt for: management and resourcing factors, including funding, timetabling, recruitment; staffing; delivery aspects for students/supervisors; level of internal/external support.*
10. **What, if anything, would improve the EPQ as a qualification?**

PART C: INTERNAL MANAGEMENT AND DELIVERY ISSUES

11. **What impact has the EPQ programme had to date in your centre?** *Prompt: on students, staff, parents, other stakeholders; overall curriculum and enrichment provision – how does it add value to the institution's 'brand'; level of centre commitment shown to the EPQ; level of support?*
12. **What are the more successful aspects of your EPQ programme?** *Prompt: management/coordination and delivery.*
13. **What do you see as potential areas for development and why?**
14. **In what ways would you say the programme reflects the ethos and culture of your centre?** *Prompt for: policy influences; other key factors,*

e.g. business or community engagement; HEI involvement; leadership values.

- 15. What are the main pressures and constraints currently affecting management and delivery of the programme?** *Prompt for: how these factors have been/are being addressed; resources; staffing; timetabling.*
- 16. What are your hopes and plans for the future of your EPQ programme?**

Thank you very much for your time.

G. Interview Schedule 2 – Contributors: Centre EPQ Coordinator

DOCTORAL RESEARCH INTO EPQ ENACTMENT CASE STUDY CENTRE INTERVIEW SCHEDULE

EPQ LEAD COORDINATOR: INITIAL INTERVIEW

COORDINATOR'S NAME:

CENTRE:

DATE:

INTRODUCTION (see Schedule1)

- **OPINION FINDER ACTIVITY TO BE COMPLETED PRIOR TO INTERVIEW**

PART A: GENERAL BACKGROUND

1. **How long have you been an EPQ Coordinator and what do you see as your main responsibilities in that role?**
2. **Why do you feel you are suited to the role?** *Prompt for: relevant skills and abilities; past experience; other roles in the college/school.*
3. **How would you describe the ethos and culture of your college/school?** *Prompt for: vision communicated by SLT; how it's evidenced; key influencing factors and priorities – internal and external, e.g. students/staff/parental engagement/ business and community involvement/Ofsted/league tables?*
4. **Is this likely to change in any ways in the near future, and if so, why?**
5. **In terms of your centre's curriculum and enrichment provision, what do you see as the main challenges and opportunities regarding teaching and learning?** *Prompt for: internal and external influences*

PART B: BACKGROUND TO THE EPQ

6. **When did your centre introduce the EPQ and why (if known)?** *Prompt: how did it enhance the existing post-16 provision; has the purpose changed over time?*

7. **Why was XXX selected as your Awarding Body for the EPQ? What are the resulting advantages or disadvantages, if any?** *Prompt for: any changes over time and the reasons*
8. **What makes the EPQ distinctive as a qualification, compared with other post-16 programmes, e.g. the IB?** *Prompt: the qualification in general; selected Awarding Body's approach; benefits for students/staff/other beneficiaries.*
9. **What aspects do you find difficult or less helpful about it, and why?** *Prompt: management aspects; delivery aspects for students/supervisors*
10. **What, if anything, would improve the EPQ as a qualification?**

PART C: INTERNAL MANAGEMENT AND DELIVERY ISSUES

11. **What impact has the EPQ programme had to date in your centre?** *Prompt: on students, staff, parents, other stakeholders; overall curriculum and enrichment provision – how does it add value; level of centre commitment shown to the EPQ; level of support?*
12. **What are the more successful aspects of your EPQ programme?** *Prompt: management/coordination and delivery.*
13. **What do you see as potential areas for development and why?**
14. **In what ways would you say the programme reflects the ethos and culture of your centre?** *Prompt for: policy influences*
15. **To what extent has your EPQ programme changed over time? In what ways?**
16. **What other key factors have helped to shape or influence your EPQ programme, including its management and delivery?** *Prompt: business or community engagement; HEI involvement; access to resources.*
17. **What are the main pressures and constraints currently affecting management and delivery of the programme?** *Prompt for: how these factors have been/are being addressed; resources; staffing; timetabling.*

- 18. From your experience, what approaches or factors tend to:**
- a) aid student recruitment to the programme?**
 - b) encourage student retention?**
 - c) cause students to withdraw from the EPQ?**
- 19. How do you recruit, support and monitor your supervisors? *Prompt for: training; resources; monitoring systems.***
- 20. What are your hopes and plans for the future of your EPQ programme?**

Thank you very much for your time.

H. Interview Schedule 3 – Contributors: Supervisors

DOCTORAL RESEARCH INTO EPQ ENACTMENT CASE STUDY CENTRE INTERVIEW SCHEDULE

EPQ CONTRIBUTORS: SUPERVISORS/MENTORS

SUPERVISOR'S NAME:

CENTRE:

DATE:

INTRODUCTION (see Schedule1)

- **OPINION FINDER ACTIVITY TO BE COMPLETED PRIOR TO INTERVIEW**

PART A: GENERAL BACKGROUND

1. **How long have you been an EPQ Supervisor and what do you see as your main responsibilities in that role?** *Prompt for: any other contributions made to the programme; reason for taking on the role.*
2. **Why do you feel you are suited to the role?** *Prompt for: relevant skills and abilities; past experience; other roles in the centre.*
3. **How would you describe the ethos and culture of your centre?** *Prompt for: how the vision is communicated (by SLT); how it's evidenced; key influencing factors and priorities – internal and external, e.g. students/staff/parental engagement/ business and community involvement/Ofsted/league tables?*
4. **In terms of your centre's curriculum/enrichment provision, what do you see as the main challenges and opportunities currently affecting teaching and learning?** *Prompt for: internal and external influences*

PART B: BACKGROUND TO THE EPQ

5. **What makes the EPQ distinctive as a qualification?** *Prompt for: the qualification in general; selected Awarding Body's approach; benefits for students/staff/other beneficiaries.*
6. **How does it help to enhance the overall curriculum provision at your centre?** *Prompt for: its 'purpose' and whether/how this has changed over time.*

- 7. As a supervisor/mentor, how manageable do you find the requirements of the EPQ programme?** *Prompt for: student-supervisor relationship; time/timing; understanding what is meant by the role of 'supervisor' or 'mentor'; strategies used in delivering the supervisory role; assessment and moderation processes.*
- 8. What aspects do you find difficult or less helpful about it, and why?** *Prompt: management aspects; delivery aspects for students/supervisors; specific Awarding body requirements; strategies adopted for overcoming difficulties.*
- 9. What, if anything, would improve the EPQ as a qualification?**

PART C: INTERNAL MANAGEMENT AND DELIVERY ISSUES

- 10. How are EPQ supervisors recruited, supported and monitored in your centre?**
Prompt for: training provided – topics covered and frequency.
- 11. What, if anything, might improve the support you receive?**
- 12. What impact has the EPQ programme had to date in your centre?** *Prompt for: on students, staff, parents, other stakeholders; how does it add value; level of college commitment shown to the EPQ; level of support?*
- 13. What are the more successful aspects of your EPQ programme?**
- 14. And the potential areas for development?**
- 15. In what ways would you say the programme reflects the ethos and culture of your centre?**
- 16. [IF APPROPRIATE] From your experience, what approaches or factors tend to:**
 - a) aid student recruitment to the programme?**
 - b) encourage student retention?**
- 17. What are your hopes and plans for the future of your EPQ programme?**

I. Interview Schedule 4 – Participants

DOCTORAL RESEARCH INTO EPQ ENACTMENT EPQ PARTICIPANTS: STUDENT GROUP INTERVIEW

CENTRE:

DATE:

STUDENT NAMES:

INTRODUCTION (see Schedule1)

PART A: OPINION FINDER – complete form as individuals & return (5 mins)

PART B: THE EPQ EXPERIENCE – whole group discussion (10-15 mins)

- 1. What motivates you to complete your Extended Project?** *Prompt for: personal reasons, career aspirations, centre's promotion of the EPQ, other reasons.*
- 2. When you started the EPQ programme, what made you feel you'd be suited to the course?** *Prompt for: relevant skills, abilities, previous experience/ knowledge*
- 3. What factors influenced your project topic and the form it would take?** *Prompt for: the process with their supervisor/mentor, links with business/community; other internal/external factors or influences; forms – dissertation, extended essay, artefact, performance*
- 4. What makes the EPQ programme distinctive compared with other courses you're following?** *Prompt for: the teaching and learning process, benefits for students, role of the supervisor/mentor and student-supervisor relationship, time for/timing of the programme*
- 5. How do you organise working with your supervisors/mentors?** *Prompt for: frequency of meetings, ease of access, where/when they take place, how the sessions are arranged, their opinion on these arrangements*

6. To what extent do you have a say in how you're learning and the decisions that need to be made for your EPQ?
7. Do you ever get the opportunity to learn from each other when working on your EPQ? *Prompt for: occasions, types of skills/knowledge gained*

PART C: STUDENT OPINIONS ON THE EPQ – think-pair-share activity (20 mins)

1. Individual Task (5 mins)

Use the Post It notes (1 per item – stuck onto yellow card) to record:

- a) what you think you've gained so far from participating in the EP programme (orange)
- b) any aspects of the programme you've particularly enjoyed – why? (pink)
- c) any aspects of the programme that you've found difficult, not so easy to cope with or less helpful – why? (green)

	Gained	Enjoyed	Difficult
	•	•	•
	•	•	•
	•	•	•
	•	•	•
	•	•	•
	•	•	•
	•	•	•
	•	•	•
	•	•	•
	Recommendations on the EPQ		
	•		
	•		
	•		
	•		
	•		
	•		
	•		
	•		
	•		

2. **Paired review (8 mins)**
 - a) Compare your Post Its with a partner's – what if anything do you have in common with each other - does anything surprise you about your opinions?
 - b) With your partner, decide what 3 recommendations you would make to your school regarding ways in which the EPQ programme at XXX centre could be improved for students in the future (write them on white paper)
3. **Whole group recommendations (7 mins)**

Share your conclusions with the whole group

Thank you very much for your time.

J. Observations – summary of activities

CENTRE	Session type	Location	Participants	Focus	Observer role
SFC1-1	Taught session - timetabled	IT suite LRC/Library	Librarian 13 students	Research skills 1: finding sources online; evaluating resources and analysing data; referencing; library support available	Observation only
SFC1-2	Taught session - timetabled	Law/IT classroom	Supervisor 9 students (Law)	a) skills and attitudes - project management b) using a research diary; Students: a) skills audit; b) independent study c) PPR checks	Observation + participant = discussion with student on ethical issues - instigated by supervisor
SFC1-3	Taught session - timetabled	IT suite LRC/Library	Librarian x 2 13 students	Research skills 2: referencing; compiling a bibliography	Observation only
SFC1-4	HE motivational presentation for EPQ students – voluntary attendance	Lecture Theatre	External partner – HE c.45 staff & students	What is an EPQ; benefits for HE; research done with AQA on university attitudes to EPQ; developing a research question & lit review	Observation only
SFC2-1	Taught session - timetabled	Philosophy classroom with IT	Supervisor 10 students	Presentation skills practice (not with completed projects): 8 students presenting then questioned by student audience and supervisor; students complete feedback forms; 1-1 supervisory sessions with students	Observation + participant = discussions with students
SFC2-2	Taught session - timetabled	Philosophy classroom with IT	Supervisor 8 students	Presentation skills practice as above: 5 students presenting then questioned; feedback forms completed; 1-1 supervisory sessions	Observation only
SFC3-1	Taught session - timetabled	Classroom with IT	Supervisor 7 students	a) preparing evidence for grade prediction assessments; b) project management skills; c) research skills;	Observation + Participant = working with supervisor to question students in

				d) 3 tutorials with students e) independent study	tutorials
SFC3-2	Taught session - timetabled	Classroom with IT	Supervisor 9 students	a) progress update using peer pro forma b) preparation for Presentation Event in autumn c) 6 tutorials with students	Observation only
SFC3-3	Marketplace – Presentation Event	Hall	c.150-170 Presenters EPQ Coord. Supervisors Staff/student 'audience'	Each student to present their project using display board, verbal presentation to audience, written feedback - WWW/EBI with room for comments. Supervisors went round to carry out individual formal assessments	Participant = audience member for 12 presenters; talked to other students + supervisors
SFC3-4	Marketplace – Presentation Event	Hall	c.150-170 Presenters EPQ Coord. Supervisors Staff/student 'audience'	As above.	Participant = audience member for 12 presenters; talked to other students + supervisors

K. Observation field notes – pro-forma

CENTRE:	
DATE & TIME:	
OBSERVED EVENT:	
PARTICIPANTS:	Y 12/13 students – total: M = F =
	Session leader -
OBSERVER:	FM

Contextual information	
Observation notes	Comments
Follow-up notes	

PhD RESEARCH PROJECT: CASE STUDY CENTRES PROGRAMME CONTRIBUTORS - INFORMATION & CONSENT FORM

INTRODUCTION

Thank you for kindly agreeing to contribute to the doctoral research I am currently undertaking at the Centre for Education Studies, University of Warwick.

The research project is currently entitled:

The potential impact of policy/assessment enactment on successful delivery of the Extended Project Qualification (EPQ): a case study.

My deep interest in the development of the EPQ primarily arises from my experience as an evaluator of the qualification during its pilot phase (QCA, 2007-08). Later, I was involved as a co-writer of the national guidance materials on its implementation for schools/colleges and other stakeholders such as employers (QCA, 2008; QCDA, 2009). In both cases, I investigated many EPQ centres and was impressed by the quality and variety of approaches I witnessed in the different contexts and the way in which the qualification programme would constantly adapt in response to varying internal and external factors and challenges.

In my current research work, I plan to investigate in greater depth some of these potentially enabling/inhibiting factors and to consider how they may impact on successful EPQ programme delivery – or ‘enactment’ (Ball, Maguire & Braun, 2012¹) – within an institution’s post-16 curriculum provision. In this way, I hope to identify what might be some of the key criteria necessary for sustaining a successful EPQ programme, with a view to promoting effective practice in its management and delivery for existing and future centres.

THE CONTRIBUTION OF CASE STUDY CENTRES

In addition to conducting background research with national EPQ providers, players and policy makers, I have invited a number of EPQ centres (school-based sixth forms and sixth form colleges) to participate as case study centres. These institutions have been selected primarily because of their successful delivery of the qualification and ability to adapt the programme in response to changing circumstances and new opportunities as they arise.

Ethical Considerations

¹ Ball, S.J, Maguire, M. & Braun, A. (2012) *How Schools Do Policy: Policy enactments in secondary schools*. Abingdon, New York: Routledge. I believe there is a similarity between the process relating to ‘policy enactment’ and that used for enactment of a qualification programme such as the EPQ – in order for practices and procedures to be put into operation, they must be ‘developed’, ‘interpreted’ and ‘translated’.

This research project has been approved by the University of Warwick in accordance with their ethical guidelines. Therefore, in reporting findings from the case study investigations, the anonymity and confidentiality of all contributing organisations and participants will be preserved through never attributing information to them by name or referring to their centre, and by ensuring that all information supplied is securely stored.

The researcher holds a valid DBS certificate.

M. Consent form – Programme Contributors

PhD RESEARCH PROJECT: CASE STUDY FIELDWORK

The potential impact of policy/assessment enactment on successful delivery of the Extended Project Qualification (EPQ): a case study.

Thank you for agreeing to take part in this doctoral study. Your views and experiences of the EPQ programme in your Centre, particularly with regard to its purpose, management and delivery, will be very important in helping to clarify what may constitute key criteria necessary for sustaining effective enactment of the qualification.

If you wish to discuss any aspect of the research, please do not hesitate to contact Faith Muir: Direct line – 01494 77 8430; Mobile – 07813 615 997

EPQ PROGRAMME CONTRIBUTORS: CONSENT FORM

I confirm that I have read the above information sheet which I may keep for my records. I understand that my contributions to the research activities will be anonymised and that resulting data will be stored securely. I will be able to withdraw from the research at any point without detriment to myself or my organisation.

I consent to the following:

YES

NO

Please put an X in the relevant box(es)

A face-to-face or telephone interview

The interview being recorded (to facilitate the flow of discussion and aid analysis)

NAME:

ROLE/RESPONSIBILITY:

SCHOOL/COLLEGE:

EMAIL ADDRESS & TELEPHONE No:

Prior to interview, please return your completed form to:

Email:

Thank you.