

Principles & Practices for Primary Engagement

November 2016



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Foreword from Paul Drechsler CBE



Many businesses are already doing a fantastic job at engaging with education – as the recent CBI/Pearson Education and Skills survey shows 70% of firms have links with secondary schools.¹ But there are engagement opportunities that businesses and schools are missing out on.

“Some firms are leading the way, but in general primary schools have been a ‘business blind spot’. It’s time for employers to make primary schools one of their primary concerns.”

I shared these words at the 2015 Business in the Community (BITC) Education Symposium. In response, Prudential UK, a CBI member and part of the BITC’s Education Leadership Team took up the challenge and has demonstrated real leadership by defining these principles and practices for primary engagement.

I firmly believe that a year on from the symposium, these will make it much easier for businesses to seize the opportunity and partner with primary schools.

Disparity in educational achievement is one of the major challenges facing the UK today. Great education is part of the groundwork for the success of any child or young person and their career – so if we don’t get it right the impacts on a child’s life chances are long-lasting. Teachers play a critical role in developing and inspiring each and every child – it’s an incredibly valuable and challenging job. But other stakeholders have the opportunity to support teachers tackle the attainment gap too.

Businesses, alongside schools, parents and the government, have a fundamental role to play in supporting every child, regardless of background, in reaching their full potential. This is vital in order to help all children succeed in life and become inspired young adults, but also to build a diverse and productive workforce that will help to create economically viable and cohesive communities. It is also imperative if we are to ensure that the growing skills gap is finally narrowed.

Many businesses have established partnerships with schools enabling young people to engage with local employers. Whether that’s through programmes such as BITC’s Business Class or setting up schemes through direct links with schools. However, we know that some businesses struggle to make these connections. And this is particularly true with primary schools; as only 35% of business respondents to that same CBI/Pearson survey are engaged with primary years. This is a great start – but more can be done.²

Now it’s time for the success we’ve seen at secondary schools to be brought into primary education. It may not be as familiar a setting, but it’s just as valuable for pupils and we know that engaging throughout education is how we achieve long-term impact – so it’s just as rewarding for both the school and business.³ I would like every business to take the principles and practices to their local primary schools and, through collaboration, support them to ensure that all young people, regardless of postcode or family income, go on to reach their full potential in adult life.

Paul Drechsler CBE
President, CBI

About this report

This report has been commissioned by the following organisations:

Prudential UK:

Prudential UK is a leading investment and savings provider to approximately 6 million UK customers, with a vision of helping customers achieve their long-term financial goals.

Prudential UK's corporate responsibility strategy, in line with its business vision, is focused on tackling social inclusion, investing in helping people access opportunities, so that they can both contribute to and benefit from their communities.

In support of this, Prudential UK considers it a social, economic and business imperative that the country's young people are supported in gaining the essential life skills to succeed, and recognises the need to start as early as possible when shaping the employability and financial skills of future generations.

Consequently, it is involved in community investment programmes that deliver financial education and help young people become work-ready, alongside running its own apprenticeship programme. It is also a member of Business in the Community's (BITC) Education Leadership Team and the BITC National Champion for Primary Engagement.

Business in the Community (BITC):

BITC is the Prince's Responsible Business Network. Its members work together to tackle a wide range of issues that are essential to building a fairer society and a more sustainable future.

It is a business-led, issue-focused charity with more than 30 years' experience of mobilising business. It engages thousands of businesses through its programmes, driven by its core membership of more than 800 organisations from small enterprises to global corporations.

*** BITC Education Leadership Team members**

BP, Goldman Sachs, Jaguar LR, John Laing, Lloyds Banking Group, McKinsey & Company, Nationwide, Prudential UK, Robert Clark Comprehensive School, Teach First, UBS

One of the key issues it engages businesses on is education, with its vision being to create a day when the worlds of education and employment are aligned, and all young people leave school able to build successful working lives. Its mission is for all businesses across the UK to support young people in school through a long-term, needs-led collaborative business partnership, with a specific focus on those young people at risk of becoming marginalised.

Confederation of British Industry (CBI):

The CBI's mission is to help create a thriving UK economy that's good for everyone.

It provides its members with the influence, insight and access they need to plan ahead with confidence and grow. It represents their views as we work with policymakers to deliver a healthy environment for businesses to succeed, create jobs and, ultimately, drive economic growth and prosperity.

The CBI speaks on behalf of 190,000 businesses of all sizes and from all sectors. Together they employ nearly 7 million people, about one third of the private sector employed workforce. With 13 offices around the UK, as well as representation in Brussels, Washington, Beijing and Delhi, the CBI communicates the British business voice around the world. With more than 50 years of experience, it is the UK's most effective and influential business organisation.

With thanks to

Prudential UK, BITC and the CBI would like to thank all teachers and schools who contributed to the research; the business representatives and their education partners who attended stakeholder consultation sessions; and the BITC Education Leadership Team* for their feedback, support and endorsement of the Principles.

Introduction

The benefits of businesses getting involved with schools have been well documented by organisations including BITC and the CBI. Business engagement has been shown to improve young people's outcomes and have a positive impact on schools and teachers.⁴ It also brings a raft of benefits to businesses, helping them to make a genuine contribution to society and driving employee engagement and development.

Employer engagement has been predominately with secondary schools.⁵ This has led to calls for greater involvement with primary schools to address what the CBI has called an engagement 'blind spot'.⁶

Working with children from a young age⁷ can have a powerful impact on their aspirations, attitudes and behaviours. For example, in the area of financial literacy, children have already formed their money habits by the age of seven.⁸ Yet, financial education is not sufficient amongst this age group. A recent report published by the All Party Parliamentary Group (APPG) on Financial Education for Young People has called for this gap to be addressed.⁹

There is currently limited guidance for businesses looking to work with primary schools. This report seeks to address this gap and help tackle the 'blind spot'. It provides all UK businesses with **five key principles** for working responsibly and effectively with primary schools – with businesses encouraged to target schools in deprived communities and with the highest social need.¹⁰

These principles have drawn on insights from existing literature on business and employer engagement with the education sector, and have been developed as a result of qualitative research with schools and teachers undertaken in July 2016. A total of **25 teacher participants** took part in focus groups conducted across London, Manchester and Edinburgh, with a further **12 tele-depth interviews** held with schools from across the four nations.

'Primary school is where we lay the groundwork for a person's life, on which everything else is built.'

We need to give younger pupils every opportunity to find out more about the world around them and future possibilities to set them up well for secondary school.'

Paul Drechsler
CBI President, Nov 2015

They have also been tested with and further shaped by businesses – feedback was gathered in two roundtable sessions held in August 2016, attended by corporate representatives from a wide range of industries, alongside several of their education partners.

Who is this report for?

This report is for those working in corporate responsibility and community engagement/investment, HR, and external and public affairs within UK businesses of any size. It sets out:

- The case for your business to engage with primary schools
- Information on the primary school system that your business should consider when deciding when and how to engage
- A range of approaches your business can use to engage with primary schools
- Best practice guidance on how to get started

What's next – testing the Principles

We hope that you will find this report useful, and will apply the Principles and Practices to your own engagement activities. So that we can ensure they remain as relevant as possible, we welcome feedback from users on what has worked, and suggestions for development and improvement. Please send your comments to community@prudential.co.uk.

'To maximise the benefits of employer links with education, schools and colleges should arrange multiple interactions with employers, even of short duration, from an early age: more is more and variety is good.'

Education and Employers Taskforce ¹¹

Executive summary

Engaging with primary schools will allow your business to make a significant contribution to the lives of young people.

Our research shows that primary schools are keen to work with businesses and that your engagement has a positive impact on the lives of pupils and schools. Teachers have told us that business involvement:

- Raises aspirations and broadens the minds of children, exposing them to all career opportunities available
- Creates a real-life context for learning, building life skills in areas and industries previously unknown to children of primary school age
- Develops staff through training and sharing of knowledge
- Allows access to expertise that could not currently be provided or funded by the school
- Helps teachers in Scotland deliver the requirements of the Curriculum for Excellence

Engagement can also bring a number of far-reaching benefits to your business, including:

- Investing in UK plc
- Engaging and developing employees
- Developing your future workforce
- Improving your brand image, awareness and trust
- Enhancing your reputation in the community

The teachers and schools questioned during our research welcomed business support.

Targeting those schools where the social need is highest will ensure that your help and investment make the greatest possible impact.

Five principles for primary engagement

These five principles provide your business with key considerations, engagement opportunities and best-practice advice. The framework at the end of the report will help you get started and put the principles into practice.



1

Understand the primary school environment

An overview of the primary school environment and best-practice guidance on working with primary schools.

An implementation framework is also provided (page 33) – this is a step-by-step tool, guiding you through how to start engaging with primary schools.



2

Begin with school needs

Engagement is most effective when it aligns with school needs.



4

Build effective relationships

Six key characteristics that are crucial to forming effective relationships with primary schools.



3

Identify what your business can offer

A four-step planning tool to help you identify the best approach to engagement for your business.



5

Evaluate the impact

Key considerations for evaluation, to ensure that your engagement makes a positive impact and has measurable outcomes.

Why engage with primary?

Make a real impact

To date, relatively few businesses have engaged with primary schools compared to secondary, yet evidence shows that by engaging with pupils at a young age and supporting their schools, your business can make a significant impact.¹²

While any form of engagement can add value, to deliver the greatest positive impact, your business should seek to work with schools in deprived communities that have a clear social need. These schools typically fulfil at least two of the following criteria:¹³

1

50% of its pupils live in areas classified as being in lowest deciles of deprivation using Multiple Indices for Deprivation – a ranking system based on postcodes that provides a snapshot of the socio-economic backgrounds of the pupils. Pupil-specific indices exist, such as the Income Deprivation Affecting Children Index (IDACI) in England.

2

High % of Free School Meals (FSM) – an indication of the number of pupils that come from families with lower incomes, compared to the national average.

England average – 14.3 per cent (2016)¹⁴

Scotland average – 31 per cent (2015)¹⁵

Wales average – 18.4 per cent (2016)¹⁶

3

Below average attainment levels – if your business decides to work directly with a school, it will be able to provide information on its attainment levels in reading, writing and maths.

On raising aspiration:

'Raising aspiration is important in primary to open their eyes to the possibility of achieving their vision.'

Teacher Respondent

You can identify a school you might seek to work with in various ways – including on the basis of geography* (e.g. a school that meets these criteria and is close to your office), through an employee contact or using a database such as Edubase.¹⁷ Indicator averages vary by nation and are updated annually, with data available on national government websites.

**It should be noted that in order to impact social mobility, you may need to look further than your local vicinity to find schools in 'social mobility cold spots'¹⁸ such as coastal areas and industrial towns.*

Primary schools want your help!

Our research¹⁹ with teachers tells us that:

- Business involvement is important to schools across the UK
- Where business engagement is included in accountability measures – such as in Scotland where it is part of the Curriculum for Excellence – schools are better able to prioritise engagement
- Teachers recognise that business involvement is fundamental to raising aspirations and broadening children's horizons, exposing them to different career opportunities
- Schools are open to any kind of business engagement, and acknowledge that there are benefits for all involved

The research also highlights that engagement is more likely to be successful in achieving a rise in attainment and aspiration levels if:

- Business activity is linked to the curriculum and school needs
- Businesses are clear about what they can offer in terms of support or activity
- Partnerships with business are sustainably planned, with clear objectives and commitment from both parties
- The impact of partnerships and activities is measured, whether formally or informally. This is a key priority for schools

Generate benefits for your business

Engaging with primary schools can bring a range of benefits to your business. While benefits may vary, most fall into five key areas.

1. Investing in UK plc – by engaging with primary schools, your business will build positive relationships with local communities, creating long-term economic value for your business, society and the country by addressing school needs and challenges.

2. Developing your future workforce – by helping to shape young people's aspirations and develop skills in their formative years. Sparking primary pupils' interest in subjects such as science, technology, engineering and maths will increase the likelihood of them pursuing employment in these areas beyond school.

3. Engaging and developing employees – volunteering in primary schools can expand your employee's skills, in areas including public speaking, facilitation and presentation skills, which will enhance their day-to-day work and career development.

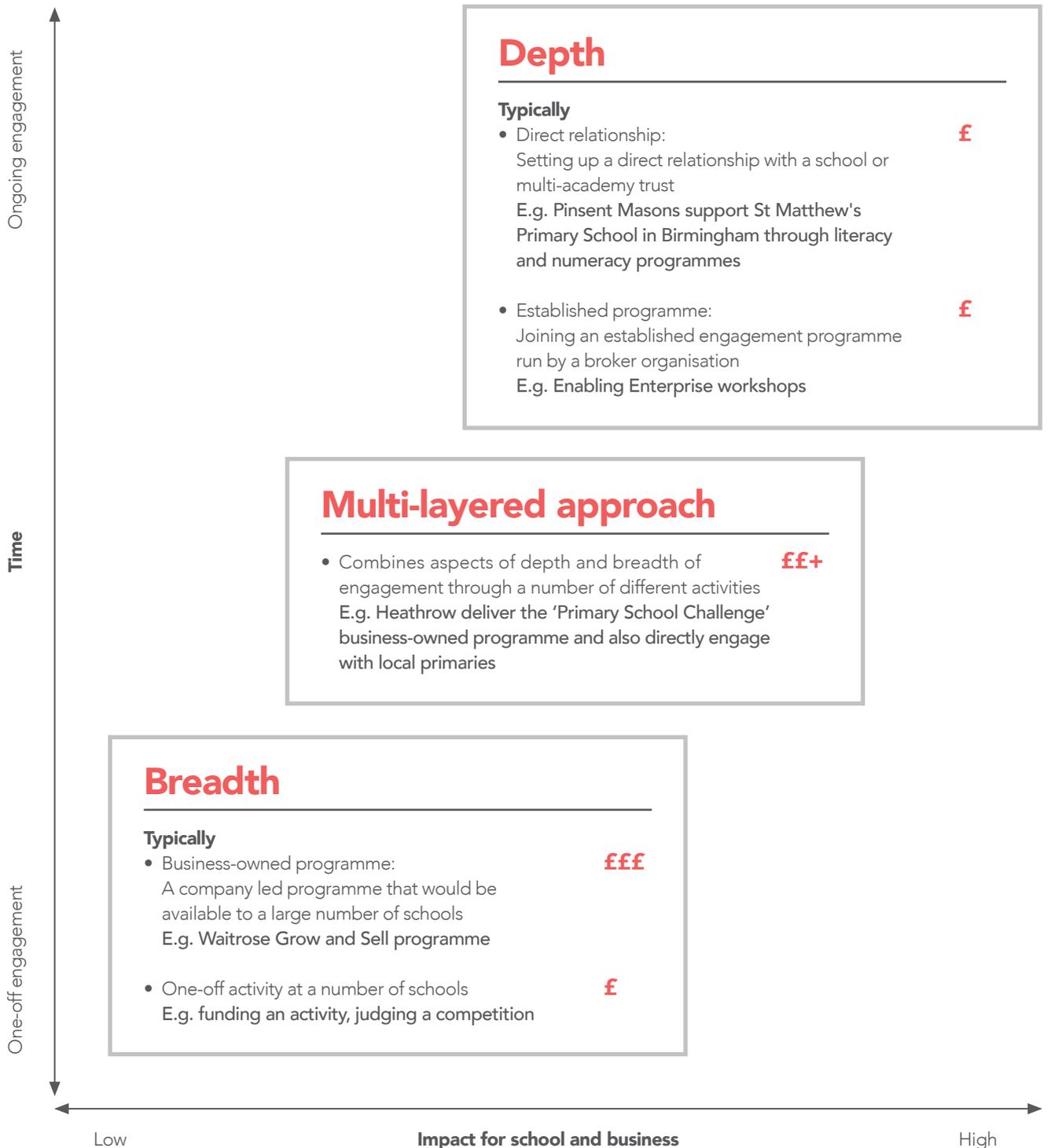
4. Improving your brand image, awareness and trust – by raising the profile of your business among pupils, staff, parents and the local school community.

5. Enhancing your reputation in the community – engaging with schools enhances your reputation in the community and increases your understanding of key audience groups, such as children, schools and parents – including existing or potential customers.

Explore different ways to get involved

There are **three** main ways in which businesses can engage with primary schools. Some businesses focus on one type of engagement, while others opt for a multi-layered approach combining two or more types. Principle 3 and Toolkit 1 will help you decide which approach is right for your business.

Although all types of engagement are valued by teachers and have a positive impact on pupils, engagement based upon long-term strategic relationships has been shown to deliver the most impact.²⁰





Five Principles for Primary Engagement



1 | Understand the primary school environment

An overview of the primary school environment and best-practice guidance on working with primary schools

Schools recognise that employees may not have been in contact with primary-aged children or schools for a long time. This section will help you to understand the primary school landscape and best practice when working with them.

What are the different types of primary school?

It is important to remember that each primary school in the UK is unique, shaped by its locality and demographic profile. In addition, the type of school it is will determine how it operates and what decision-making power it has.

Community schools

44 %



83 %



85 %



Indicative share of schools by nation ²¹

Found in England, Wales and Scotland. Controlled and funded by the local authority. Schools follow the national curriculum.

How does this affect engagement?

- Priorities might be set by local authorities
- Easy to link to curriculum, as standardised for each nation

Faith schools

31 %



46 % *



15 %



Indicative share of schools by nation

Found across the UK. Faith schools have to follow the national curriculum, but they can choose what they teach in religious studies. Faith schools may have particular admissions criteria and staffing policies, although anyone can apply for a place. The terms voluntary controlled/ aided are often used to describe faith schools.

How does this affect engagement?

- Easy to link to curriculum, as standardised for each nation
- May have stronger focus on spiritual, moral, social and cultural values

*Catholic

Grant controlled



48% Controlled

46% Catholic maintained

Indicative share of schools by nation

Found in Northern Ireland. Controlled schools are managed by Boards of Governors (BoGs), and the employing authority is the education authority. Maintained schools are managed by the BoG, but the employing authority is the Council for Catholic Maintained Schools (CCMS). A small number of grant-aided integrated schools and Irish-medium schools exist.

How does this affect engagement?

- Similar to community schools

Free schools

1%



Indicative share of schools by nation

England only. Funded by the government but not run by the local authority. Free schools are not-for-profit organisations and don't have to follow the national curriculum.

How does this affect engagement?

- More freedom and flexibility in the curriculum and timetable than community schools

Foundation schools

3%



0.3%



Indicative share of schools by nation

Found in England and Wales. Foundation schools are maintained by the local authority and set their own admission criteria.

How does this affect engagement?

- Similar to community schools

Academies

Conversion 14%

Sponsored 6%



Indicative share of schools by nation

England only. Independent state schools receiving funding directly from the government. Often form part of a multi-academy trust (MAT). Academies don't have to follow the national curriculum. Converter academies are those previously with 'good' or 'outstanding' Ofsted grades that have converted to academy status. Sponsored academies are mostly underperforming schools converting to academy status and run by sponsors.

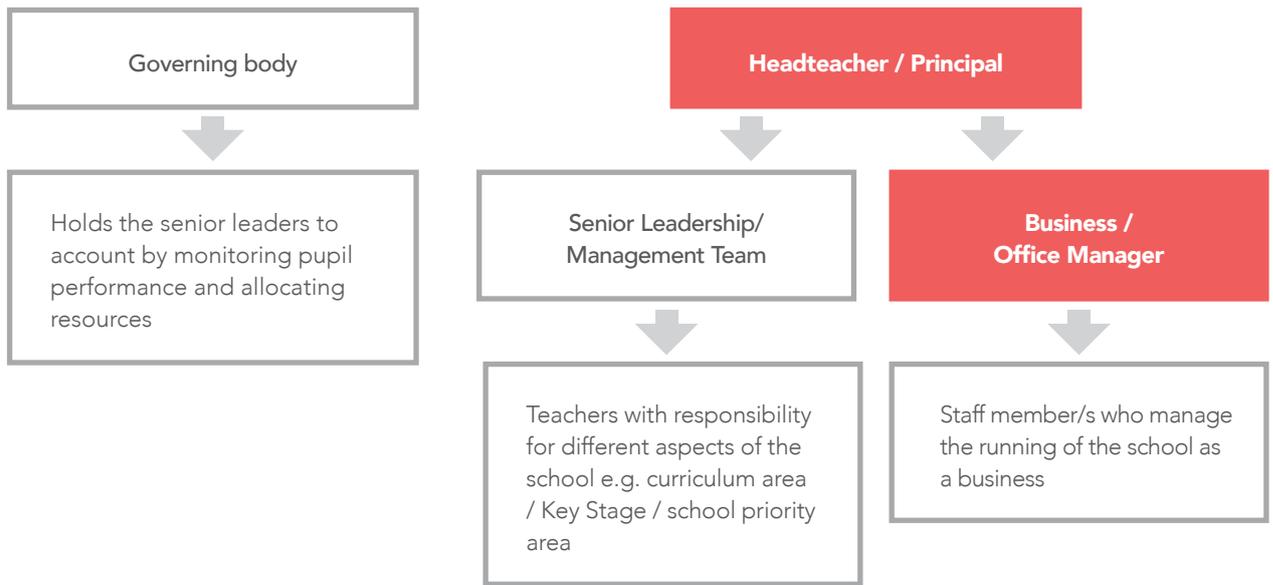
How does this affect engagement?

- Sponsor-led academies are often set up in areas of deprivation and potentially require support in all three areas of need
- More freedom and flexibility in the curriculum and timetable than community schools
- Some academies run by MATs are managed like a business, benefiting from economies of scale and influence

Who should I contact?

It is important to know who to get in touch with when making initial contact with a primary school. Engagement and sign-off authority is centralised in most primary schools, with the senior leadership/management team (SLT/SMT) supporting the headteacher in the day-to-day running of the school, and the governing body holding them all to account.

There may not be a member of staff with particular responsibility for business partnerships, and the headteacher or business/office manager will therefore often be the best person to approach.



What do pupils learn?

Your business may choose to support schools by enhancing the curriculum. Bear in mind that the curriculum differs in each nation and according to the type of school. However, the following subject areas are covered by all primary schools.

(NB: different nations use different titles for some of these subjects)

Art and Design; Computing; Design and Technology; Geography; History; Literacy; Mathematics; Modern Foreign Language (one minimum) ; Music; Personal, Social and Health Education; Physical Education; Religious Education (pupils can opt out); Science

Toolkit 2 provides top tips for establishing contact with primary schools.

What age groups might you support?

The terminology used for primary year groups also differs by nation. The table below will help you identify the age of the pupils you might support.

Variances in school structure across the UK:



England



**Northern
Ireland**



Scotland



Wales

Key Stage 1 (KS1)

Years 1 – 2 (Infants)
Aged 5 to 7 years

Key Stage 2 (KS2)

Years 3 – 6 (Juniors)
Aged 7 to 11 years

Key Stage 1 (KS1)

Years 2 – 4
Aged 6 to 8 years

Key Stage 2 (KS2)

Years 5 – 7
Aged 8 to 11 years

First Level

P2 – P4
Aged 6 to 8 years

Second Level

P5 – P7
Aged 9 to 11 years

Foundation Phase

Years 1 – 2 (Infants)
Aged 3 to 7 years

Key Stage 2 (KS2)

Years 3 – 6 (Juniors)
Aged 7 to 11 years

Why parental involvement is helpful

Parents are key stakeholders in primary schools, and successful parental involvement has been shown to improve pupil outcomes.²² Schools are often supported by strong Parent Teacher Associations (PTAs), which help build the school's ethos and

community. By planning engagement that involves parents and the wider community, your business can increase the impact of its involvement. See Toolkit 4 for examples of activities that can increase parental and community involvement.

How is a typical day structured?

A primary class is mostly taught by one teacher, who delivers lessons across all subjects (sometimes with support in areas such as PE and music). This allows for more timetable flexibility than at secondary level, making it easier for businesses and schools to work together. Pupils are usually based in one classroom for most of the day.

A typical day in the life of a primary school might look like this:

8:30-9:00am	Teacher preparation for the day/ staff meeting
9:00-10:30am	Pupils arrive for learning Lessons are broken into small chunks to deliver literacy, numeracy and other curriculum subjects
10:30-10:45am	Pupil break
10:45-12:15pm	Further curriculum sessions
12:15-1:15pm	Lunch
1:15-3:15pm	Further curriculum sessions, which could include subjects such as PE and music School day ends
3:15-4:00pm	Teacher preparation and assessment time/staff meetings

What about health and safety requirements?

Primary schools are experienced in meeting health and safety requirements for external visitors, and will manage the paperwork needed. Unless your business is visiting on a regular basis, the paperwork will be minimal and disclosure checks²³ may not be required. Importantly, your employees should never be left alone with pupils, and school staff should manage pupil behaviour.

If you are planning for pupils to visit your workplace, conduct a risk assessment to identify and minimise the risks and ensure your plans are appropriate for the age group you are working with.

You can find more health and safety guidance at:

- HSE Work experience guidance: www.hse.gov.uk/pubns/indg364.pdf
- Risk Toolkit: www.ivr.org.uk/images/stories/Institute-of-Volunteering-Research/Migrated-Resources/Documents/R/Risk_toolkit.pdf

Key considerations

When liaising with schools it is worth keeping in mind the following:

1. SENSITIVITY TO BRANDING

Many schools, particularly those in areas of high deprivation, are open to branded business involvement, and are happy to receive free vouchers and products. However, some schools express concern about direct advertising to children, so levels of branding should be discussed with the school or an education expert.

2. LEAD IN TIME FOR PLANNING IS ESSENTIAL

Like businesses, most primary schools like to plan at least a term, if not a year, in advance. The school year starts in September (or August in Scotland), and dates of the 3 terms will differ by location and type of school. The autumn, spring and summer terms are broken up by Christmas, Easter and the summer holidays.

3. LOCATION CAN BE A BARRIER

Schools in rural locations can find it difficult to engage with geographically distanced businesses, with funding for visits reduced through tightening budgets. Teachers in Northern Ireland felt overlooked by national companies for support or involvement.

4. TEACHERS ARE TIME POOR

Teachers tend to have numerous competing time pressures, resulting in them having limited time to dedicate to activities that fall outside school priority areas. Lack of time to source business contacts and build relationships can be a barrier.

5. ACTIVITIES NEED TO BE AGE APPROPRIATE

Working with pupils is very different to working with adult colleagues, and requires a different skill set. There are marked differences in the abilities of different age groups, which means activities must be tailored appropriately.

Using these considerations as a starting point, we have identified four examples of best practice to assist you when working with primary schools. Toolkit 1 provides guidance on establishing relationships with schools.





Best practice

What do these considerations mean in practice?

Plan in advance

- Plan activities collaboratively with schools well in advance, with regular communication before an activity

On school planning:

'Schools, set out a year plan at the start of term in September; whatever business is planning to partner with schools they have to fit into the year plan.'

Teacher Respondent

- Check term dates on the school website, or with key staff, to ensure planning is realistic. Avoid 'peaks' in the school timetable, such as the run-up to Christmas and key assessment/testing points such as the end of term/year (page 19)
- Avoid last-minute cancellations, as schools will have rearranged their timetables or plans in preparation – ensure employees are aware of the impact of potentially cancelling if you are undertaking a volunteering based activity

Work smart

- Agree communication methods and check that they work for you and the school
- Where possible, streamline processes to reduce workload for teachers

Reach out

- Funding for transport to your workplace, or using digital technology to remotely engage with schools, will increase opportunities for engagement and help you reach a wider audience

Tailor activities to your audience

- Ensure that your activities are age appropriate
- Make activities interactive and hands-on in order to capture pupils' interest and keep their attention
- Avoid prolonged periods of adults talking at pupils (15-20 mins max)
- Incorporate short tasks and group activities
- If you are creating your own activities, ensure you liaise with teachers or seek expert advice

On making activities age appropriate:

'They're not going to listen for an hour. Give them an activity, get them engaged with hands-on things.'

Teacher Respondent

'Anyone that comes in must understand how to pitch at pupils.'

Teacher Respondent



2 | Begin with school needs

Three main areas of need and advice on how to work with schools to identify specific needs



This Principle sets out core areas of need common to primary schools in the UK. Much of their activity being driven by wider education priorities set out by nation governments and school inspectorates. Statutory requirements, education policies, funding structures and inspectorate assessment criteria all heavily influence what schools prioritise. You can use these core areas of need as a starting point for a conversation with a school.

The individual needs of schools should also be taken into account, and potentially take precedence, to ensure your engagement is truly 'needs led' – a number of factors influence these, including geographical location and the specific characteristics of the school's population. You may also seek to prioritise a particular need as an area of focus.

Three areas of need

There are three main areas of need common to most primary schools across the UK, identified by the teachers questioned and existing literature.²⁴ School provision in response to these needs will be considered as part of school inspections.

These needs are not mutually exclusive and frequently cross over; for example, a school may wish to promote STEM curriculum subjects (science, technology, engineering and maths), and as part of this will also want to promote STEM careers. Working collaboratively with a school to identify their needs will help you prioritise areas where your business can help.

1

Raising attainment

- Improving academic performance
- Enriching and enhancing the curriculum

- Bringing 'real-world' relevance to curriculum topics
- Assisting with targeted interventions, e.g. guided reading with pupils to raise attainment
- Funding equipment that aids learning

Examples of popular topics for business engagement include food provenance and STEM (science, technology, engineering and maths)

How businesses help to raise attainment:

'Providing memorable experiences that support teaching and learning, it's a practical means for remembering.'

Teacher Respondent

2

Increasing social mobility

- Raising aspirations and breaking cycles of deprivation
- Building young people's employment prospects
- Addressing the perceived 'skills mismatch'

- Supporting the development of employability skills and raising awareness of job roles and careers
- Engaging pupils, parents and communities to increase aspirations
- Sharing labour market challenges to raise pupils' awareness of skills shortages and surpluses

Examples of popular topics for business engagement: careers education, enterprise and life skills

Raising aspirations and broadening employment prospects:

'Pupils have never thought: "How does this happen?" or "What do people do in an office or factory?" The children really love that context.'

Teacher Respondent

3

Support with school planning, management and professional development of teachers

- Narrowing the gap between school and the world of work
- Upskilling of school staff
- Supporting leadership and governance

- Transferring business and industry-specific knowledge to the classroom
- Offering business expertise via employee volunteers – sharing business knowledge and skills, e.g. to inform school improvement plans and budgeting
- Offering HR expertise and developing future school leaders – creating staff development programmes, increasing retention and boosting recruitment

On supporting senior leaders in schools:

'Schools are essentially becoming a business, running budgets etc. To have strategic leadership on how to run a school would be great, to help with marketing, bid writing and aiding professional development.'

Teacher Respondent



Of these areas of need, raising attainment and increasing social mobility are most commonly mentioned by teachers as areas in which your business could add real value.

Schools are also increasingly requesting assistance with business management. Your business may have expertise that could support school leadership and governance, or provide training to upskill teachers.

How business engagement with primary can address need:

'Part of the curriculum in Scotland is getting children ready for work and life after work, and the best way you can do that is by getting businesses in to say "this is what we do", "you can work here", and "there is a wealth of opportunity out there".'

Teacher Respondent

'I think early intervention is essential, particularly in areas of deprivation with a lot of unemployment and poverty. I think it is important businesses do get involved with schools in the very earliest years of primary school.'

Teacher Respondent



Best practice

Discussion guide for identifying a school's needs

Use the discussion topics below when in initial conversation with a school, to identify how your business can best support its areas of need.

Suggested examples of engagement activities that support these needs can be found in Toolkit 4.

Does your school need support with...

1 Raising attainment

Prompt questions to ask the school:

1. How does your school perform against national attainment figures?
Do you face any challenges in this area?
2. Do any specific curriculum areas require support?
3. What provision do you have for extra-curricular opportunities?
4. Do you require literacy/numeracy support?
5. Do you face any wider issues?
e.g. health and wellbeing, SEN needs
6. To what extent are parents involved with the school?

2 Increasing social mobility

Prompt questions to ask the school:

1. Do you require access to inspirational role models?
2. What do you currently do to build employability skills, and do you face any challenges in this area?
3. Would you be interested in a programme/challenge that builds enterprise skills?
4. Do you require support with local job market/skills shortage information?
5. Do you require sector-specific career pathway information?
6. Does your school experience parental/family role model and aspiration challenges?

3 School management and professional development

Prompt questions to ask the school:

1. What is your school vision?
What are your specific areas for development?
2. What is staff recruitment and retention like in your school? Do you require any support in this area?
3. What are the CPD requirements of your staff?
4. Do you require skilled operational support?
e.g. IT, budget, marketing
5. What are your leadership/management/governance training needs?
6. What are the gaps in staff training and development?



3 | Identify what your business can offer

A four-step planning tool to help you identify the best approach to engagement for your business



When planning any primary school engagement you need to be clear about what your business can offer. Whether you are seeking to set up a direct relationship with a school or join an established programme, it is important to work collaboratively with the school and be transparent about your business objectives.

Being clear on what your business can offer:

'Any business would make a good partner, as long as they are clear on what they want to do, with a plan and a realistic outcome, and are able to show sustainability.'

Teacher Respondent

'A business needs to show transparency; to clearly state what they are getting out of the partnership.'

Teacher Respondent

Undertaking an assessment of your business objectives and available resources will help you identify what your business can offer. The tool below suggests key areas for your business to consider. A full planning tool can be found in Toolkit 1.

Planning tool

Step 1

Identify objectives and resources

Step 2

Explore potential depth of engagement

Step 3

Determine what expertise you can offer

Step 4

Select the type of engagement

Case study 1: Business-owned programme

Waitrose 'Grow and Sell'

Waitrose stores team up with local primary schools and provide 'Grow and Sell' kits containing seeds, equipment and growing instructions – everything needed to get school allotments and vegetable patches up and running. Schools can also download a special Grow and Sell app, which contains a wealth of information for children, parents and teachers about how crops are farmed and the importance of the environment and seasonality.

Case study 2: Ongoing engagement, Direct relationship

Pinsent Masons and St Matthew's Primary School, Birmingham

Pinsent Masons' partnership with St Matthew's Primary School in Birmingham has helped raise academic standards and improve children's confidence, while supporting staff training and development. The school identifies children who need additional support, and Pinsent Masons' volunteers offer one-to-one mentoring each week to deliver the firm's literacy support programme, Right to Read, and numeracy programme, Maths Buddies. Through volunteering, staff develop new skills and enhance existing skills such as communication and teamwork.

Case study 3: Employer expertise, Established programme

Enabling Enterprise

Enabling Enterprise works with schools to boost students' enterprise skills, including resilience and empathy, from Reception. Students take part in weekly enterprise lessons delivered by their teachers in school following the Enabling Enterprise curriculum, and then apply their skills on trips to more than 110 business partners across England, including PwC, UBS, London City Airport and many more. More than 230 schools now take part, and 96% of teachers see the skills of their students boosted by the scheme.



4 | Build effective relationships

Six key characteristics that are crucial to forming effective relationships with primary schools



Our research highlighted six key characteristics that will help your business form successful, effective relationships with primary schools.

On what makes an effective relationship:

'A successful relationship is something that is mutually beneficial, has good consistency and frequent communication.'

Teacher Respondent

Relationships are most effective when they are:

Mutually beneficial

Proposed engagement meets both school and business objectives

Committed

Senior 'buy-in' from both business and school, with named key contacts

Transparent

Both parties are clear on roles and responsibilities, and have a clear vision of what they want to achieve

Collaborative

Time is given to build relationships and work together to identify and address needs

Realistic

Commitment of time and resources is based on achievable objectives

Impactful

Objectives are measurable and evaluation is planned to show impact



5 | Evaluate the impact

Key considerations for evaluation, to ensure that your engagement makes a positive impact and has measurable outcomes



Why evaluate?

Regular evaluation of activities and the business/school relationship against objectives will ensure the support you provide is beneficial for pupils, the school, your employee volunteers (if relevant) and business.

Piloting schemes and using feedback loop models will enable you to develop your engagement effectively and ensure you generate a positive, measurable impact.



How can you evaluate?

Effective evaluation of primary school engagement uses KPIs that measure SMART (Specific, Measurable, Agreed upon, Realistic and Time-related) objectives. The KPIs you select will vary depending on the types of engagement that your business supports.

KPIs often attempt to measure the social and/or business impact, that an engagement provides. However, it is important to be clear with internal business stakeholders and schools about the difference between inputs, outputs and impacts, and which you are seeking to measure.

Inputs provide information on the contribution made, e.g. volunteer numbers and hours. **Outputs** quantify who benefited, usually in numerical form e.g. the number of pupils reached. **Impacts** are what changed, often requiring measurement of the long-term or indirect effects of your engagements. Not all impacts of engagement activity are easily measurable, such as the development of 'softer skills', and greater resources are required to meet the challenge of demonstrating the causal link between your engagement and an increase in, for example, attainment levels.

However, the advantage of forming a longer-term relationship is that you are able to measure distance travelled, i.e. impact over time, in order to demonstrate sustainable change.

Tools such as the London Benchmarking Group (LBG) measurement model²⁵ and BITC's Corporate Responsibility Index,²⁶ among others, can be used to measure the impact of your primary school engagement.

KPIs measured by businesses may include:

- number of activities delivered
- number of pupils directly reached or supported
- number of employee volunteers/hours volunteered
- media coverage
- awareness among customers or employees
- Community impacts:
 - depth or types of impact on people, e.g. connection/improvement made
- Business impacts:
 - on employee skills/wellbeing/ behaviour
 - increased brand awareness/HR benefits
 - more clients reached/increased profile

KPIs measured by schools may include:

- % of 'FSM/IDACI' pupils reached
- number of parents engaged
- increase in pupils reaching a target/attainment e.g. reading/writing
- improvement in attainment of particular groups, e.g. white British boys, Pupil Premium
- increase in pupils' confidence in a particular skill, e.g. communication
- pupil progress in meeting learning objectives

Feedback from young people:

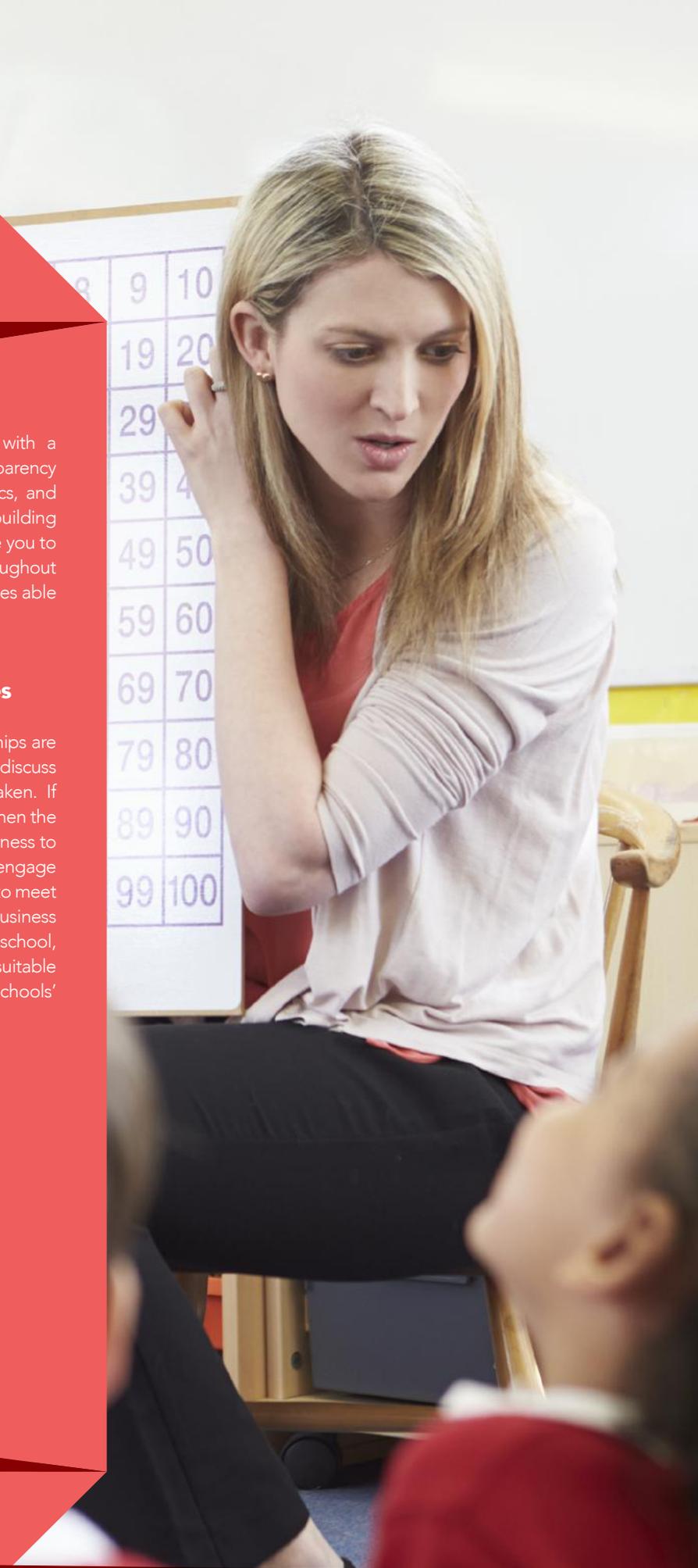
'Talking to pupils and getting their feedback is always most important.'

Teacher Respondent

If your business is engaging directly with a school, close liaison will help ensure transparency around your objectives, KPIs and metrics, and those of the school. Spending time building relationships with schools will also enable you to carry out more informal evaluation throughout the engagement process, with both parties able to make changes where required.

When evaluation highlights relationship/outcome challenges

When evaluation indicates that relationships are not achieving the desired outcomes, discuss with the school what action can be taken. If solutions are not suitable or achievable, then the best course of action may be for the business to step back. This will enable the school to engage with other businesses that are more able to meet their needs. This will also enable the business to start a new relationship with another school, where the business offer may be more suitable and/or it can better respond to the schools' needs.





Best practice

Steps for evaluating and measuring impact

The following steps will guide you through the process of evaluating and measuring the impact of your engagement with primary schools.²⁷

Further information and guidance on embedding evaluation into school engagement programmes can be found here:

Research Councils Public Engagement guidelines

www.snf.ch/SiteCollectionDocuments/agora_evaluationguide.pdf

Step	Action	What might this look like?
Step 1	Action	What might this look like?
Set engagement objectives	Work with the school to set SMART objectives for the engagement that meets your needs	For example: <ul style="list-style-type: none">• pupils will become more confident communicators
Step 2	Action	What might this look like?
Decide which KPIs you will measure	Agree which KPIs you will use to measure the outputs, outcomes and impact. Your business and the school may use different KPIs for reporting	For example: <ul style="list-style-type: none">• number of FSM pupils reached• number of volunteers engaged• increased confidence levels in communication skills
Step 3	Action	What might this look like?
Determine the inputs	Ensure the planned engagement is feasible by working out resources needed to deliver it, e.g. volunteers, finances	For example: <ul style="list-style-type: none">• five volunteers for four hours• prizes donated by business• activity resources provided by school
Step 4	Action	What might this look like?
Plan the activities and evaluation methods	Plan collaboratively with the school/experts where possible to ensure activities are appropriate for the primary audience. Build evaluation methods, such as pre- and post-questionnaires, and key points, into your plan from the start	For example: <ul style="list-style-type: none">• business to pose enterprise challenge and provide volunteers• teachers to plan activity• pupils to complete pre- and post-evaluation questionnaire• volunteers/teachers to complete post-evaluation questionnaire• case study written for website



Best practice

Step 5

Assess the **outputs**

Action

Consider the short-term outputs, such as the number of pupils directly reached by the activity

What might this look like?

For example:

- 35 pupils in Year 4 completed an enterprise activity with a local business

Step 6

Evaluate the **outcomes**

Action

Evaluate the medium-term consequences – how the engagement has met the objectives set at the start

What might this look like?

For example:

- 85% of pupils felt their communication skills had improved after completing the enterprise activity

Step 7

Measure the **impact**

Action

Identify what has changed and draw out the long-term consequences (you may find that it is hard to attribute these just to the engagement activity)

What might this look like?

For example:

- Business engagement increased pupils' employability skills, such as communication

Step 8

Take next steps

Action

Following the results of the evaluation work with the school to decide what steps, if any, you should take next

What might this look like?

For example:

- Build in more opportunities to develop employability skills

Implementation Framework

Now that you are familiar with the five principles of primary engagement, it's time to get started. Consider the potential impact offered by different types of engagement outlined in the diagram on page 12 and use this simple framework to guide you through the next steps.



Planning tool

Use this planning tool to help you establish which approaches to engagement are right for your business.

Step 1

Identify objectives and resources

What is your business seeking to gain from the partnership and what resources are you able to invest?

Alignment with business objectives

How does primary school engagement fit into your employee, community engagement, brand, corporate and recruitment objectives?

Resource and budget availability

What resources and budget are available?

How could they be allocated?

A clear vision of success

What benefits do you hope to gain from engaging with primary schools?

What will success look like?

Measurable impact

How will you measure the impact of your interactions?

How could you share the outcomes with the wider community?

Step 2

Explore potential depth of engagement

What depth of engagement are you able to offer?

What depth of engagement is your business able to offer, e.g. one-off contact, intensive period of time, or ongoing relationship?

How much time/resource/budget are you able to put into your primary school engagement programme?

Consider the costs and benefits of volunteering in schools compared to other activities. How much time can your business commit?

Step 3

Determine what expertise you can offer

What expertise can your business offer?

These questions are designed to help you develop your initial ideas. If you're building a direct relationship with a school, talk to staff about how they could best use your expertise.

Are there any areas of need your business could help address?

- Raising attainment
- Increasing social mobility
- School management and professional development

Link to governance guidance:
www.gov.uk/government/uploads/system/uploads/attachment_data/file/481147/Governance_handbook_November_2015.pdf

Are there any curriculum or school priority areas that your business has expertise in or has worked with in the past?

Refer to information in principles 1 and 2

Are there any 'hands-on' learning opportunities your business could provide to inspire and excite pupils?

What skills do you feel you could help to develop in young people?

Skilled volunteering is an increasingly popular way for businesses to support schools and build relationships, as it showcases the 'human side' of your business. Your business should consider carefully the cost and time efficiency of

volunteering, sharing potential benefits with volunteers to increase participation. Briefing your employee volunteers on what to expect before an engagement activity will maximise their experience and create the most impact.

Step 4

Select the type of engagement

Which type of engagement is most appropriate for your business?

Direct relationship

Setting up a direct relationship with a school or multi-academy trust

e.g. Pinsent Masons and St Matthew's Primary School, Birmingham

Established programme

Joining an established engagement programme run by a broker organisation (see Toolkit 3 for examples)

e.g. Enabling Enterprise workshops, Beanstalk literacy programme, Born to Read

Business-owned programme

Developing a company-led programme that would be available to a large number of schools

e.g. Waitrose Grow and Sell

Further examples of successful business engagement can be found at: www.bitc.org.uk/issues/education/education-case-studies

Top tips for establishing contact with primary schools

- ✓ Identify a school – including on the basis of geography* (e.g. a school that meets these criteria and is close to your office), through an employee contact or using a database such as Edubase (www.education.gov.uk/edubase).
- ✓ Explore the school's website to find out what businesses it might already be partnering with.
- ✓ Ask the school office to direct you to the appropriate member of staff in charge of 'business relationships/ employer engagement', which may be the headteacher or business/office manager. If you're unable to make contact with the right person, consider using a broker organisation to help you connect with the school.
- ✓ Emails should contain a clear explanation of who you are, why your business wants to engage with the school, what you have to offer and how to contact you. State clearly in the subject line that this is a support opportunity, to help your email stand out in a crowded inbox.
- ✓ Share key business contact details with the school, such as name, job title, email address and phone number.
- ✓ Once you have received a response, agree the best method of communication with the lead teacher. Be aware of school timings – teachers won't be able to call when they're teaching and are unlikely to be available during the school holidays, so check term dates on the school website. Agree what the next steps should be.
- ✓ Avoid jargon and clarify understanding and expectations – and ask schools to do the same.



Examples of business/school brokers and school leader development organisations

If you are planning on joining an established programme, the following brokerage services can help to match your business or individual employees with schools. Examples of brokerage services include:

- Primary Futures: www.inspiringthefuture.org/primary-futures/
- Inspiring Governors: www.inspiringgovernance.org/
- Local Chambers of Commerce: www.britishchambers.org.uk/find-your-chamber/
- Education Business Partnerships (EBPs): www.ebpnational.org.uk/
- Careers Wales: www.careerswales.com/employers
- Our Skills Force Scotland: www.ourskillsforce.co.uk/
- Young Enterprise: www.young-enterprise.org.uk/
- Business in the Community: www.bitc.org.uk/
- Enabling Enterprise: www.enablingenterprise.org/
- Transformation Trust: www.transformationtrust.org.uk/about/what-we-do#
- The Brokerage: www.thebrokerage.org.uk/
- Job Junction: www.thejobjunction.co.uk/

Examples of school leadership development and CPD organisations:

- Teach First: www.teachfirst.org.uk/
- Teaching Leaders and Future Leaders: www.teachingleaders.org.uk/, www.future-leaders.org.uk/
- The Key: www.schoolleaders.thekeysupport.com/
- The College of Teaching: www.collegeofteaching.ac.uk/
- SSAT: www.ssatuk.co.uk/
- PiXL: www.pixl.org.uk/primary



Explore what works for you both

With so many possible ways for businesses to work with primary schools, you may find it challenging to identify which types of activities will be best for your business. The examples in this section will help you explore what could work for your business and inspire both colleagues and pupils.

Below each idea we have identified whether it is most commonly delivered as part of a direct relationship, established programme or business-owned programme. We have also identified whether it is most likely to require business expertise, subject expertise or employer expertise.

We have focused on the most common means of delivery in each case. However, you can of course choose to deliver each idea in many different ways, e.g. your business could create a business-owned programme to support all schools with school governance.

Further examples of successful engagement with primary schools can found in 'Primary Futures: A guide for primary school leaders on working with employers and volunteers',²⁸ along with other useful resources for planning activities.²⁹

On the range of engagement activities:

'The most effective support is in activity-based learning and mentoring.'

Teacher Respondent

Primary school areas of need

Raising attainment		Increasing social mobility		School planning, management and professional development	
Mentoring able and talented pupils		Supporting disengaged pupils through a mentoring programme		Taking up an appointment as a governor and using legal knowledge to support the school's HR needs	
EE, DR/EP/BOP		EE, EP		BE, DR	
Participating in a literacy programme		Visiting schools regularly to give pupils the opportunity to engage with real-life employees		Providing labour market insights to support planning	
EE, EP		EE, DR/EP/BOP		BE/EE, DR	
Organising a 'world of work' week – a series of activities where employees demonstrate aspects of their job. Pupils then carry out a follow-up visit to the workplace and write a blog for the school website		Running a skills programme of activities designed to develop employability skills such as communication or teamwork		Using IT specialism to train IT teachers in coding	
EE, DR/EP/BOP		SE/EE, DR/EP/BOP		BE/SE, DR/EP/BOP	
Funding resources and providing volunteers for a 'bird box' creation challenge, including a prize		Delivering a parent-focused evening class aimed at improving employability or literacy/financial skills		Helping a school to develop its website and marketing materials	
BE/SE, DR		BE/EE, DR/BOP		BE, DR/BOP	

Level of commitment

Key:

BE – Business expertise SE – Subject expertise EE – Employer expertise DR – Direct relationship EP – Established programme BOP – Business-owned programme

Primary school areas of need

	Raising attainment	Increasing social mobility	School planning, management and professional development
Level of commitment 'One off'	Supporting pupils in marketing a product during a design and technology lesson SE, DR/BOP	Running a 'find someone who' game that gives pupils the opportunity to talk to employers and find answers EE, DR/EP/BOP	Running a photography masterclass EE, DR/BOP
	Donating and building an outdoor play area BE, DR	Sharing career pathways to inspire and motivate pupils EE, DR/EP/BOP	Providing business mentoring support for SLT BE, DR/BOP

Key:

BE – Business expertise SE – Subject expertise EE – Employer expertise DR – Direct relationship EP – Established programme BOP – Business-owned programme

Further case studies of business initiatives in primary schools can be found here:

BITC: www.bitc.org.uk/issues/education/education-case-studies

Endnotes

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