

## Pearson's commitment to efficacy

In November 2013, Pearson announced a new commitment to report on learning outcomes across its product portfolio from 2018. This new and transparent approach to efficacy is central to our purpose to help people make progress in their lives through learning.

We want Pearson's customers to be confident that working with us will help them to achieve their long-term learning goals and enable them to make progress in their lives.

In November 2013, Pearson announced a new commitment to report on learning outcomes across its product portfolio from 2018. We also published *The Incomplete Guide to Delivering Learning Outcomes*, sharing the actions we have taken over the last two years to prepare our company to meet this unique challenge and demonstrate the efficacy of our products.

This new and transparent approach to efficacy is central to our purpose and also makes good business sense. We hope that by demonstrating the evidence base that supports our products we will encourage a deeper engagement with learning outcomes across the education sector and at the same time clearly demonstrate the benefits of using those products.

We are now defining the practical approach that we will take to reporting publicly on learning outcomes in 2018, and how we will demonstrate and report on our progress along the 'Path to Efficacy'.

Below, we summarise our work to date and share our priorities for 2014. Our approach will continue to be refined in the coming years as we work towards our goal, and we will consult upon it within and outside of Pearson through 2014 and beyond. Our vision is that by 2018, we will report on learning outcomes alongside our financial results.

We welcome comments, feedback and support as we take our next steps. Please email our senior vice-president of efficacy, Saad Rizvi [saad.rizvi@pearson.com](mailto:saad.rizvi@pearson.com) with any questions or comments that you may have.

### Pearson's Efficacy Framework and Review Process

Pearson has developed an Efficacy Framework to support our product development and management teams to define measurable learning outcomes for Pearson products and services, and progressively to improve the likelihood of achieving them.

The Framework is a tool of systematic discovery that helps us to ask key questions about our solutions, and evaluate the likelihood that they will deliver their intended learner outcomes.

A standardised Efficacy Review process accompanies the Framework to ensure its wide and consistent use across the organisation. More detail on the Framework, review process and scoring system can be found at [efficacy.pearson.com](http://efficacy.pearson.com)

THE EFFICACY FRAMEWORK

CRITERIA AREA	RATING	RATIONALE SUMMARY
<b>OUTCOMES</b>		
Intended outcomes		
Overall design		
Value for money		
<b>EVIDENCE</b>		
Comprehensiveness of evidence		
Quality of evidence		
Application of evidence		
<b>PLANNING AND IMPLEMENTATION</b>		
Action plan		
Governance		
Monitoring and reporting		
<b>CAPACITY TO DELIVER</b>		
Pearson capacity and culture		
Customer capacity and culture		
Stakeholder relationships		

How it works

Using this Framework we assess the potential efficacy of a product or programme against 12 criteria. By giving each criteria a rating on the four point scale (green to red) we gauge the likely overall effectiveness of a product. The Framework serves to identify specific areas which, if improved, will increase our likelihood of intended impact. Teams are able focus their activity on taking these steps before the product is assessed again.

- KEY**
- Green:** Requires small number of minor actions.
  - Amber/green:** Requires some actions (some urgent and some non-urgent).
  - Amber/red:** Requires large number of urgent actions.
  - Red:** Highly problematic requiring substantial number of urgent actions.

EMBEDDING THE EFFICACY FRAMEWORK

Our progress

- › In 2012, we began using the Efficacy Framework to review all investments above \$3m in value, and in 2014 all investments above \$1m will undergo a review. Products and programmes are repeatedly reviewed over time to ensure progress and improvements are being made.
- › Pearson acquisition opportunities are reviewed using the Framework to evaluate the opportunity to improve learning outcomes through Pearson ownership.
- › We will now focus on securing the consistency with which the Framework is applied by clarifying our definitions and expectations of research, efficacy and quality standards.

Key statistics at year end 2013

**123** Reviews completed, including nine potential acquisitions and 14 internal functions

**33%** Showed progress in repeat reviews

Our plans in 2014

- › A standardised Pearson Product Lifecycle will be introduced, ensuring that the principles which support greater efficacy are embedded consistently in all new product investments.
- › We will increase the number of repeat Reviews on single products, and increase the percentage of products showing an improved score between Reviews.
- › Pearson's Lines of Business and Geographies will be reviewed against Key Performance Indicators which address the implementation of Pearson's Efficacy Framework and Review processes.
- › At least 40 of our top products will have in place the detailed targets, measures and systems necessary to track learner outcomes over time.
- › All new product developments will have defined and measurable learner outcomes.
- › We will have at least three products which are already in a position to report on learning outcomes, covering the range of learner ages and stages.

## Pearson's commitment to efficacy continued

### Towards reporting on outcomes

The Efficacy Framework and Review process ensures that all Pearson products and programmes address the factors that could affect the learning outcomes that they are ultimately able to produce, in a consistent way.

Scores on the Framework do not in themselves represent evidence of impact. Pearson's ultimate goal is to produce evidence of impact against defined learning outcomes for all of our products.

Evidence will take a variety of forms depending on where a product is within its lifecycle. Efficacy evidence tends to be a longitudinal measure requiring multiple measurements over the lifecycle of a product. The standard of evidence that is available will vary by product according to the specific learning outcome targets for that product and its maturity.

We anticipate therefore, that the nature of evidence will vary by product and time. We will be transparent about the standard for each of our products.

#### TOWARDS REPORTING OUTCOMES

##### Our plans in 2014

- › We will investigate and consult on how best to define our evidence standards, working with an independent partner.
- › We will complete and share efficacy studies that demonstrate learner outcomes for several product categories.

##### As we move towards 2018

- › We will be able to make available increasing detail about the standard of evidence that exists for each of our products, in support of its stated intended outcome, and the estimated number of learners reached by that product. Our goal is to continually improve the standard of evidence available.
- › Executives will be measured on learner outcome-oriented KPIs, including the quality of evidence available across their product portfolios, along with financial returns.
- › KPIs will be updated and refined to include targets which capture Pearson's aggregated impact on agreed learning outcomes. Areas addressed may include academic quality, employability, learner progression, access or affordability.

### Improving outcomes, in partnership

By using the Efficacy Framework and committing to high standards of evidence, we will be better able to anticipate and mitigate potential challenges to our products' efficacy, and to report back clear evidence as to their success in improving defined learning outcomes.

We are acutely aware that our efficacy challenge is not one we can meet alone. We rely on guidance, support and insights of our colleagues and partners across the education community. We see a significant opportunity to work in collaboration to debate and address the broad educational research questions that will inform and improve our contribution to learning worldwide, and drive continuous improvement across education.

As part of our commitment to efficacy in November, we brought together experts from inside and outside of education to share their perspectives on the opportunity ahead to improve learning outcomes globally through the paper *Asking More: The Path to Efficacy*. We also began a series of public engagements on the topic of efficacy, bringing together experts in dedicated events at the National Institute of Education in Singapore, and the MIT Media Lab in Boston. We also discussed the challenges around efficacy at important global events such as the Education World Forum in London and the World Economic Forum in Davos.

## PROGRESS IN 2013–14

**An Avalanche is Coming**

Sir Michael Barber, Saad Rizvi, Katelyn Donnelly: published with think tank IPPR, this report explores the challenges and opportunities for higher education in an age of MOOCs, lifelong learning and students as consumers.

[www.ippr.org/publication/55/10432/an-avalanche-is-coming-higher-education-and-the-revolution-ahead](http://www.ippr.org/publication/55/10432/an-avalanche-is-coming-higher-education-and-the-revolution-ahead)

**Learning Metrics Task Force**

Pearson co-chaired this Brookings Foundation initiative which sought input from more than 1,700 individuals in 118 countries to make a series of recommendations on improving learning opportunities and outcomes for children and young people worldwide.

[www.brookings.edu/research/reports/2013/09/learning-metrics-task-force-universal-learning](http://www.brookings.edu/research/reports/2013/09/learning-metrics-task-force-universal-learning)

**A Rich Seam: How New Pedagogies Find Deep Learning**

Published in partnership with ITSE, MaRS Discovery District and Nesta, Professor Michael Fullan and Maria Langworthy's report asks how technology in schools is changing the student-teacher relationship.

[research.pearson.com](http://research.pearson.com)

**Alive in the Swamp**

Professor Michael Fullan, Katelyn Donnelly: published with Nesta, this report addresses the impact of digital innovation in education.

[www.nesta.org.uk/publications/alive-swamp-assessing-digital-innovations-education](http://www.nesta.org.uk/publications/alive-swamp-assessing-digital-innovations-education)

**Asking More: The Path to Efficacy**

This pamphlet shares insights from some of the world's leading education practitioners and business people to highlight the urgent need for a global focus on outcomes in education.

[efficacy.pearson.com](http://efficacy.pearson.com)



We will continue and extend this programme of research, dialogue and engagement in 2014 and 2015, working with partners to pursue and share research outputs around eight key questions which we believe will shape the effectiveness of education in the future, through our new Global Research Function. This includes exploring educator quality and pedagogy, system reform and the future role of learning technologies and learning science in improving outcomes.

Our research is now shared at [research.pearson.com](http://research.pearson.com)