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09 02 09

Dear Jim


'Happy birthday to you'; but not if it's summertime.
Birthdate effects: a review of literature from 1990 onwards
Liz Sykes PhD, John Bell and Carmen Vidal Rodeiro PhD
Cambridge Assessment

Please find the enclosed literature review, which contains a very new take on birthdate research and may make a significant contribution to your review.

For years, evidence of a birthdate effect has stared out of qualifications data; summer-born children appear to be strongly disadvantaged. Whilst those responsible for working on these data have, through mounting concern, periodically tried to bring public attention to this very serious issue, it has been neglected by agencies central to education and training policy. Following a flurry of press interest during 2007 and 2008, it has – justifiably – become a key part of the recommendations which may flow from the Rose Enquiry of the primary curriculum.

The literature review presented here is very specific in focus: it is intended to advance our understanding of the extent and causes of the birthdate effect in the English education system. A number of hypotheses have been advanced for its cause – clarity in understanding this fully is a vital part of determining possible remedies. Although this review focuses on understanding the birthdate effect in England, it uses international comparisons as one means of throwing light on key factors.

A review of this kind offers far more than a simple rehearsal of the findings of a series of relevant studies. It allows us to understand the accumulation of evidence in respect of the birthdate effect and to discount certain explanations of why it occurs. Crucially, it allows us to gain a view across the whole of the education system – and this reveals two critical things. Firstly, that the birthdate effect persists throughout education and training. Secondly, that a strong selection effect may be in operation at all stages – that is, summer-borns are not progressing onto certain routes and into certain levels of education. This effect is not obvious from individual studies limited to specific phases of education. It explains why the summer-borns who get through to the highest level of education are doing well: it's vital to recognise that disproportionately fewer summer-borns actually get to this level *at all*.

 UNIVERSITY of CAMBRIDGE
Local Examinations Syndicate

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Although we believe that the existing research is illuminating in respect of the extent of the birthdate effect and of its causes, we do not advance recommendations in respect of remedies. We believe that work on remedies is not yet sufficiently advanced; substantial, urgent work is required on the means of devising adequate approaches. From this review, and from the work of comprehensive reviews of the quality of primary and early years education, it is likely that adequate remedy will lie in not only development of a strategy regarding *when* formal schooling should start, but also – at least – in respect of: specific balance in respect of curriculum elements devoted to cognitive, emotional and social development; the training requirements of teaching and support staff; curriculum frameworks; inspection foci; pupil grouping strategy; management of differentiation; and the articulation between early years units and compulsory schooling.

'What's going on?' in respect of the birthdate effect has now been subject to extensive scrutiny; the weight of evidence suggests that it is indeed a serious issue. We hope that this review is a key contribution to understanding. However, possible *remedies* need equally expansive examination – leaping into inadequately-researched responses could exacerbate rather than remedy this problem within our system.

If you would like to contact me regarding the method, content or conclusions of this work, please feel free to get in touch with me at Cambridge.

Best wishes.

A handwritten signature in black ink, appearing to read 'Tim Oates', written over a horizontal line.

Tim Oates
Cambridge
February 2009