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**A study on the frequency and efficacy of formative versus summative approaches for future planning/teaching**

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## **Introduction**

The research project is a case study which employed mixed methods to address the efficacy and frequency of formative versus summative assessment on future planning and teaching.

This study aims to assess which type of assessment had more of an impact on planning and teaching in the future, looking at specific practices in both formative and summative assessment. The research and policy in the area of assessment is abundant, however this research focuses on if the literature findings apply in practice in the classroom. There is also much debate among educators and researchers as to which type of assessment is more impactful on how future planning can aid pupil progress, and this research aims to delve into some of these debates and investigate why there is such dispute.

To address the focus of this study, this paper will examine current literature in the area, and how this applies in the classroom while taking into account the methods and data collection that was used. The research will explore how effectively and frequently both summative and formative assessment are used and how this subsequently impacts future planning and teaching (including the impact on pupil progress). The findings of this study shed light on which type of assessment may be more effective in practice for forward planning and pupil support.

## **Literature review**

Assessment in primary schools has been a topic of interest for many researchers over recent years (Monteiro, Mata and Santos, 2021; Black and Wiliam, 1998) and there is debate as to which type of assessment is the best for informing educators' future planning and teaching (Bhat and Bhat, 2019).

The Teachers' Standards (DfE, 2011) states that teachers must 'adapt teaching to respond to the strengths and needs of all pupils' and 'make accurate and productive use of assessment' (pp. 9-10). This emphasises how important assessment and being adaptable are in the classroom, which stresses why research needs to take place in this area, as assessment is a key part of teaching.

This literature review aims to consolidate and synthesise existing research, broken down into formative and summative assessment, and how these inform teachers' future planning for students, and in turn, how this affects pupil progress. While acknowledging that formative and summative assessment are more of a spectrum than two separate categories (Kibble, 2017), with assessments often using and blending elements of both, this study, due to time constraints, has treated them as distinct and separate whilst investigating specific practices within each.

### **Formative assessment**

A strong consensus appears to exist among researchers regarding how to define formative assessment. It can be defined as practices which actively involve both students and teachers in gathering evidence of student learning in the moment, with the goal of using it for future teaching and learning (Heritage, 2021; Carnegie Mellon University, 2019; Brown, 2017; DfE, 2015; Clarke, 2012; Otero, 2006; Bloom, 1969). Given the diverse array of practices encompassed by this type of assessment, it is important for this study to make clear its specific focus. The breadth of formative assessment means it would be difficult to investigate all practices within this type of assessment (Heritage, 2007). The core elements of formative assessment under scrutiny within this study are live marking- which is a method of giving feedback to a student while they are still completing the work (Prospero, 2023), the interactive dynamic of the classroom (circulating and questioning students) and brief feedback

signals (for example, thumbs up/down). This research will look at how beneficial formative assessment is for classroom practice and planning.

In recent years, formative assessment has been favoured by educators in the classroom and used more frequently due to the high number of researchers claiming it is an effective practice to improve students' outcomes and aid in planning. The seminal work of Black and Wiliam (1998) extensively investigated this area and claims that pupil outcomes improve by nearly double when formative assessment is used over summative end-of-year tests, demonstrating why teachers often prefer and use this assessment type more frequently. Although this finding is from an earlier date and makes a strong claim, the meta-analysis means that there is a large amount of evidence to support their claims, and more recent studies (Pramesti, 2023; Grozdev and Kirilova, 2015; Bakula, 2010) offer further evidence, explaining that formative assessment allows teachers to understand the needs of their students better, allowing them to promptly plan future lessons or interventions where needed which then allows for greater learning and development. Black and Wiliam (2018) also revisited and strengthened their research in a later publication, still with the belief that formative assessment is a useful tool in the classroom which teachers can use day-to-day to meet their student's needs, further increasing the validity of this argument as similar views have been prevalent over several years.

High-quality feedback is a key reason why formative assessment can be useful in the classroom (Anders et al., 2022; Nicol and Macfarlane-Dick, 2006; Sadler, 1998). The ability to give feedback in the moment means that the teacher does not have to wait until marking work to realise that there is a misconception after the students have already moved on with their learning or went home and can intervene immediately. It allows the student to implement their feedback while the work is fresh in their minds

(Lui and Andrade, 2022), showcasing the efficacy and dynamic nature of formative assessment for planning and adapting immediately, which then allows pupils to progress more as they receive their feedback and support instantly.

Whilst this is extremely useful, formative assessment does have its drawbacks. A key challenge highlighted by Bennett (2011) illustrates that often the definition of formative assessment is too vague to describe a set of specific practices, meaning there are often differing effects as implementations can vary (Anders et al., 2022; Kluger and DeNisi, 1996). Bennett (2011) argues that a more concrete definition is needed in order to see the full benefits of formative assessment, which is why this study has chosen to focus on 3 specific areas of formative assessment to ensure a more focused investigation of its impact on planning within these defined parameters.

### **Summative assessment**

Summative assessment of students can be defined as 'a snapshot in time of their performance' (Mawby and Dunne, 2012, p. 139), allowing schools to evaluate how much a child has learnt at the end of a period of teaching (Bloom, 2024; Carnegie Mellon University, 2019; DfE, 2015). It is a summary of learning that can be reported to the necessary people, such as parents, school leadership teams, other teachers and school inspectors (Earle, 2014). Whilst researchers can agree on the definition, there is some debate as to how useful summative assessment is for learning. There are those who agree that it can be a good tool for teachers to plan future lessons and interventions and give meaningful feedback to students (Kibble, 2017; Black and Wiliam, 1998), yet others suggest it can have a harmful effect on students (Ismail et al., 2022; Newton, 2009) and is not a true reflection of what they have learnt (Cantley, 2023), making it more difficult for teachers to measure how much the students have understood. Although exhibiting a narrower scope than formative assessment, there is

still a range of practices that summative assessment covers (Mogboh and Okoye, 2019). For the purpose of this study, end-of-topic tests, assessment tracker sheets (appendix 1) and weekly reflections on planning (appendix 2) have been the primary focus.

Summative assessment, whilst not used as often as formative, is still common practice in most primary schools (Van Orman, Gotch and Carbonneau, 2024; Harlen et al., 2002). In today's climate of high-stakes testing, teachers are continuously under significant pressure to ensure that their students achieve highly (Dixson and Worrell, 2016). In the UK, large amounts of pressure are placed on students, and subsequently teachers, to do well in large-scale summative assessments such as SATs and GCSEs (Quick, 2024), showing that summative assessment is still a significant tool in education. However, is it the most effective way to assess students and inform planning?

Summative assessment is essential for evaluating student learning at the end of instructional periods (Adarkwah, 2021), so although it is not used as often as formative assessment, it can still be very effective in informing future planning and teaching (Adarkwah, 2021; McCarthy, 2017). It can guide teaching by identifying areas of strength and areas needing more support and it encourages more precise planning by promoting teachers to reflect on their practices (Black et al., 2011), which then promotes pupil progress as a result because it enables targeted interventions and adaptations to future lessons, ensuring teaching addresses individual needs and learning gaps, which ultimately enhances overall educational outcomes (Ishaq, Rana and Zin, 2020). Not only does it assess how much the students have learnt, but it also assesses the effectiveness of the curriculum, often leading to large-scale planning

changes and educational improvements, not simply the teachers' planning (Reddy, By and Reddy, 2019).

Despite this supporting research, in recent years, many teachers have found summative assessment less appealing as they often feel it does not give them enough insight into how much the students understand, meaning it is harder to know the best way to support their learning going forward (Harrison et al., 2017; Harrison et al., 2015). Earle (2018) acknowledges that summative assessment can be useful for tracking progress but argues that it is often limited in supporting day-to-day teaching and learning. This is because it can narrow the focus on the curriculum, meaning that it fails to provide actionable insights for teachers into student understanding. As Cantley (2023), Harlen (2007) and Black and Wiliam (1998) also suggest, summative assessments usually assess only a small part of learning, which provides feedback that may not be useful in informing future planning and teaching, because they focus on outcomes rather than the depth of student's understanding, making it difficult for teachers to use results to inform meaningful planning (Van Orman, Gotch and Carbonneau, 2024). Although Black and Wiliam's (1998) research is over two decades old, the continued alignment with more recent studies creates credibility and value. The longevity of agreement in the literature suggests that their findings are still relevant today.

One area this study focuses on is end-of-topic tests. Many teachers express concerns that this type of summative assessment can induce heightened levels of anxiety in students and reduce their intrinsic motivation, which can limit its effectiveness for planning (Ismail et al, 2022). The pressure that comes with high-stakes testing, such as SATs, for example, can often result in emotional distress for the students (Jerrim, 2024; Howard, 2020; Putwain and von der Embse, 2018; Cassady, 2004; Keogh et al.,

2004) especially younger students who have not yet learnt how to cope with this yet, which would be the case in this study as it takes place in a primary school. Robson et al. (2023) argue that this anxiety can significantly affect their performance by disrupting working memory and concentration, which can lead to them underperforming in tests. This performance, which has been impacted by other factors, is not a true representation of their understanding, complicating the teacher's ability to accurately interpret the results and plan future lessons effectively. Due to this, many teachers may avoid using summative assessment frequently and instead favour more responsive, low-pressure formative assessments, which could be less intimidating for the students, allowing better interpretation of what they understand (Ismail et al., 2022).

### **Assessment for future planning and teaching**

The foundational research of Black and Wiliam (1998) highlights that formative assessment, through ongoing feedback, supports immediate changes to planning and teaching, which allows for learning needs to be addressed early. Summative assessment, though less flexible, provides a broader overview of the student's attainment and informs long-term planning (Harlen, 2007). Assessment is vital for future planning, as it helps teachers to identify areas where students need additional support. Vygotsky's (1978) concept of the zone of proximal development highlights the stage where learners benefit from the guidance of a more knowledgeable other, such as a teacher. Therefore, understanding each child's current level is important because it allows the teacher to provide appropriate scaffolding and challenge to promote progress. Although dated, Vygotsky's work continues to influence modern educational theory and practice, showing his research remains central to current approaches (Leong, 2023; Verenikina, 2010).

Whilst both assessment types have their advantages and limitations, they are still effective in the classroom, with most teachers utilising both to inform their future planning (Dolin et al., 2018). Research suggests that when used together, these approaches offer a balanced view of pupil progress and contribute to more effective planning and teaching (William, 2011), so this study will explore how the frequency and perceived effectiveness of each assessment type influence classroom planning and teaching.

## **Methodology**

### **Research approach**

A case study approach was considered to be the most suitable methodology for this small-scale research project, 'A study on the frequency and efficacy of formative versus summative approaches for future planning/teaching', which was conducted over a two-week period (Priya, 2021; Tight, 2017) due to the timescale and small sample size. Case studies allow the researcher to explore individuals' experiences and beliefs (Grant and Lincoln, 2021), offering greater depth and understanding that is not often achievable through large-scale research (Thomas, 2022) and a more balanced perspective is created (Morse and Chung, 2003). This approach was chosen, as it enabled more detailed analysis of the reasons behind the preference of formative or summative assessment for future planning and teaching, rather than merely determining which was more effective. This was facilitated by a mixed methods approach, which combined quantitative data, such as the frequency of assessment types and teacher preferences, with qualitative data explaining the teacher's rationale behind these choices. This was effective as it increased the validity of the findings, giving readers more confidence in the conclusions and results they obtain from the study, which aids in gaining a broader, deeper understanding of assessment types

(Dawadi, Shrestha and Giri, 2021; McKim, 2017; Hurmerinta-Peltomaki and Nummela, 2006).

It is important to consider the limitations of case studies and mixed-methods approaches. The class in which the research was being conducted consisted of only 12 students who were being assessed, and the study was only conducted over a short period of time, so the research on the impacts of formative and summative assessment in practice may be less generalisable (Gibbons and Hodge, 2012; Bassey 2001). Mixed methods aided in the generalisability, however, as fifty-eight teachers from multiple schools gave feedback on which types of assessment they used most often and why, allowing a deeper understanding into assessment in practice. Whilst mixed methods are useful in research, they also have drawbacks, including the need to have expertise in both qualitative and quantitative approaches, and the challenge of interpreting the findings, especially in a study with such a small timescale such as this one (Oranga, 2025). However the knowledge in both approaches was strengthened in the run up to this research, allowing for more time and knowledge to analyse the findings.

## **Data collection methods**

### ***Field notes/reflections (appendix 2)***

The final data collection method chosen for this study was field notes including reflections on my lesson plans and general observations. Participant observation was the best way to conduct this research as it allowed me to maintain my role as a teacher while observing how assessment was implemented and how the students responded to subsequent interventions and changes in planning, gaining quality data on how effective assessment strategies are in practice (Musante and DeWalt, 2010). Field notes and reflections (appendix 2) can be analysed in a qualitative way, which can enrich data and offer deep contextual insights for analysis (Creswell, 2013; Lofland,

Snow, Anderson, & Lofland, 2005; Mulhall, 2003; Patton, 2002). They were chosen for this study because when combined with other methods, they can help triangulate data, increasing the validity and reliability of findings by providing another perspective on how assessment types are applied in practice.

Like all data collection methods, field notes and reflections/observations have their drawbacks. Whilst they provide strong data on how this research affects practice, it is not possible to know the reason behind why something has been observed; for example if a child responds better to an intervention than another child there is no way to know why (Curd-Christian, 2019). This could be combated with an interview or informal conversation with the child after if necessary to understand why they may not understand something.

### ***Survey (appendix 3)***

The first data collection method used was a survey sent out to multiple schools for teachers to complete, consisting of both open and closed questions. They are a time-efficient way to gather opinions on a topic (Minnaar and Haystek, 2013), which is useful given the short timescale of this research. The survey in this study generated both quantitative and qualitative data, meaning it showed a deep understanding of the assessment types effectiveness in planning (Dawadi, Shrestha and Giri, 2021; McKim, 2017; Hurmerinta-Peltomaki and Nummela, 2006). These teacher responses, paired with other data such as field notes on how these views manifest in practice gives the research stronger validity. The qualitative data from the survey was then sorted for thematic analysis, which allowed for greater understanding into the rationale behind teachers' responses (Braun and Clarke, 2024).

Surveys can be limited by factors, including low response rates, which may impact the reliability and generalisability of the data collected (Holtom et al., 2022). Whilst this was

initially a concern after sending the survey out to only one school, the issue was addressed by sending it out to 4 schools where it received fifty-eight responses. Despite the still limited sample size, the richness of the qualitative responses provided valuable analysis of the reasoning behind teachers' opinions.

### ***Tally (appendix 4)***

The second data collection tool used was a tally of how often each practice in each type of assessment was used. This was chosen because it was a time-effective way to gather quantitative data on frequency (Tumiran, 2024) which can then be paired with observations in classroom practice to produce valuable and reliable data (Vogl, 2023; Wenger, 1999), aiming to make the research more generalisable.

Its limitations lie in the inability of capture in-depth, personalised insights. Although it is effective for quantifying the frequency of assessment types, it lacks strong validity and reliability unless it is combined with other data collection methods (Vogl, 2023).

### **Ethical considerations**

This research obtained ethical clearance from York St John University. Gatekeeper informed consent was acquired from the headteacher (appendix 5) which is important in the safeguarding of children (Ramrathan, Grange and Shawa, 2017; Pillay, 2014) and their safety and privacy was maintained throughout the study (Cohen, Manion and Morrison, 2017). Parental consent was not required for this study, and participants were informed of their right to withdraw at any stage (Kumar, 2019). Names and the school's name have been kept private to ensure confidentiality and the storage of data has followed recommended protocols. All ethical considerations align with established guidelines (Denscombe, 2021; BERA, 2018).

## **Limitations**

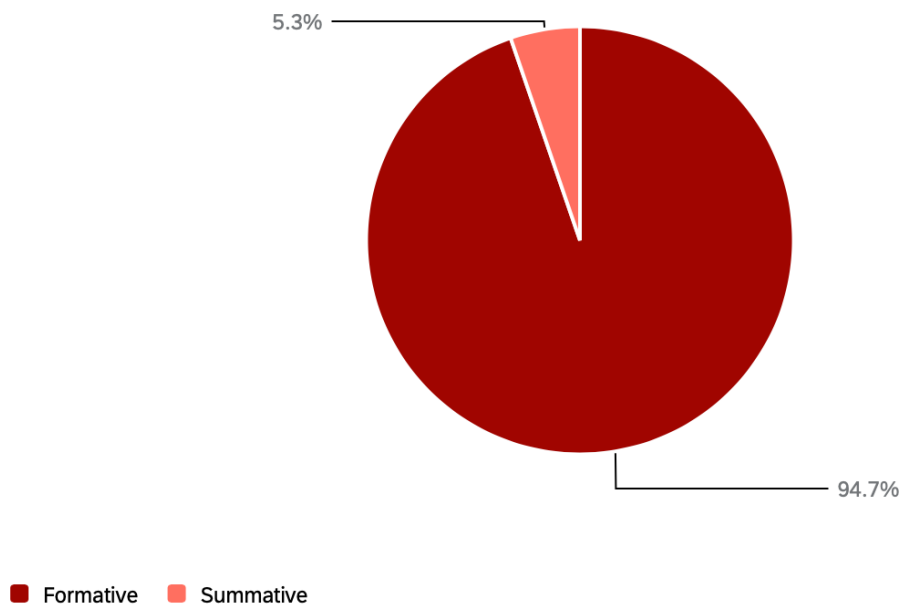
This study offers valuable insights into assessment use in practice, however, the generalisability is limited due to its small scale and short duration. The case study involved a class of twelve students over two weeks. Whilst fifty-eight teachers responded to the survey, creating more validity, future research would be necessary to explore more diverse settings with a wider range of assessment practices.

Despite these limitations, this research provides a perspective on assessment in practice on how teachers can use both assessment types to support effective planning and improve pupil progress.

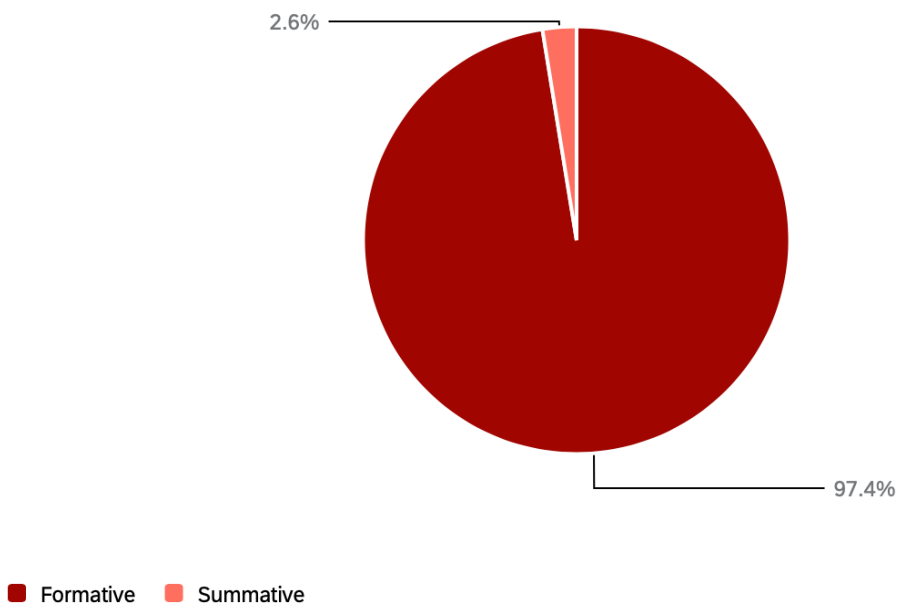
## **Findings**

This section presents key findings from the three data sources: the survey sent to teachers, the tally of assessment methods, and field notes and reflections on lesson plans. The findings are presented thematically, focusing of the perceived efficacy, frequency and how both formative and summative assessment are practically applied in the classroom.

***Figure 1- Which type of assessment do you use more often to inform your future planning and teaching?***



**Figure 2- Which type of assessment do you think is more effective for future planning and teaching?**



**Figure 3- Tally of the frequency of each assessment type**

Assessment type	Number of times used
Live marking (formative)	15
Circulating/listening/questioning (formative)	27
Thumbs up or down (formative)	5

End of topic test/assessment (summative)	2
Assessment sheet (summative)	5
Weekly reflections (summative)	2

### **Theme 1: Frequency of assessment type usage**

The survey revealed a dominant preference for formative assessment among teachers. As shown in Figure 1, 94.7% (55 out of 58) of respondents reported using formative assessment more frequently to inform their planning, whilst only 5.3% indicated the frequent use of summative approaches. Of all the responses suggesting formative assessment was more effective and frequent, 89% referenced its ability to provide support immediately and allow for timely adaptation of learning to the student's needs. This reinforces the perception that formative assessment is not only more frequently used, but also more effective in planning for pupil progress. They stated that 'it gives the stepping stones for what the students need to achieve next' and 'you are able to identify your next steps regarding planning subsequent lessons'. These statements reflect a practical advantage that formative assessment can support adjustments to instruction based on the student's needs.

In the classroom tally (Figure 3) formative strategies such as circulating and questioning (27 uses) and live marking (15 uses) far outweigh summative approaches such as end-of-topic tests (2 uses) and assessment sheets (5 uses). This is further reflected in the survey data, indicating that formative assessment is essential in the classroom due to its responsiveness. These results closely align with the data presented in Figure 1 where other teachers reported the frequency of assessment types, and the vast majority of teachers (94.7%) used formative assessment more often. The consistency across the self-reported data and classroom practice reinforces the finding that formative assessment is implemented more often in teaching than summative. The notes made while researching and the reflections on weekly lesson

plans (appendix 2) highlighted that in practice, formative assessment was mostly seen as more effective. The main points in the notes include how formative assessment allows for 'in-the-moment changes to lessons' and 'immediate insight into where the students need support', allowing for 'misconceptions to be addressed' and 'pupils to progress more based on rich, instant feedback they were given'. An experienced teacher also noted in feedback that 'the use of formative assessment techniques allowed [the teacher] to adapt the lesson and stop misconceptions from spreading further', further supporting the findings that formative assessment is used more frequently.

## **Theme 2: Perceived efficacy for planning and pupil progress**

When asked which type of assessment was more effective for future planning, 97.4% of respondents (Figure 2) chose formative assessment. Teachers' reasoning behind this often included its adaptability and immediacy of feedback, both for them and the students, stating 'you can make quick on-the-spot adjustments that impact the child's learning more effectively'. This overwhelming preference suggests that teachers view formative assessment as a more valuable tool for supporting their decisions of planning and adapting teaching to meet the student's needs in a responsive and timely manner. Conversely, summative assessment was described as offering a 'bigger picture' that is more useful for long-term planning but less so for daily planning and teaching.

The field notes and lesson plan reflections further reinforced this finding. For example, after using live marking, misconceptions were identified in the class and addressed immediately, which caused visible improvements in pupil engagement and their understanding of the topic, reflected in their work. Summative assessments also had a role, however, because in another lesson, an end-of-topic test identified a consistent

gap in understanding in the class, leading to two targeted intervention lessons being planned, which significantly aided in their progress in this topic.

### **Theme 3: Practical integrations and tensions**

The data suggests that although formative assessment is used more frequently and perceived to be more effective, both types of assessment have meaningful roles in the classroom. Teachers reported using summative tools for curriculum review and identifying large areas where more support was needed but noted the limitations for immediate change. The lower frequency of summative assessment reflects a lack of responsiveness and higher pressure on the students. Teachers expressed concerns that summative assessments, which are usually carried out at the end of a period of learning, do not provide immediate, actionable information which is needed for the responsiveness of teaching. Also, the nature of these assessments may cause some anxiety in students, which could affect their performance and not give a true reflection of what they actually understand. This leads to teachers favouring more dynamic formative approaches.

It should be mentioned that interestingly, some teachers emphasised the importance of having a balance between both assessment types, stating that 'formative is useful in the moment, but summative gives you a clear path on what to do in the next topic'. This suggests a complementary dynamic, where each assessment type has something different to contribute to the planning process. By using both assessment types appropriately, teachers can ensure that learning needs are met in the classroom, and that long-term changes are created.

All themes and findings reflect the same overall finding; formative assessment is used more frequently and is more effective for informing future practice and teaching and subsequently improving pupil progress.

## **Discussion**

This section will discuss the key findings in relation to existing literature and evaluate how they impact classroom practice and future planning.

### **Formative assessment**

The findings support the conclusion that formative assessment is used more frequently and is more effective for future planning and teaching, demonstrating it is the most effective in short-term planning.

The frequency and efficacy of formative assessment was a key area explored within the findings and literature. This concept, highlighted within the survey sent out to teachers, strongly aligns with existing literature. Research from Pramesti (2023) and Heritage (2021) supports these findings and emphasises that formative assessment is widely favoured because of its inherent ability to provide actionable, immediate feedback. This allows teachers to identify any misconceptions as they arise meaning intervention can be provided immediately, which was shown in this study, making it more useful for teachers to plan and adapt lessons accordingly. Teachers who use formative assessment more often are more skilled in adjusting lessons in real-time (Grozdev and Kirilova, 2015) contributing to greater pupil progress, which is also reflected in the findings through feedback from experienced teachers who stated I 'used formative assessment techniques [allowing me] to adapt the lesson and stop misconceptions from spreading further'.

The foundational work of Black and Wiliam (1998; 2018) further reinforces this by demonstrating how formative assessment, through ongoing feedback and monitoring, can almost double pupil outcomes compared to summative approaches. Within the research, I found that pupils did demonstrate higher levels of understanding in their work when formative approaches were used. More recent studies (Anders et al., 2022)

reaffirm this view by highlighting how formative practices create a child-centred classroom where feedback drives improvement rather than grades, which is supported by findings that formative assessment and feedback informs planning and drives pupil progress. In this study, pupils demonstrated noticeably higher levels of understanding in their work when formative strategies were utilised, supporting findings from Sadler (1998) who highlights the critical role of formative assessment in helping the students to understand what steps they need to take to improve and gives the teacher greater understanding of how to plan to allow them to do this. Vygotsky's (1978) theory of the zone of proximal development notes the importance of identifying when a child needs support from a more knowledgeable other to progress further. This closely aligns with the findings of this study which showed that formative assessment allows teachers to identify learning needs immediately and adapt in-the-moment. Also, Vygotsky (1978) emphasises the importance of timely, guided support, as the teachers in this study also agreed with.

Furthermore, teachers in both surveys noted that formative strategies enabled in-the-moment changes to planning, which was also found in practice through reflections. Nicol and Macfarlane-Dick (2006) and Lui and Andrade (2022) stress that this is important in adapting the lesson to the student's needs. Some researchers, however, caution that without a specific, concrete definition of what effective formative assessment looks like, the implementation of it can be inconsistent (Bennet, 2011; Kluger and DeNisi, 1996). To address this, this study focused on three specific methods- live-marking, teacher questioning/circulating and feedback signals- to ensure practices were measurable. Although this could make the study less reliable, there was no possible way to define and research every formative strategy, supporting the claims that a more defined definition would be needed to measure the effectiveness fully (Bennet, 2011; Kluger and DeNisi, 1996). Together, this research, paired with the

literature, explains why teachers consistently prefer formative assessment. It offers a dynamic approach to teaching and promotes pupil progress, making it an indispensable tool for future planning and teaching.

### **Summative assessment**

In contrast, although summative assessment plays a role in classroom practice, both literature and findings from this study suggest its use is more limited in day-to-day teaching and short-term adaptations and planning. Harlen (2007) and Cantley (2023) highlight that summative assessments often lack the immediacy and specific information needed to inform short-term planning, which was supported by the survey results, where only 5.3% of teachers reported using summative assessment more frequently. This was further reflected in the tally of assessment types (Figure 3), which recorded significantly less use of summative assessment strategies. However, summative assessment has value in evaluating broader learning outcomes and the effectiveness of the curriculum. Literature suggests that summative data is more effective in informing long-term planning and support curriculum development by looking at and comparing results on tests, for example (Adarkwah, 2021; Reddy et al., 2019). This was evident in research findings, where participants reported using summative assessment as a tool to identify class-wide areas where more support is needed, which can then guide planning of future intervention lessons, which I also found in practice. Therefore, while summative assessment may be less effective and used less frequently overall, it serves an important purpose in shaping longer-term planning.

Participants in this study reported using summative assessment more as overviews to guide broader intervention and curriculum review, rather than as a tool for everyday lesson planning. This reflects the research of McCarthy (2017), who argues that

summative assessment is effective in identifying trends and long-term gaps in pupil understanding. Similarly, Black et al. (2011) suggest that summative assessment results can be useful in informing school-wide changes and curriculum development. This is supported by the research in practice, where a gap was identified in the student's mathematics understanding, so two intervention lessons were included into the long-term planning which will be used in future years. It can be argued that if overused, summative assessment can become performative and not inform any future planning or teaching (Earle, 2018; Newton, 2009) which is why many teachers prefer formative assessment (Figure 2).

Whilst much of the literature raises concerns about the negative effects summative assessments, particularly end-of-topic tests, can have on student's well-being and motivation (Howard, 2020; Putwain and von der Embse, 2018; Cassady, 2004), the findings of this study presented a different perspective. Ismail et al. (2022) argue that summative assessments such as these can cause heightened anxiety in students, which could affect their performance. Robson et al. (2023) similarly highlight how anxiety in the students can disrupt cognitive processes, resulting in the child underperforming which does not reflect their true understanding. However, when used in practice, the end-of-topic tests allowed class-wide gaps to be identified, which meant targeted intervention lessons were planned. These led to visible improvements in the student's engagement and performance, because in the first lessons of this concept they were quiet and looked visibly confused, whereas after, they were discussing with partners and explaining to peers how to do the work and were more engaged. This suggests that when used within a supportive learning environment, summative assessments can enhance their motivation (Jerrim, 2024; Keogh et al., 2004). This contrast with the literature suggests that the framing and use of summative assessment can benefit both teacher planning and pupil outcomes.

## **Balanced assessment framework**

Whilst formative assessment has proven to be the most effective approach for future planning and teaching, this research also highlighted the value of combining the use of both formative and summative assessment. The findings suggest that whilst formative assessment is more prevalent and effective in short-term planning, summative assessment has great value in long-term planning. This supports Wiliam (2011) and Dolin et al. (2018), who argue that an integrated assessment approach would benefit schools.

A key implication for practice is the need for schools and teachers to acknowledge and support this balance. CPD sessions on assessment could allow teachers to enhance their knowledge on formative assessment strategies whilst also ensuring that summative approaches are used meaningfully to inform long-term planning without becoming too stressful for the students.

## **Summary**

In summary, the findings of this study, supported by a wide range of existing literature, demonstrate a clear preference among teachers for formative assessment. This stems from its adaptability, immediacy and positive affect on teaching, planning and learning. Formative assessment allows for immediate adjustments, making it powerful for promoting pupil progress and shaping planning. However, although formative is used more frequently, summative assessment still holds an important role in long-term planning and curriculum development. Together, both assessment types serve distinct but complimentary roles in supporting future planning and teaching, and subsequently aiding in pupil progress.

## Conclusion

This study explored the frequency and efficacy of formative and summative assessment in informing future planning and teaching in the primary classroom, and how this subsequently impacted pupil progress. The findings showed clear preference for formative assessment, which was used more frequently and seen as more effective overall. Strategies such as live marking, questioning and feedback signals enabled immediate adjustments to improve learning. Whilst summative assessment was used less frequently, it had great value for evaluating and guiding long-term planning. Though less responsive than formative assessment, it contributed meaningfully to broader planning decisions.

In the short time scale of this study, not every area could be researched fully, leaving unanswered questions that must be explored further in future studies. The research suggests that a balanced approach of both assessment types could be used effectively but how do external pressures (such as standardised testing and curriculum mandates) influence teachers assessment choices and their ability to implement a truly balanced approach? If this is not possible, how can they mitigate perceived drawbacks in practice of each assessment type to maximise their effectiveness?

Overall, this research highlights the important role that formative assessment plays in supporting responsive planning and teaching. It is viewed as the preferred and most frequently used type of assessment. Whilst summative assessment can be useful for long-term planning, it is seen as less effective and is used less often. As a result, formative assessment is considered more valuable for informing future planning and teaching.

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## Appendix 3- survey



Formative and summative assessment are broad areas. For the purpose of this study, formative assessment is a continuous way of checking learning in the moment, including live marking, thumbs up or down, checking children's work when circulating. Summative assessment measures 'how much' a student has learned at the end of a unit of work or topic, including end of topic assessments, assessment data and tests.

Which type of assessment do you think is more effective for future planning and teaching?

- Formative assessment
- Summative assessment

Which type of assessment do you use more often to inform your future planning and teaching?

- Formative assessment
- Summative assessment

Why do you think this type of assessment is more effective for future planning and teaching?

Why do you use this type of assessment more often to inform your future planning and teaching?

## Appendix 4- tally

Column1	Amount used		
Live marking/self assessment	15		
Circulating/listening/questioning	27		
Thumbs	5	Formative	Summative
End of topic test/assessment	2	47	9
Assessment sheet	5		
Weekly reflections	2		

## Appendix 5- headteacher consent letter

**QTS6004M Research Project Permission form**

Student name: Millie Spedding

SE3 School: St Joseph's Catholic Primary School

Headteacher permissions:

I have read this student's ethical clearance form and give my permission for the conduct of this small-scale research project.

Additional parental passive consent is not required/has been obtained (please delete as applicable)

Headteacher's name: SIMON FEAVES

Headteacher's signature: S Feaves

Date: 13/01/25