Recruitment and Retention Guidance

May 2026 update

Contents

Introduction

This document provides delivery and evaluation teams with information and guidance on:

- The recruitment process, expectations and EEF support
- Key risks in recruitment and retention
- Mitigation strategies for key risks

Teams are expected to use their best judgement on how to apply this guidance when carrying out their work. References to ‘settings’ in this document relate to early years settings such as nurseries, primary and secondary schools, and 16-19 settings such as colleges.

Recruiting to an EEF project

Recruiting to an EEF project can be thought of in three stages: pre-recruitment, recruitment, and post-recruitment.

Figure 1 - The recruitment steps

Pre-recruitment			Recruitment			Post-recruitment	
Set-up meetings take place	Project is approved at final EEF Grants Committee	Grant agreement is signed	Recruitment launches	Settings express interest	Settings sign a memorandum of understanding	Recruitment target is met	‘Keep warm’ activities take place before delivery begins

The EEF set a coordinated recruitment launch date when several projects are running to the same timeline. The launch date always follows EEF’s Grants Committee approval and considers the time needed for all parties to sign the grant agreement. The coordinated launch enables the EEF to provide more effective support, such as by generating greater media coverage. Informal recruitment activity may be carried out ahead of the specified date but should adhere to the following guidance:

Prior to final approval from Grants Committee:

- Grantees should refrain from speaking publicly in any capacity about the potential upcoming trial.
- They may wish to begin 'market warming' after first grants committee sign-off by mentioning the potential trial within their existing network of close contacts.

After final approval from Grants Committee but prior to grant agreement signature:

- Grantees are not permitted to publish any launch material prior to the signing of the grant agreement, such as their website page.
- Grantees may undertake “soft recruitment” and informally share trial details where there is an opportunity to support recruitment. Examples may include events attended by settings or informal discussions with stakeholders / networks.

- Whenever mentioning the trial before the grant agreement is signed, grantees should first check in with their EEF Programme Manager and use caveated wording such as: “we are looking to..." "we are currently finalising an agreement to...” "subject to funding" or in informal discussions with settings.

Before recruitment launches, several documents need to be finalised: **see ‘Section 1 | Working Together’** for a list of documents to be created by the delivery and evaluation teams.

Recruitment of settings typically involves an initial expression of interest (EOI) from the setting. If the setting then wants to formally commit to participate in the project, they sign a memorandum of understanding (MOU).

On occasion, settings that sign an MOU do not meet the evaluation requirements and cannot be included in the trial (for example, if they do not provide pupil data in time for randomisation). Therefore, a setting is only considered fully recruited when all evaluation requirements are met, and the setting has been randomised.[1]

Section 1| Pre-recruitment |

Planning the recruitment process

Recruitment is time intensive. Without a carefully planned process, delivery teams may struggle to recruit sufficient settings. A low sample size reduces the study’s sensitivity to detect an effect and may lead to project cancellation. Planning your recruitment process during the pre-recruitment phase minimises this risk.

There are several questions delivery teams should ask themselves when planning their recruitment process (Figure 2). These considerations will inform the recruitment strategy (**Appendix 1**), which will be drafted in the pre-recruitment phase and shared with the EEF for feedback.

The following section outlines these considerations in more detail by providing scenarios based on the experiences of prior grantees. Each consideration has an action step which delivery teams can use to help plan their recruitment process. A list of these actions can be found at the end of this document (**Appendix 2**).

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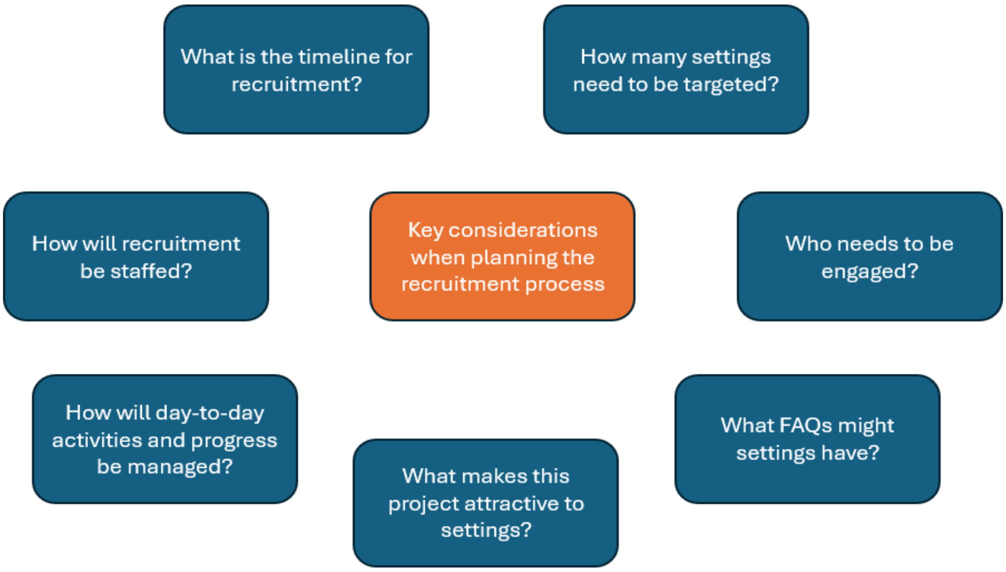
[1] There may be a variety of evaluation activities that need to be conducted prior to randomisation, including collection of pupil data, administration of a pre-test, surveys by teachers/early years educators. These are led by the evaluation team, but the delivery team should support this process. Information will also be sent to parents and carers prior to delivery launch. They are typically given two weeks to withdraw their child from the evaluation. Section 4 provides more detail on these activities.

Considerations when planning the recruitment process

Recruitment can be influenced by several factors, including the type of project and the relationship between the recruiter and the setting. Therefore, the guidelines and ideas highlighted here may not be appropriate for every project.

Figure 2 - Considerations when planning the recruitment process



What is the timeline for recruitment?

Recruiting for a research evaluation generally takes longer than recruiting for a programme without an evaluation component. Delivery teams should account for this when planning their recruitment timelines and ensure they are ready to begin recruitment on the agreed launch date, following the signing of the grant agreement.

For projects delivering in September, recruitment typically starts in the preceding January and continues until June, or earlier if the target is met.

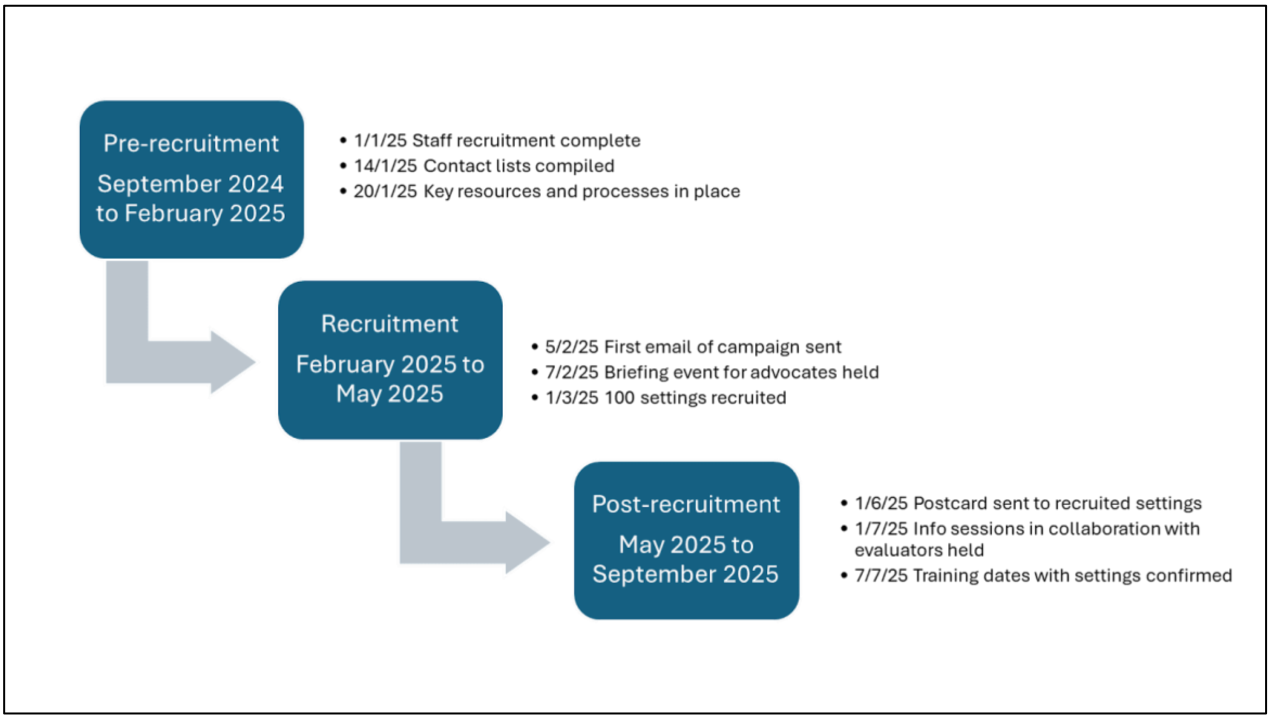
Recruitment can usefully be thought of as spanning three phases: pre-recruitment, recruitment, and post-recruitment. Each phase presents different challenges, often shaped by external factors. For instance, during the recruitment phase, settings are less likely to engage in the weeks leading up to national exams due to competing priorities.

Timing also affects when settings can make decisions. Projects that require significant staff time or changes to usual practice may be harder to commit to later in the academic year. Similarly, where financial contributions are required, school budgeting cycles may influence participation.
Delivery teams should take these factors into account when developing their recruitment timelines and setting milestones.

Scenario: Maths123 knows that they will begin delivering their programme in September 2025. They have been given a provisional recruitment launch date at the beginning of February and are planning to recruit until 31st May. They begin to map out their recruitment timeline in the three phases and set goals for each stage (Figure 3).

Action: Outline a recruitment timeline, noting the external factors that may influence recruitment capabilities. Set measurable objectives in each of the three phases, such as contact lists compiled (pre-recruitment), number of settings recruited (recruitment), keeping warm touchpoints (post-recruitment).

Figure 3 – Example recruitment timeline



How will recruitment be staffed?

Delivery teams should consider how they will staff the recruitment process. They will require administrative support, in addition to project leaders who will have detailed project knowledge and be the main point of contact for key stakeholders. Credibility with setting leads is important in conveying the potential benefits of the project, as is developing a strong administrative operation that enables staff to quickly follow up with settings that express interest.

Key staffing considerations include:

- Capacity and roles: Is sufficient FTE allocated to recruitment? Is recruitment handled by a dedicated role or shared across a team? What contingency plans are in place for staff absence?
- Knowledge and capability: Do recruitment and administrative staff have a strong understanding of the programme and the settings they are engaging with, enabling them to contact settings directly and respond effectively to queries and EOI submissions?

- Preparedness: Are those leading recruitment fully briefed on eligibility criteria and common questions about programme content and implementation? If not, delays in responding to enquiries can lead to disengagement from settings.
- Use of regional trainers: Where regional trainers are involved, are they appropriately briefed and able to support recruitment? Does their availability and the programme budget allow time to be allocated specifically for recruitment activity?

Scenario: 2 months prior to launching recruitment, Maths123 schedule a meeting to discuss how they will staff the recruitment of 150 settings to the project. They reflect that it will take several contact points to recruit settings to the trial. They also know they will be recruiting on a national scale. As a team of two, they decide it will not be feasible to carry out both meaningful promotional activity and the administrative tasks associated with securing sign- ups, particularly given that they have only 3 months to recruit to the project. They decide to recruit a project support administrator on a part time basis. The project leads then allocate local authorities equally between them, enabling them to have a specific focus on areas where they have key contacts. They schedule another one-hour meeting to define key processes.

Action: Identify how the recruitment process will be staffed, then consider and confirm how roles will be allocated across the team.

How will day-to-day activities and progress be monitored?

Delivery teams should establish clear systems and processes for monitoring their day-to-day activities and progress towards recruitment targets. By identifying and recording recruitment activities, teams will be able to allocate tasks between them, then reflect on what's working well, and if any changes need to be made.

Logging EOIs and MOUs is essential for providing the EEF with a fortnightly update on recruitment numbers. It will also be used to create a participant flow diagram which will become part of the final report. A record of all settings contacted and reasons for withdrawal must be kept.

Scenario: Maths123 recruit an administrator and begin to map out the different activities that will be taking place on any given day: project promotion, allocating EOIs, conversations with settings, chasing MOUs, responding to queries, updating the recruitment log, and submitting data to the EEF. They decide that in addition to their recruitment strategy, they will have a shared project planner that will be updated weekly, along with a shared inbox and data tracker.

Action: Consider how recruitment activities and data will be monitored, then create core shared documents and systems prior to project launch.

Figure 4 - Example weekly project plan

What	Who	Deadline	Follow up action
Construct contact list and plan email campaign			Arrange mail merge Create a spreadsheet to track
Arrange mailout to relevant settings			Follow up mailout with phone calls
Organise a paid ad on Facebook/LinkedIn/Twitter			Monitor engagement and repeat if impactful
Follow up any EOIs with a phone call to support conversion (set weekly target)			Log on spreadsheet. Monitor best time of day to contact.
Plan social media posts			Make EEF aware, monitor engagement and repeat
Join relevant Facebook groups and request to promote			Post in groups

How many settings need to be targeted?

Delivery teams should establish a target number of settings to contact to support them in meeting their recruitment target. The number of contacted settings will be significantly higher than the recruitment target (Figure 5). To establish this target, start by identifying the number of eligible settings. Consider the project specific eligibility criteria, such as locality, setting type, form entry etc. Teams will then be able to begin identifying who to target in these settings.

Initial research on the number of eligible settings in the target areas and gathering contact details for these settings should begin as early as possible. Before final EEF project approval, delivery teams can carry out informal recruitment activities, for example, gauging interest among local authorities, or informally highlighting the potential opportunity among their existing networks of settings.

Scenario: Maths123 use available data to establish how many secondary schools there are in England. They filter this data to include only state-maintained, mainstream schools. They remove schools that have completed their programme in the last 3 years. This is their target number of settings. They group these into regions, centred around six hubs where training will take place. They are now ready to think about who to target in these settings.

Action: Identify target settings by considering project specific eligibility criteria, such as locality and setting type.

Figure 5 – Example recruitment data from previous projects

Project	Recruitment Target	Settings Contacted	EOIs Submitted	MOUs Submitted
Project 1	300	4,584	514	316
Project 2	150	3,421	268	143
Project 3	30	280	48	29

Figure 3 highlights that for past projects, the number of settings contacted was consistently higher than the recruitment target. It also shows that not all EOIs convert into MOUs. This demonstrates that the number of contacted settings will need to be significantly higher than the recruitment target.

Who needs to be engaged?

When identifying who to target within settings, delivery teams should first consider who the key decision-makers are, i.e. those responsible for agreeing to participate in the project. This may include the headteacher, senior leaders, or subject leads.

Once the target audience has been identified, compile a comprehensive contact list before recruitment begins. Teams should decide how to approach these stakeholders and ensure they have accurate contact details (e.g. email, phone number, postal address). Engagement typically requires multiple touchpoints. Cold emails or letters alone are unlikely to be effective.
Delivery teams should therefore use a range of engagement strategies, including working with trusted or influential partners. Using “powerful messengers” has been shown to be effective in previous projects. These may include multi-academy trusts, local authorities, school improvement teams, teaching school alliances, initial teacher education providers, and universities.

Messaging should be tailored to different audiences, considering their specific priorities, responsibilities, and availability. For example, a Head of Department may need detailed information about staffing requirements and pupil involvement but may have limited availability during the school day to respond to calls.

It is also important to recognise that classroom teachers are unlikely to be able to formally confirm participation. Securing contact details for senior decision-makers—particularly headteachers—early in the process is therefore critical. Delivery teams should avoid sending MOUs to staff who cannot approve participation.

Scenario: Maths123 meet to discuss who they need to engage in the project. They begin by considering who they need to target in the schools. As a secondary maths project, they decide their target contacts will be both headteachers and heads of maths as both act as decision makers, with headteachers having overall decision-making power and heads of maths making curriculum decisions. They plan to search their existing database to compile a contact list of these contacts.

Maths123 map potential advocates in a shared spreadsheet. They consider this on a regional and national level, both known and unknown advocates. Where an advocate is known by a member of the team, they log this as a warm contact and add contact details. Once complete, the project administrator begins to gather contact information for the cold contacts, utilising the organisation's database and the internet.

Action: Identify who to target in settings and who potential advocates might be. Compile contact lists for both groups.

What makes this project attractive to settings?

Delivery teams should consider what makes the project attractive to target settings. A starting point might be to map the pressures and priorities of settings based on existing knowledge and research, then consider how unique aspects of the programme relate to these. Teams can then begin to think about how they will highlight these points in their messaging when promoting the project.

There are several general benefits of being part of an EEF trial (Figure 6). Delivery teams can include these in their messaging, particularly if recruiting to a randomised controlled trial where some settings will be allocated to the control group and might show hesitancy.

OFSTED also support settings taking part in EEF trials:

"... we don't want innovators to see the new framework as a brake. For example, if you are trying out new models as part of Education Endowment Foundation studies or are working on new approaches to curriculum or teaching or assessment, that will be recognised."

Amanda Spielman, HM Chief Inspector of Education, Children's Services and Skills.

While it is important to explain the programme fully and its potential benefits, be aware that settings are signing up to the trial, rather than to solely receive the intervention. It is essential that settings understand they are signing up to the evaluation and may be allocated to the intervention or control group. They must commit to participating regardless. In previous recruitment rounds, some settings were put off engaging with trials by the possibility of being randomised to the control group. It is therefore important to communicate that the approach being trialled shows promise, but has not yet been fully evaluated, and the importance of control groups in facilitating this evidence base. When outlining the benefits of taking part, ensure you are also focusing on the benefits of taking part in a trial.

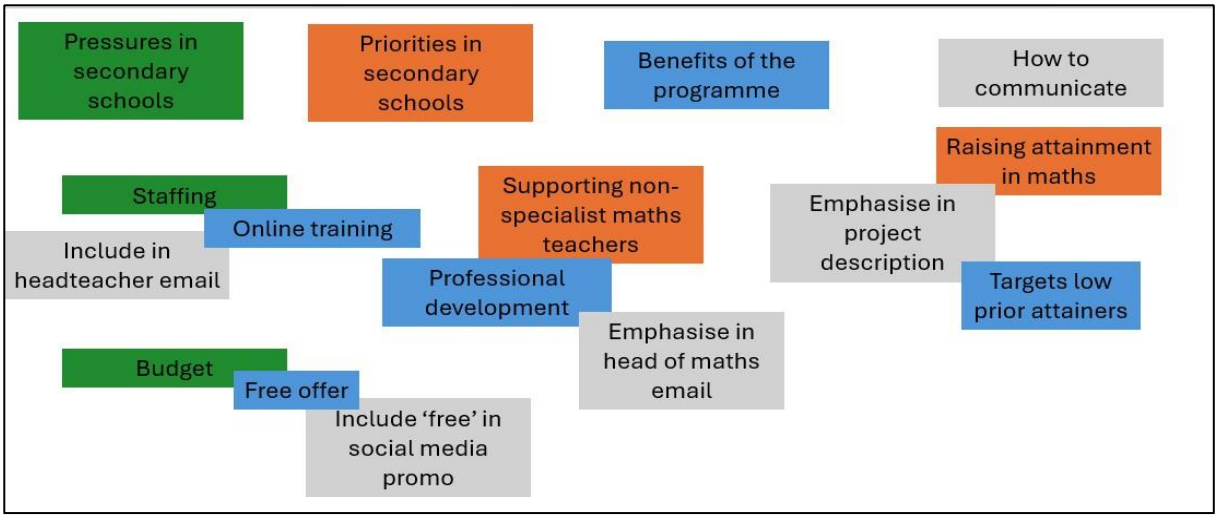
Scenario: Maths123 create a shared online whiteboard (Figure 7). They use a colour-coded system to add the pressures and priorities in secondary schools. They choose to focus on the priorities in relation to secondary maths as this is the focus of their programme. When complete, they map the benefits of the programme, making connections to the pressures and priorities. At this point, they consider how they will ensure these benefits are explicit in their messaging and add these to the shared whiteboard. Now that the benefits of the programme are identified, the team schedule a meeting to plan the recruitment resources.

Action: Consider how the benefits of the programme map onto current pressures and priorities in settings, as well as the benefits of taking part in a research evaluation. Identify how these will be communicated.

Figure 6 - General benefits of taking part in an EEF project

- If allocated to the intervention group as part of a trial, the setting receives a promising approach to improving attainment, usually at a subsidised cost
- By taking part in research, the setting is contributing to the evidence base and knowledge on what works in education in England
- Potential financial incentives for participating (if agreed as part of the evaluation design)
- There could be additional benefits, such as receiving results of post-tests (if this is part of the plan agreed at set up meetings)
- If taking part in a pilot, settings can access a high-potential programme at no cost.

Figure 7 - Mapping benefits



How will settings be targeted?

Delivery teams should use a range of approaches to target settings (Figure 8). Identifying these approaches in the pre-recruitment phase will enable teams to clearly outline the details of the approach in their recruitment strategy. Some approaches will require delivery teams to produce resources. This should be completed in the pre-recruitment phase. Delivery teams may utilise the templates provided (**Appendix 3**) or choose to draft their own assets.

Delivery teams must also develop a webpage for the project. This is a requirement for the EEF, and we will link to this on our own webpage for the project. At the very least, there needs to be a clear section of a webpage, which is easy for settings to navigate to.

We expect the webpage to have:

- A clear summary of what the EEF funded project is, with reference to EEF
- What the programme offers to settings and involves
- Which settings are eligible
- What the setting payment contribution is if allocated to the intervention group
- Links to more information/ recruitment documents including the setting information sheet and privacy notice are essential
- How to find out more information / sign up

EEF will also have a dedicated project page for every project, which includes recruitment information for settings and has an embedded EOI form for settings, which goes directly to the delivery team.

Delivery teams will need to continually reflect on their approach to targeting settings throughout the recruitment period. Delivery teams may need to adapt their strategy if it is not working effectively. For example, if settings aren't signing up to attend webinars and this is delaying MOU signing, the team may need to adjust their approach by pre-recording information sessions or booking calls with setting leads.

Scenario: Maths123 are well known in the education sector and have a large pool of potential advocates. They decide to utilise these contacts to promote the programme. They will draft promotional materials for the contacts to use, including email templates, a poster, and a slide deck. They decide to couple this with an email campaign to their target audience; a series of five emails with tweaked messaging over the recruitment period. They will ask early sign-ups to share the programme with their networks. Throughout the recruitment period, they will plan a series of social media posts.

They decide that individual phone calls will be too labour intensive given their recruitment target but will use them to nudge settings from EOI to MOU. Settings will be required to book a call with a project lead before being sent an MOU. A conversation guide will be drafted, and they will schedule time to rehearse these calls. A physical mail-out will form part of their contingency plan. The messaging in this activity will direct settings to their webpage, where more information is available, including clear sign-up mechanism.

Action: Decide which strategies will be used to target settings. Consider how these strategies might be deployed differently throughout the recruitment process. Draft resources where appropriate, including a dedicated project webpage.

Figure 8 - Example strategies for contacting settings

Strategy	How it can be used
Using key advocates	These advocates might include multi-academy trusts, local authorities, school improvement teams, teaching school alliances, teacher education providers, stronger practice hubs and universities. Again, it is crucial to compile a contact list of these stakeholders prior to launching recruitment.
Email	Teams should take time to compile a list of email contacts. Ideally, this should be the decision maker in the setting, rather than a generic email address. Where possible, personalise email communications. Emails should always include a call to action and teams should expect to email settings more than three times to get a response.
Posted materials	Though expensive, a mailout can support recruitment to a project. Material should be eye-catching, simple and have a clear call to action. For example, a simple leaflet with a QR code to sign up coupled with a personalised letter. This might be sent to all settings in a particular region where recruitment numbers are particularly low.
Snowball approach	Ask early sign-ups to share the project with their networks. This has proven successful in previous projects. Delivery teams haven't found it necessary to incentivise this, however, have stressed that building a relationship with settings prior to asking for support is essential.
Trainers	Where a programme includes a regional training approach, trainers could be allocated time and given support to promote the programme in their areas. This support might include resources, lists of stakeholders, promotional script.
Events	Delivery teams may promote the project at conferences organised by other organisations. Regional meetings of headteachers may be a good opportunity for reaching a key audience. Hosting recruitment events is another option (see webinar section below).
Social media	Teams may use their organisation's social media account to promote the project or develop a project specific account. Sites might include X, Instagram, Facebook, LinkedIn. Options for general posts, sponsored ads, posting in subject specific groups.
Press	Teams may choose to get their project promoted in the press. This should be coupled with tapping into warm contacts and utilising key contacts.
Phone calls	Phone calls should not be the main contact method as they are time consuming and not proven to be the most effective approach in the past. They might be used to follow up with settings that have submitted an EOI

	but not responded to follow up emails. Teams should consider the time of day when calling and track the phone calls made.
Webinars	Delivery teams may choose to host webinars for interested settings. These are most successful when they have: • A simple sign-up process • A varied schedule taking working hours into consideration • A short turnaround between submission of EOI and webinar • Using webinars to ensure settings who have submitted EOIs have the information needed to complete MOUs (rather than as a mechanism to generate interest/gather EOIs). • Recorded content for those unable to attend webinars • Where there are specific eligibility criteria or high demands on staff participation in face-to-face training, for example, making attendance at a webinar/recruitment event a condition of signing up, to ensure that settings fully understand the commitment. • Tailoring the webinar content to the audience. • Adequate time for questions.

What questions might settings have?

Delivery teams should think about potential questions in the pre-recruitment phase. By pre-empting potential questions and concerns, delivery teams can address these in their recruitment resources (e.g., information sheet, webpage, poster). Teams should consider the questions that might arise at each stage of the process and agree on answers to these questions, before building them into the recruitment resources.

Scenario: Prior to developing their recruitment resources, Maths123 create a shared whiteboard to note down potential questions (Figure 9). They think about the questions that might arise at each stage of the recruitment process. They think about both the programme and the evaluation. Given that they have delivered the programme in schools in the past, they are quickly able to identify the types of programme-specific questions that could arise. For questions relating to the evaluation component, they utilise the information available on the **EEF website**, as well as having conversations with evaluators and the EEF programme manager.

Action: Map out questions that could arise throughout the user journey. Draft responses to these questions and include them in recruitment resources.

Figure 9 - FAQ mapping

Prior to expressing interest	Prior to signing the MOU	After signing the MOU
Do I have to pay to participate?	What happens if our priorities change and we no longer want to take part?	We cannot release staff. Is there anything you can do?
What is a randomised controlled trial?	Can you guarantee that we will receive the programme?	Do we need to notify parents?
Can small schools participate?	What will be the impact on our pupils?	When will we hear from the evaluators?
Who has designed the programme?	Will we have to release staff for training?	Can we change the training dates?
What supporting evidence does the programme have?	Is the project GDPR compliant?	When will the baseline data be collected?
Who is the programme suitable for?	How far in advance will we know the training dates?	Can we do the training online instead of face-to-face?
Who are the EEF?	When will we find out which group we have been allocated to?	Can we announce that we are taking part?
How long will the project last?	When will we receive the thank you payment?	We have signed up to take part in two projects. Is that okay?
Is my setting eligible?	Can we select the teacher we want to participate?	Can we take part the following year instead?

Working Together | Delivery and Evaluation Team

The delivery and evaluation team should establish roles, milestones, and key dates at the beginning of the project. This should be in addition to a communication plan (**Appendix 4**). Clear communication helps to avoid overloading settings with multiple letters and emails, which can have a negative impact on retention.

In addition to this, evaluation and delivery teams should work together to produce a set of documents that will require ethical approval. It is important that these are produced in good time to allow for clearance.

Essential Documents

- Setting Information Sheet
- Memorandum of Understanding
- Parent/carer information sheet and withdrawal form
- Privacy Notice
- Data sharing agreement

Typically, the documents listed should only be shared with settings once the project has obtained ethical approval. Usually this sits with the evaluation team, but some delivery organisations (e.g. universities) also have a separate ethical procedure in place. The ethics review process usually takes 3-6 weeks but varies between organisations. We recommend evaluators find out what information is required for ethical approval, application deadlines and research ethics committee meeting dates, and begin this process as early as possible to prevent any delays to recruitment. It may be helpful for teams to meet with members of their ethics board before submitting application; to discuss potential concerns and ensure they are addressed explicitly within the application. It is likely that the documents listed above need to be approved as part of the ethics process, so work on these documents should begin as soon as possible.

The setting information sheet is typically produced first. This helps align teams on a consistent description of the programme and evaluation, which can be reused across other documents.

Details on core documents

Setting Information Sheet

This document summarises the purpose and content of the trial. It will be uploaded to the project's EEF webpage and shared with settings that express interest in the project. Details on the information to include can be found in the template and example (Appendix 6).

Grantees and evaluators may choose to include additional information, such as details on ethical considerations. However, they should keep in mind that the document should be no longer than three pages. Consider linking to further information found on the project webpage if necessary.

Memorandum of Understanding

Eligible settings that have received the school/setting information sheet and expressed interest are asked to sign an MOU to confirm that they agree to the terms of the study. This confirms their participation in the trial. The evaluation team usually drafts and shares the MOU with the delivery team, before reviewing and finalising with the EEF.

The MOU is a more detailed document than the setting information sheet, outlining the expectations and responsibilities for settings, the evaluation and delivery teams. The purpose is for all parties to have an agreed understanding of what the project involves, who is responsible for what, how the data will be collected and processed, and when. It should be signed by the headteacher or another senior member of staff with authority to give sign-off.

There are two clauses provided by the EEF that must be included:

1. Sharing contact information with the EEF (in the data protection section)

"In addition, the name and work email address of the main signatory on this memorandum of understanding will be shared with the EEF, so they can share the study's findings with participating settings. For details on how the EEF processes and uses personal data, please see **their privacy notice.”**

2. Safeguarding

“Responsibilities of the delivery team

- Ensure that all members of the delivery team visiting the school are familiar with the school’s safeguarding procedures and have received appropriate training on safeguarding protocols.
- Submit an anonymised safeguarding incident report to EEF covering any safeguarding concerns that have come up during the course of programme delivery.

Responsibilities of the independent evaluator

- Ensure that all members of the evaluation team visiting the school are familiar with the school’s safeguarding procedures and have received appropriate training on safeguarding protocols.
- Submit an anonymised safeguarding incident report to EEF covering any safeguarding concerns that have come up during the course of the evaluation.

Responsibilities of all settings recruited to the trial

- Inform any members of the delivery team and evaluation team who are visiting the school about the school’s safeguarding processes and provide details of the school staff member whom they should contact should a safeguarding disclosure need to be made.
- Ensure that members of the delivery team and evaluation team are never left unsupervised with children. A member of school staff should always be present to supervise activities.”

In a minority of cases, delivery teams may wish to have a separate agreement outside of the MOU with settings (e.g. when settings are required to contribute to programme costs as part of the trial or as part of the delivery team’s standard procedures). Please discuss this with your EEF programme manager if relevant.

A checklist and template for the MOU is available (**Appendix 6**).

Parent/carer information sheet and withdrawal form

This document informs parents/carers about their child’s involvement in the study. Opt-out consent is not a valid legal basis under the General Data Protection Regulation (GDPR) (please see article 6 (1) for personal data and article 9 (1) for special categories of personal data). However, under GDPR, all data subjects have the right to object to the processing of their personal data (article 21, GDPR). Therefore, parents or legal guardians – and/ or, where appropriate, pupils – should always be given the opportunity to withdraw their child’s (or, if applicable, their own) data from processing.

When settings send these out can differ from project to project. Parents/ participants should be given at least 2 weeks to withdraw, but they can withdraw at any point of the study. For participants who are

13 years or older, they themselves should be given the right to object to data processing, rather than their parents.

The evaluation team usually draft this document and share it with the delivery team and EEF. The information about the trial and data processing procedure can be drawn directly from the school/setting information sheet and the MOU, to ensure that parents are clear about how their children's data will be used in the evaluation. If pupils' outcome data were to be shared with settings on an individual level as an incentive for recruitment or for any other reasons, parents should be informed of the sharing and how the results will be used. This could also include a link to the Privacy Notice if this is published online. A checklist is available (**Appendix 7**)

Privacy Notice

If an organisation holds personal data, a privacy notice is required to demonstrate compliance with the GDPR and the Data Protection Act 2018. The number of privacy notices required will depend on the data controllership structure (i.e., whether the delivery team are independent or joint controllers, or processors). If the delivery team are independent data controllers, they will need a separate, project-specific privacy notice to the evaluator. Both should be provided to settings, online and via links in recruitment documents.

It is important that the privacy notice (and other recruitment documents) include information about how the data will be stored in the EEF Data Archive at the end of the evaluation, and how the data may be used from that point forward. A statement that evaluation teams can adapt to their specific project is provided on page 5 of the **EEF data protection statement**.

If individual pupil/participant results were to be shared with settings, the evaluators' privacy notice should include reference to the GDPR stating that the data sharing meets requirements of GDPR (article 13): Information to be provided where personal data are collected from the data subject. Alternatively, settings can inform parents about the sharing and usage of their children's data by sending them the web link to their settings' standard privacy notice stating that this sharing meet the requirements of GDPR (article 14): Information to be provided where personal data have not been obtained from the data subject. This will need to be done within one month of obtaining the data (see article 14 i(2)(f) and (3)(a)). A checklist is available (**Appendix 8**).

Data sharing agreement (DSA)

This document details the data that will be shared between the controllers on a project, which may include personal (e.g. parent/ teacher contact details) and non-personal information (e.g. class and setting name). This document is not mandatory but is considered good practice. It is usually drafted by the evaluation team and shared with the delivery team. All specified legal parties identified in the DSA must sign the final version. This typically includes only the delivery and evaluation teams. The EEF would only sign the DSA if it is described as a data controller in the DSA in relation to its archiving role. A DSA checklist is available (**Appendix 9**).

Note that if the delivery team are processors, there must be a Data Processing Agreement in place between them and the evaluator. This is a legal requirement.

It can be challenging to know what information to include on each document. An information map is available (**Appendix 10**).

What timeline should we work to when producing recruitment documents?

Allow a minimum of 6 weeks, with 8 weeks as the optimal timeframe. See example timeline below:

Document	Responsible (leading)	Shared by	Commented by	Finalised by
EEF project webpage	EEF	16/12/24	6/1/25	20/1/25
School info sheet	Delivery Team	19/12/24	07/01/25	15/1/25
MOU	Evaluator	17/1/25	23/1/25	28/1/25
Parent info sheet/withdrawal form	Evaluator	17/1/25	23/1/25	28/1/25
Parent/pupil privacy notice	Evaluator	17/1/25	23/1/25	28/1/25
School/staff privacy notice	Evaluator	17/1/25	23/1/25	28/1/25
EOI	Delivery Team	7/2/25	14/2/25	17/2/25
School data collection template	Evaluator	11/02/25	18/02/25	21/2/25
Data sharing agreement	Delivery Team and Evaluator	11/02/25	18/02/25	21/2/25

Managing the sign-up process

Schools and settings are busy environments with complex decision-making processes. Securing a signed MOU will usually require multiple points of contact. It is therefore important to hold contact details for more than one member of staff, including at least one senior leader with the authority to approve participation. Where payments are involved (e.g. school contributions or control group payments), having contact details for the finance team can also be helpful.

Delivery teams must also have a system in place to check whether settings are already participating in another EEF project. The EEF generally advises against settings taking part in more than one project involving the same pupils or subject area within a single academic year, to avoid contamination between programmes. If a setting receives overlapping training or support, it becomes difficult to attribute any impact on pupil outcomes to a specific intervention. Conducting these checks early can also help improve retention.

Not all EOIs will convert into signed MOUs. The average conversion rate for EEF trials is around 40%, although this is typically higher for pilot projects. Delivery teams therefore need to balance efforts to generate EOIs with a focus on converting them into confirmed participation. MOUs should only be sent to settings on request. Sending them too widely makes conversion harder to track and increases administrative burden unnecessarily.

Education Endowment Foundation

Figure 10 – Managing the sign-up process

Receiving EOIs: Is the process for submitting an EOI as clear and straightforward as possible?
Consider: • Is the form collecting only and all the essential information? • Can it be completed electronically? • Is it easy to find? • Is there one form to complete? • Is the form clearly signposted and hyperlinked? • Can the form be accessed by scanning a QR code on printed resources?
Managing EOIs: Does the process for managing EOIs involve personalised and timely contact?
Consider: • Has an inbox been established? • Who will be responsible for processing the submissions? • Who will follow up with settings? • How will they follow up (book a call, attend a webinar, watch a video)? • Is there a clear process for following up on EOIs received via the EEF website? Whichever follow up route grantees decide upon, settings must understand the project, the expectations and be eligible. Making personalised and timely contact with settings at this stage will support retention and is necessary if hoping to adopt a snowballing approach. Grantees should aim to follow up with new EOIs within a 48-hour window.
Managing MOUs: Does the process for managing MOUs take the need to chase into account?
Consider: • Who needs to sign the MOU, and can it be sent directly to them? • Can it be signed electronically? • How will settings be chased to sign? • How will this be monitored? • How will this follow up be monitored? Building a relationship with settings and putting a face to the project aims to reduce the need to chase. However, follow ups will be necessary and should be done throughout the recruitment period, rather than only at the end.

Support from the EEF

While the EEF will provide support throughout the recruitment process, grantees hold overall responsibility for recruitment to their project. The EEF typically has 15-20 projects recruiting in a single academic year, and the Programmes Engagement team coordinate the support provided to each of these projects. They review recruitment data across all projects on a fortnightly basis and plan promotional activity accordingly. The EEF will promote all our recruiting projects through:

- Dedicated project pages on our website with embedded EOI forms, and a search functionality for settings to find projects recruiting locally to them
- Resources for settings e.g. leaflets highlighting opportunities to participate in projects
- EEF central social media posts and social media advertising
- Mentions in our newsletters throughout the academic year, tailored to each phase (early years, schools and 16-19) in addition to the **EEF Exchange**
- Our Research School Network: EEF has a network of Research Schools across the country who are kept up to date of projects that are recruiting schools. Research Schools will promote EEF projects through their own localised newsletters with schools but also during relevant training/events as appropriate
- EEF 'Regional Delivery Leads' oversee EEF Research Schools and activity in different areas of England, and they will also promote EEF projects in their networks and contacts, as appropriate
  The EEF is sometimes able to feature recruiting projects through DfE channels e.g. newsletters
- We also run a series of recruitment guidance sessions during the pre-recruitment phase. Former grantees will share their experience of recruiting to an EEF-funded project and delivery teams will have an opportunity to workshop their recruitment strategy and ask questions.

The Programmes Engagement team work closely with Programme Managers throughout the recruitment process, providing feedback and guidance on recruitment to EEF-funded projects. The Programmes Engagement team may also contact delivery teams directly to discuss recruitment to their project. They can be contacted via email: **programmerecruitment@eefoundation.org.uk**

Section 3 | Post-recruitment |

Pre-delivery activities

Once settings have been recruited, the evaluation team will need to conduct a variety of activities before randomisation occurs, and delivery can commence. The following are all the responsibility of the evaluation team. However, it is important that the delivery team understand what is being collected and expected from settings before the delivery period begins and support the evaluation team where necessary. Who contacts settings about each activity should be decided in the communication plan.

Parent/carer letters

The evaluation team usually draft this document and share it with the delivery team and EEF. It is then given to settings who share the document with parents/carers/participants. They should be given at least 2 weeks to withdraw, but they can withdraw at any point of the study. It is important to build in enough time for this document to be shared and returned.

Collection of pupil/participant data

Pupil data is collected for all EEF studies to enable matching to the National Pupil Database and potentially tracking the long-term impact of the project. The evaluation and delivery teams should agree on the pupil/participant data that should be collected during the set-up meetings. Following the signing of the MOUs and prior to randomisation, a data collection template should be sent to settings by the evaluator, for settings to populate the pupil data.

Usually, five data points are required for linking e.g. first name, last name, date of birth, and unique pupil number (UPN). Delivery teams have found it helpful to mention that all this information can be found on a school's School Information Management System (SIMS). The UPN is needed to link to the NPD where data on statutory tests as well as background school and pupil information can be accessed. If sensitive information about pupils is going to be accessed such as information on ethnicity, English as an additional language (EAL) status or special educational needs (SEN) then this needs to be made clear in the information letters to parents, and the appropriate legal basis should be established. This data can be requested from the National Pupil Database (NPD) or from schools directly, although some schools may be resistant to this, and the quality of the data may be poor. Therefore, the EEF recommends getting this data from the NPD where possible.

Teams should decide in their communication plan if this data request should be sent by the evaluation or delivery teams, to streamline communication and minimise confusion to settings.

Pre-testing

EEF trials include a measure for prior attainment. This measure can either be a commercial test or prior performance collected from the NPD (e.g., KS2 SATs). When using a commercial test as a measure, there needs to be a pre-testing window in which pupils in the trial complete the tests. Tests are often conducted by settings to keep costs low but may be done by evaluators, an external data collection agency subcontracted by the evaluator, or by the delivery teams.

Pre-testing should be completed before randomisation takes place. If settings are randomised, allocated to the control group, and then asked to complete testing, they might refuse to take part, or the data may be biased once settings/participants are aware of their allocation. Settings should not be informed of their allocation until after they have completed the relevant pre-tests.

Pre-intervention survey to establish usual practice

An important part of the implementation and process evaluation for the project is to establish exactly what the intervention is being compared to (i.e. what does 'business as usual' look like). Especially for targeted interventions, pupils in control groups are often given additional support or training of a different kind. We ask evaluation teams to collect information from all settings at the start of a trial on what that setting is planning on doing that upcoming year in the area of the proposed intervention. For example, you would ask a school what they are planning on doing in their maths classes in the upcoming year for an intervention focused on whole class maths such as Maths in context. For an example of a usual practice survey and more information on the implementation and process evaluation, please see the **IPE handbook** (p.48).

Section 4 | Retention risks and mitigation strategies |

In the context of EEF evaluations, retention means obtaining the relevant data from participants for the analysis. The validity of the findings from a trial is illustrated by the padlock rating **2** which is heavily influenced by outcome attrition (i.e., did the setting provide post-test data or not). If settings or pupils/participants decline to take part in data collection or withdraw from outcome data collection during the study (known as “outcome attrition”), this will reduce the sample size and can introduce biases. It is a high priority in EEF studies that all teams make every effort to minimise attrition. See Figure 11 below for risks at different stages of the intervention and strategies for teams to use.

Some settings may not want to continue with the intervention, which could be due to various reasons like low engagement or problems with implementation fidelity (also known as “non- compliance”). This is the setting’s choice; however, delivery and evaluation teams should still encourage the setting to continue to take part in the evaluation activities (i.e. complete the post testing). Settings can be reminded of the commitments to the evaluation signed in the MOU and explain that by continuing to complete evaluation activities they are ensuring the study is robust and can serve to inform other settings. Likewise, settings should be reminded of any incentives to be paid upon completion of the post-test.

Control settings are often harder to retain in the post-test, as they have had little contact with the delivery team and will not have engaged very much with the project since recruitment. It is therefore important that the teams consider how they will ensure the control settings remain engaged. This could be through, for example, a newsletter or reminder at a few points throughout the project. EEF trials may also use incentives to support the retention of control settings (for example a small payment upon completion of post testing). This will be discussed at set-up meetings.

Settings can also decline to participate in other evaluation activities aside from the primary outcome testing, like interviews and surveys. This is undesirable and should be minimised, however missing these other evaluation activities pose smaller risks to the validity of the results of the study than outcome attrition.

When delivery teams become aware of a setting becoming disengaged or wanting to drop out of the evaluation, it is important to let the evaluator and EEF know promptly. Delivery and evaluation teams should keep track of how many settings dropped out of the trial before the post- test and their reasons for dropping out. This data is expected to be submitted to the EEF on a regular basis via the EEF portal, along with the regular recruitment data updates. [2]

Drop-out examples and how these impact on the security of the findings

Scenario 1: A setting signs the MOU but drops out before pre-test or randomisation[3]. No pupil data from these settings will be obtained, or any data collected should be deleted. These settings should be reflected in the participant flow diagram as dropping out before randomisation. These settings will not be counted towards the 'outcome attrition' figure. This does not introduce bias to the study because drop out is not affected by the treatment assignment (random allocation to intervention or control). However, this reduces the size of the sample available for the study unless the delivery team can find additional settings (e.g. from a waiting list) to replace them before randomisation.

Scenario 2: An intervention setting requests to withdraw from the intervention (non- compliance) after completing the pre-test (if applicable) and randomisation. However, the setting is willing to contribute to all evaluation activities. Both pre- and post- test data from this setting will be used for the main analysis, Intention to Treat (ITT) analysis, but the setting will be considered as non-compliant for the compliance analysis. The qualitative data collection from the Implementation Process Evaluation (IPE) around why a setting drops out of the programme would be particularly valuable in this case. This might dilute the effect of the intervention but is unlikely to affect the security of the impact evaluation[4]. Therefore, settings should ensure that outcome data is collected.

Scenario 3: An intervention setting requests to withdraw from the intervention (non- compliance) after completing the pre-test and randomisation. The setting agrees to contribute to the post-test only, but not other evaluation activities (e.g. case studies or surveys). Both pre- and post- test data from this setting will be used for the Intention to Treat (ITT) analysis but will be considered as non-compliant settings for the compliance analysis. This might dilute the effect of the intervention and may limit the conclusions made by the process evaluation but is unlikely to affect the security of the impact evaluation. Settings should ensure that outcome data is collected.

Scenario 4: A setting withdraws from the study after randomisation and withdraws from primary outcome data collection (outcome attrition). Post-test data from all pupils in this setting will be considered missing and this reduces the security of the impact evaluation. Evaluators and developers should work together to minimise these cases as they affect the robustness of the study. Retaining settings in the control group may be more difficult because these settings have less contact with the

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[2] https://d2tic4wvo1iusb.cloudfront.net/documents/evaluation/peer-review-process/Classifying_the_security_of_EEF_findings_2019.pdf

[3] The same applies if a setting drops out after randomisation but before they are told their treatment allocation.

[4] However, moderate to low compliance or poor implementation fidelity may lead to dropping in padlock.

project teams. Therefore, extra efforts to keep in touch (e.g. regular newsletter or reminders) and careful thought on incentives are needed.

Figure 11 - Risks and strategies for mitigating problems with retention

Stage of evaluation	Risks	Strategies
Pre-testing and sharing pupil/participant information (e.g. UPNs)	Some settings may find testing burdensome or become worried about sharing pupil data, or they may want to discontinue due to constraints in time and resources.	Evaluators should always consider the feasibility and burden of testing at the design stage. Explaining clearly what data is collected and why as they sign the MOU may help. Delivery teams should also have a clear understanding of evaluation activities and try to persuade settings to remain in the study. Both teams should be comfortable with the data protection implications of the study and should be able to reassure settings on this regard.
Shortly after randomisation	Some settings may want to drop out from the study as they are unhappy with the assigned randomisation allocation (e.g. they feel demoralised about not getting the intervention). Others may perceive the intervention to be too burdensome.	Ensure that settings are clear about how allocation takes places, what randomisation means and what resources are required to deliver the intervention. Remind settings of the ‘contract’ (MoU) that they have agreed to and remind them of the broader benefits of participating in the study to inform what other settings do in the future (i.e. lever pro-social motivations). Testing incentives should be considered especially for the control group to encourage data return.
During the intervention delivery	Some settings may be dissatisfied with the intervention and request to discontinue their participation.	Documents should clarify the distinction between dropping out of the intervention (non-compliance) and dropping out of the evaluation (outcome attrition). Delivery teams should record any non-compliance or risks when settings initially express concerns and notify the evaluation team. If they decide to discontinue, settings should still be encouraged to provide data for the

		evaluation (i.e. post-test and process evaluation data collection).
Post-testing (where primary outcome is not NPD data)	Some settings (especially control settings) can be unresponsive, which can make post-testing difficult to arrange.	Evaluators should begin to notify settings of the post- testing dates well in advance so that they can plan staffing and resources. Remind them of the incentives and the agreement in the MOU.

Keeping an implementation log

It may be useful for delivery teams to keep an implementation log, which can be shared with the evaluation team as a shared working document. This can help track whether some settings are disengaged with the intervention and whether they have communicated that they want to: 1) discontinue the intervention; 2) decline participating in evaluation activities other than post- test; or 3) decline participating in all evaluation activities including the post-test. Any accompanying information and reasons for these decisions would also be helpful for understanding the degree of non-compliance.

Project Partner Settings

We want settings to appreciate the benefits of research and know that their participation in the research project is appreciated. All settings involved in our evaluations will be designated EEF Project Partner Settings. After the project has recruited, the EEF will send the settings a certificate showing that the setting is an EEF Project Partner Setting. The EEF also will write to all settings at the end of the project thanking them for their contribution to building the evidence base and narrowing the attainment gap, along with sharing the evaluation report.

Section 5 | Appendices |

Appendix 1 | Recruitment strategy template |

Section 1: Overall Approach and Planning

1. Overall recruitment approach

- Please describe your overall approach to recruitment
  Ensure your response addresses the following:
- Use of multi-channel approaches (e.g. stakeholder engagement, mailouts, events, social media, snowballing)
- Reference to timing, including school holidays and the academic calendar.
- Approaches tailored to specific regions or setting types
- Plans to track effectiveness of outreach (e.g. monitoring referrals, channel analysis)

Type here

2. Key recruitment activities and sequencing

- Please describe key recruitment activities and how they will be sequenced throughout the recruitment period
  Include:
- Order and timing of outreach
- Specific activities (e.g. "mailout to all secondary schools in target LAs by 10 Oct")
- Coordination across channels (e.g. mailout followed by phone call/email)

Type here

3. Foreseen recruitment challenges and mitigation strategies

- Please describe any potential recruitment challenges and how you will address them
- Identify barriers or risks (capacity, reluctance, competing trials, etc.)
- Specify mitigation strategies

Type here

4. Recruitment team and infrastructure

- Please describe your recruitment team and how recruitment activities will be resourced
  Include:
- Team structure, number of FTEs and relevant expertise
- Staff roles and responsibilities, especially for admin processes (EOIs, MOUs, follow-ups)
- Use of external support (e.g. marketing firms, trainers, comms consultants)

Type here

Section 2: Recruitment

1. Recruitment targets

- Minimum and optimal number of settings
- If relevant: targets for priority areas, setting types, etc.

Type here

2. Eligible settings and participants

Provide:

- Eligibility criteria for settings and individuals
- Data demonstrating the size of the eligible pool
- Reference any caps or limits (e.g., no more than X% from any one LA)

Type here

3. Recruitment areas and potential concerns

Please include:

- Target areas, including Local Authorities (LAs)
- Flag any areas where recruitment may be more challenging, with reasons

Type here

4. Existing relationships and plans to build new ones

Provide:

- Details of existing contacts or partnerships in target areas
- Actions you'll take to build new (e.g. "webinar hosted in partnership with LA advisor", "outreach to regional maths hubs")

Type here

5. Awareness of similar EEF trials

Identify:

- Other trials recruiting similar settings at the same time
- A plan to manage overlap/conflict

Type here

Section 3: Process

1. Target contacts in settings and how you'll engage them

Include:

- Specific roles (e.g., Headteacher, SLT, Department Lead)
- Tailored strategies for decision-maker engagement

Type here

2. From expression of interest (EOI) to memorandum of understanding (MOU)

Outline a clear, feasible process, including:

- Initial contact methods (shared inbox, QR code, EOI form, etc.)
- Steps for eligibility checking, supporting conversion from EOI to MOU, and MOU tracking
- Assigned staff roles for each stage of the process

Type here

3. Ensuring settings fully understand trial expectations

Explain how:

- Information will be provided clearly and accessibly
- You will manage expectations and answer common FAQs
- You will assess whether a setting is truly informed and ready

Type here

4. Promotional materials and information resources

Describe:

- Type and format of promotional material (e.g., flyers, FAQs, videos).
- Channels and platforms used (print, email, website, social).

Type here

Appendix 2 | Action list |

1. Outline a recruitment timeline, noting the external factors that may influence recruitment capabilities. Set measurable targets in each of the three phases, such as contact lists compiled (pre-recruitment), number of settings recruited (recruitment), keeping warm contact point (post-recruitment).
2. Identify how the recruitment process will be staffed, then consider and confirm how roles will be allocated across the team.
3. Consider how recruitment activities and data will be monitored, then create core shared documents and systems prior to project launch.
4. Identify target settings by considering project specific eligibility criteria, such as locality and setting type.
5. Identify who to target in settings and who potential advocates might be. Compile contact lists for both groups.
6. Consider how the benefits of the programme map onto current pressures and priorities in schools and settings, and how these benefits will be communicated.
7. Decide which strategies will be used to target settings. Consider how these strategies might be deployed differently throughout the recruitment process. Draft resources where appropriate.
8. Map out questions that could arise throughout the user journey. Draft responses to these questions and include them in recruitment resources.

PROJECT DESCRIPTION

Summarise the offer (who, what, how much). This summary should be liftable, i.e., make sense without following text.

Outline the sign-up process in numbered steps. Include hyperlinks and key dates.

XXX is a free professional development programme for post-16 GCSE maths practitioners that aims to improve GCSE outcomes through an approach tailored to the needs of students in the post-16 sector.

This includes:

- Developing an understanding of mathematical structure.
- Building on students' prior knowledge.
- Prioritising curriculum coherence and connections.
- Developing understanding and fluency in maths.
- Developing a collaborative culture, in which everyone can succeed.

The structure of the programme enables practitioners to gain a deeper understanding of the fundamental aspects of XXX through face-to-face training, alongside collaborating with other practitioners through regionally delivered lesson study groups with a lead trainer. Expert practice will be modelled via video clips, alongside a complementary handbook and 12 exemplar lessons.

Outline eligibility. Include: setting type, any regional requirements, no. of learners, age range, key stage, engagement in other programmes

Eligibility

To participate, teachers must be in an FE college in England, and:

- Teachers must teach at least one GCSE Maths class of students within the age range 16 to 19.
- They must not have participated in the efficacy trial as either a Lead Teacher or intervention teacher.
- They must not be taking part in the NCETM Teaching for Mastery "Trailblazer" or "Cohort 1" cohorts, or any other substantial professional development during 2024/25 academic year.

The sign-up process

1. Register your interest by completing this short form before 21st June 2024 (insert link)
2. Have an opportunity to discuss the trial and programme with a member of the XXX team
3. Sign the memorandum of understanding and return it to XXX
4. Get started in October 2024

Outline programme delivery in simple language. Consider what makes it attractive to settings (is it flexible, are resources provided, what is the time commitment)

COLD PROMOTIONAL EMAIL

Subject Line: Take part in XXX, a fully funded XXX

XXX are inviting you to take part in an EEF-funded research project, trialling the impact of XXX, a fully funded professional development programme.

What is it?

XXX is a professional development programme, led by the East London Research School. It aims to enhance conversational skills in early years settings by training two professionals per setting.

These professionals receive mentorship to implement strategies like ShREC (an approach practitioners can use to engage with children) and interactive book reading. Training consists of 1.5 days of face-to-face sessions and six online modules, supported by experienced mentors who offer continuous guidance. Settings taking part in the evaluation will receive the programme free of charge. Funding will be provided to support settings with the costs of staff time for taking part in training activities.

As part of the evaluation study, half of the settings who sign up will be chosen at random to receive the programme starting in November 2024. The other half will continue with their usual teaching and not receive the programme.

Who can sign up?

Settings can apply if they have at least eight children aged two years old at the start of September 2024, attending for a minimum of 15 hours a week during the 2024 - 25 school year.

Settings must be in one of the following areas: XXX

Sources of further information linked and attached.

What are the next steps?

Register your interest in taking part by completing this short form.

Get in touch with the team if you have any questions.

EOI FOLLOW UP EMAIL

Subject line: Next steps for XXX – Secure your place

Thank you for expressing an interest in the trial of XXX.

Please find attached the School Information Sheet. This document will provide you with important information about the trial and should be read thoroughly before you go on to the next step of requesting a place on the trial. Please also find a link to the EEF webpage which also contains important information: LINK

If you require more information beyond that supplied in the attached document, please view our webinar which is available via the project webpage: XXX

If you feel you have all the information you require to move forward with your request to take part in this trial, **please respond to this email requesting a copy of the MOU (Memorandum of Understanding) and privacy notices.** Please note that the MOU will need to be signed, returned, and approved by a project lead before you are allocated a place on the trial.

Returning the signed MOU does not guarantee you a place on the trial.

Please respond to this email indicating if you require further information or if you wish to receive the MOU within 5 working days.

Kind regards,

CHASE EMAIL

Subject Line: Confirm your interest in XXX

Thank you for your recent enquiry regarding the trial of XXX. We are re-sending the information below as we have not yet received a response from you in relation to your enquiry.

If this opportunity is no longer of interest to you, please let us know so we can remove you from our mailing list.

Please find attached the School Information Sheet. This document will provide you with important information about the trial and should be read thoroughly before you go on to the next step of requesting a place on the trial.

Please also find a link to the EEF webpage which also contains important information: LINK

If you require more information beyond that supplied in the attached document, please view our webinar which is available via the project webpage: XXX

If you feel you have all the information you require to move forward with your request to take part in this trial, **please respond to this email requesting a copy of the MOU (Memorandum of Understanding) and privacy notices**.

Please note that the MOU will need to be signed, returned, and approved by a project lead before you are allocated a place on the trial.

Returning the signed MOU does not guarantee you a place on the trial.

Please respond to this email indicating whether you would like to proceed within 5 working days.

Kind regards

Call to action (might be booking a call, attending a webinar, requesting MOU)

NO RESPONSE TO MOU EMAIL

Subject Line: Secure your place on XXX

Thank you for expressing an interest in taking part in the trial of XXX. We note that you were sent the MOU on (INSERT DATE).

I have called your school today to ensure that you have all the information you require but was unable to reach you.

We are keen to know if you intend to sign and return the MOU, or if you require any further support or assistance before doing so. If you require further support, I can arrange a 1:1 meeting with one of the project leads. Please let me know if this would be your preferred next step.

Alternatively, if you no longer wish to pursue requesting a place on this trial, please let us know so we can update our records accordingly.

Kind regards,

FEW REMAINING PLACES EMAIL

Subject Line: Last remaining places on EEF-funded maths trial

As we enter the summer term, you may be planning your training and curriculum offer for the next academic year. We have a few places left on XXX, an evidence informed programme focused on raising standards in primary maths.

XXX is a whole-class programme that aims to improve maths attainment for Year 2 pupils by developing their understanding of the logical principles that underpin maths.

The programme starts with an online training course for teachers and teaching assistants that gives them the knowledge and skills to deliver the programme over a 12-to-15-week period.

We are recruiting schools in all regions across England to this EEF-funded trial of XXX. The programme will complement schemes or approaches to teaching and learning maths, including mastery.

Find out more and **express your interest!**

STAKEHOLDER EMAIL

Subject Line: Engage settings in evidence informed practice

Dear XXX,

XXX is working with The Education Endowment Foundation to trial XXX, a whole-class programme that aims to improve maths attainment for Year 2 pupils by developing their understanding of the logical principles that underpin maths.

The programme will start with an online training course for teachers and teaching assistants that gives them the knowledge and skills to deliver the programme over a 12-to-15-week period. It is intended to complement schemes or approaches to teaching and learning maths, including mastery.

We are recruiting schools in XXX and would be very grateful if you could help to support the promotion of our programme with any existing networks of schools and settings that you have. There is some promotional content attached to this email to support with this.

Should you have any further questions, please do not hesitate to get in touch.

Thank you for your support. XXX

SOCIAL MEDIA POSTS

1. Calling all early years professionals! Enhance your knowledge of communication and language for free with the XXX programme.

   Get involved in XXX's fully funded communication and language programme by taking the following three short steps:
   1. Express your interest
   2. Attend a short webinar
   3. Sign a Memorandum of Understanding

   Begin here! (LINK)

2. Calling all early years provisions with 12 or more 3–4-year-olds in the South West, North East, and North West, sign up for free training in communication and language! Click here to check your eligibility and sign up.

3. We want to know what works when it comes to improving attendance and reducing exclusions in secondary schools. Help us understand by completing this survey on your school's behaviour policy.

4. What is the impact of school behaviour policies on school culture and climate? Help us answer this question by completing this survey on your school's policy.

5. Calling all headteachers and behaviour leads! Help us understand the relationship between behaviour policies and secondary school attendance by completing this survey.

6. Calling all 16-19 GCSE Maths teachers! XXX professional development programme will facilitate you to effectively build on your students' prior knowledge in maths, in a culture created to succeed. Sign up here

7. Contribute to the 16-19 GCSE maths evidence base by participating in our new trial, evaluating the effectiveness of the XXX professional development programme, funded by The EEF (TAG)

LETTER TEMPLATE

Subject: Secure a place on a fully funded Early Years professional development programme, now available in your region.

XXX are inviting you to take part in a fully funded early years research project.

[insert project name]

What is it?

XXX is a professional development programme, led by XXX. It aims to enhance conversational skills in early years settings by training two professionals per setting.

These professionals receive mentorship to implement strategies like ShREC (an approach practitioners can use to engage with children) and interactive book reading. Training consists of 1.5 days of face-to-face sessions and six online modules, supported by experienced mentors who offer continuous guidance. Settings taking part in the evaluation will receive the programme free of charge. Funding will be provided to support settings with the costs of staff time for taking part in training activities.

As part of the evaluation study, half of the settings who sign up will be chosen at random to receive the programme starting in November 2024. The other half will continue with their normal teaching practice and not receive the programme.

Who can sign up?

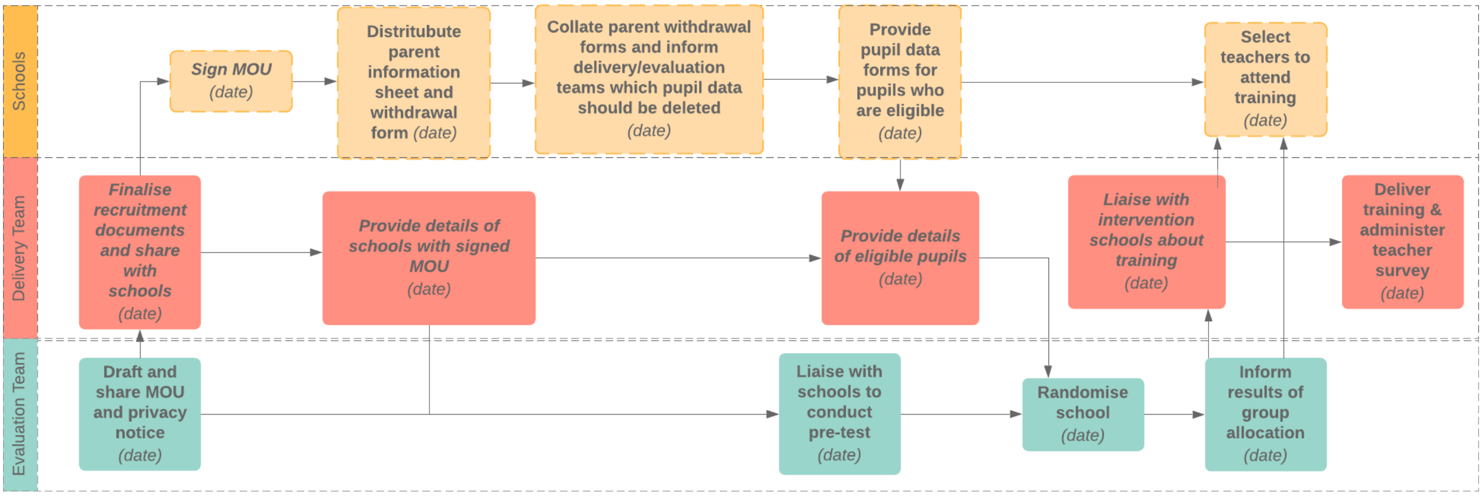
Settings can apply if they have at least eight children aged two years old at the start of September 2024, attending for a minimum of 15 hours a week during the 2024 - 25 school year.

Settings must be in one of the following areas: XXX

What are the next steps?

Register your interest in taking part by completing this short form. Get in touch with the team if you have any questions.

Appendix 4 | Communications plan |



SETTING INFORMATION SHEET TEMPLATE

ORGANISATIONS LOGOS NAME OF PROGRAMME SUPPORTING IMAGE

Overview (approx. 100 words)

Give a snapshot of the programme and why participation is valuable.
Structure:
XXX is partnering with the Education Endowment Foundation and XXX to evaluate ...
This programme aims to ...
This trial will assess the impact of...
This is an exciting opportunity for your setting to ...
Participating will support ...

Example:

The Hanen Centre is partnering with the Education Endowment Foundation (EEF) and NatCen to evaluate Learning Language and Loving It. This programme aims to support nursery workers to help young children to build their language and social skills. The trial will assess the impact of Learning Language and Loving It on children's language, communication, and socio-emotional development, aged 3-4 years in early years settings. This is an exciting opportunity to access professional development for your staff, for free!

What does the programme involve? (approx. 300-500 words)

Describe what the programme involves for the school in simple language (e.g., what will students be doing, what will staff be doing - time commitment, training, professional development).
Structure:
The programme involves ...
Leaders will ...
Teachers will ...
Students will ...

Example:

This professional development programme trains early years practitioners in strategies that help all children build language and social skills. For example, strategies that encourage children to initiate and engage in conversational interaction, which can be woven into everyday activities. Training will be delivered through group sessions, alongside individual video reflections. Nursery leaders need to provide a key contact to work with NatCen to support the evaluation and commit to engaging staff in the training as well as the evaluation activities.

What are the benefits of participating? (approx. 100 words)

Bullet point three to four benefits (treatment & control)

Structure:
By taking part, your setting is...
This means that...
Intervention schools will receive...
All participating schools will receive...

Example:
By participating in the trial, all schools will not only help understand the impact of the programme on pupil writing skills but also contribute to the education evidence base that informs efforts to improve outcomes for all children. The evaluation report will be publicly accessible on the EEF website upon project completion. All participating schools will also receive the results of the writing assessments that the pupils complete at the end of the trial. Intervention schools will receive subsidised CPD training for one teacher, delivered by experienced learning practitioners.

Eligibility (approx. 100 words)
Bullet point the eligibility criteria in few words.
Structure:
To participate, settings must meet the following criteria:
Setting type
Age/Year
Regions
Participation in other programmes

Example:
To participate, settings must meet the following criteria:
Be a state-maintained nursery or PVI setting
Have 17 or more pre-school children
Be in the North, the East Midlands and the Humber or West Midlands
Not be taking part in any other EEF research trial in the same period

Who is running the project? (approx. 200 words)
Give a brief overview of the grantee and evaluator organisations
Structure:
XXX is a...
They aim to...
They have designed [programme name]...
They will be evaluating...

Example:
The Hanen Centre is a non-for-profit charitable organisation that develops programmes that aim to promote children's language and literacy development during everyday activities. They have designed the Learning Language and Loving It programme. The National Centre for Social Research (NatCen) is

a not-for-profit social research organisation. They will be independently evaluating the impact of Learning Language and Loving It.

How does the trial work? (approx. 200 words)

Explain the purpose of the trial – what do evaluators want to find out? Explain randomisation and role of control group. Outline what settings will be committing to and what they will have to provide evaluators with

Structure:

The purpose of the trial is...

This is a Randomised Control Trial (RCT), therefore...

Settings will be randomly allocated to...

The intervention group will...

The control group will...

Settings will be required to...

Example:

The purpose of the trial is to evaluate the effectiveness of the Learning Language and Loving It programme on children's language and social skills. To do this, settings will be randomly allocated to either the control or intervention group. The control group will not receive the programme and will continue with their normal practice. If allocated to this group, settings will be given up to £1000 as a thank you for completing the evaluation activities. The intervention group will receive the Learning Language and Loving It programme.

The evaluation activities include:

- Short assessments with children at the beginning and end of the year
- Videos of nursery staff to capture change in practice
- Short staff questionnaires
- Short interviews
- Workshop observations
- Settings will also need to:
- Hand out parent information leaflets
- Provide pupil data
- Ensure staff attend training
- Communicate with the evaluation team (NatCen) and the delivery team.

Are there any costs involved? (approx. 100 words)

Do schools/settings need to make a monetary contribution to the cost of the programme? Do they need to be aware of any other costs, e.g. staff cover for training/ tech resources?

Structure:

[Intervention] schools / settings will contribute...

Example:

Intervention schools will be asked to pay £200 per teacher towards the cost of the training.

How will data be used? (approx. 150 words)

Summarise how data will be used and protected.

Structure:

- XXX will be collecting data on…
- XXX will use the data to…
- XXX will treat all data… in accordance with…
- For further information…

Example:

- NatCen and the project partners will treat all data securely, confidentially and in accordance with data protection law.
- Personal data will be collected and used to conduct the evaluation, with pseudonymised data being shared for archiving and further research at the end of the project. Your nursery, staff, and the children you look after will not be identified in any report arising from the research.
- For further information, see the privacy notice for the evaluation which is available on the NatCen website.

What is the timeline for this project?

(Please use a table or diagram where possible)

What happens after a school/setting expresses an interest?	
When will schools/settings hear whether they have been allocated to the intervention or control group?	
When will the programme be delivered?	
When will pre- and end-testing be carried out?	
When will control group schools/settings receive incentive payments?	
When will the evaluation results be published?	

Interested in participating?

More Information (hyperlink website)

Ask a question (hyperlink email)

Register your interest (hyperlink EOI)

Provide contact details for the evaluator and programme developer.

EXAMPLE SETTING INFORMATION SHEET

Learning Language and Loving It™ – The Hanen Program® for Early Childhood Educators

Overview

The Hanen Centre is partnering with the Education Endowment Foundation (EEF) and NatCen to evaluate Learning Language and Loving It. This programme aims to support nursery workers to help young children to build their language and social skills. The trial will assess the impact of Learning Language and Loving It on children's language, communication, and socio-emotional development, aged 3-4 years in early years settings.

This is an exciting opportunity to support the language and social skills of children in your setting, for free!

Who is running the project?

The Hanen Centre is a non-for-profit charitable organisation that develops programmes that aim to promote children's language and literacy development during everyday activities.

They have designed the Learning Language and Loving It programme. The National Centre for Social Research (NatCen) is a not-for-profit social research organisation. They will be independently evaluating the impact of Learning Language and Loving It.

What does the programme involve?

This professional development programme trains early years practitioners in strategies that help all children build language and social skills. For example, strategies that encourage children to initiate and engage in conversational interaction, which can be woven into everyday activities. Training will be delivered through group sessions, alongside individual video reflections. Nursery leaders need to provide a key contact to work with NatCen to support the evaluation and commit to engaging staff in the training as well as the evaluation activities.

Eligibility

To participate, settings must meet the following criteria:

- Be a state-maintained nursery or PVI setting
- Have 17+ pre-school children
- Be in The North, The East Midlands and the Humber or West Midlands
- Not take part in any other EEF research trial in the same period

How does the trial work?

The purpose of the trial is to evaluate the effectiveness of the Learning Language and Loving It programme on children's language and social skills. To do this, settings will be randomly allocated to either the control or intervention group. The control group will not receive the programme and will continue with their normal practice. If allocated to this group, settings will be given up to £1000 as a thank you for completing the evaluation activities. The intervention group will receive the Learning Language and Loving It programme.

Evaluation Activities	Setting Activities
Short assessments with children at the beginning and end of the year	Hand out parent information leaflets
Videos of nursery staff to capture change	Provide pupil data
Short staff questionnaires	Ensure staff attend training
Short interviews and workshop observations	Communicate with the evaluation and delivery teams

What are the benefits of participating?

- Potential to receive free professional development
- Potential improvements in children's language and social skills
- Contribute to the education evidence base aiming to improve outcomes for all children

Are there any costs involved?

There are no costs associated with this programme. The nursery will need to ensure that staff attend the entirety of the Hanen LLLI training 2.5-hour workshops (virtual and face-to- face).

How will data be used?

All data will be treated with the strictest confidence – your nursery, staff, and the children you look after will not be identified in any report arising from the research.

NatCen is the data controller and data processor for this evaluation. Our legal basis for the evaluation is "legitimate interest". More information can be found in our privacy notice, which you can access online.

All personal information and any other data held on the project will be securely deleted after one year from project completion in December 2023.

For research and archiving, NatCen will share pseudonymised assessment data with the Department for Education, the EEF's archive manager, the Office for National Statistics and potentially other research teams.

At the end of the research project, this data will be submitted to the ONS SRS in the EEF data archive (this is managed by FFT). This will include data only identifiable to the Department for Education and no information will be archived that could be used to directly identify individual pupils (for further information, see EEF's archive privacy notice). Further matching to National Pupil Database (NPD) and other administrative data may take place during later research.

What is the timeline for this project?

What happens after a school/setting expresses an interest?	The Learning Language and Loving It Team will be in touch to book a call to discuss next steps.
When will schools/settings hear whether they have been allocated to the intervention or control group?	September 2024
When will the programme be delivered?	November 2024 to May 2025
When will pre- and end-testing be conducted?	October 2024 and June 2025
When will control group schools/settings receive incentive payments?	June 2025
When will the evaluation results be published?	June 2026

Interested in participating?

More Information **Ask a question** **Register your interest**

Contact **ABC@DEF.com** with questions related to the programme. Contact **LMN@FGH.com** with questions related to the evaluation.

MOU CHECKLIST

Project Overview	
To include	**Further details**
What is the programme we’re testing?	What are we trying to find out? (e.g., the impact of x on x)
Project team description (e.g. who are the grantee)	
Aims of the evaluations	Top level aims of the evaluation
Eligibility criteria at setting and child level	
How does my setting benefit?	Include incentives (for control and/or intervention settings as applicable) and costs where applicable
Why a randomised controlled trial?	Remove for pilots
The research team and independent evaluation	Details of the evaluation team and details of the evaluation (How many settings involved, what measures we are collecting)
Logos for the evaluation and delivery organisation and the EEF	
Project timetable	Include key dates for both intervention and control settings (e.g. control settings still need to do data collection, testing etc).
Data protection	
Summary of data protection policy and GDPR compliance	
Link to privacy notice relevant to the project and/ or privacy notice attached (not generic policy)	
Legal basis for processing personal data under GDPR/ DPA 2018	If ‘legitimate interest’, specify what actual interest the evaluator

	has in processing data for the evaluation, and refer to the legitimate interest assessment conducted
Legal basis for processing special categories of personal data (if any used) under GDPR/ DPA 2018	
Data processing roles (e.g., evaluator – most likely data controller, developer – joint data controller or data processor)	
Data processing purposes	
Parties with access to data (all the parties the data will be shared with, and the purpose of sharing)	Including lead contact information being shared with the EEF.
Retention periods and information about data being added to the EEF archive at the end of the evaluation	How long different types of data are retained for, and why.
Responsibilities	
Responsibilities of the grantee	Recruitment, financial, e.g. incentives, comms, delivery
Responsibilities of the independent evaluator	Data protection and ethics, data collection and analysis, randomisation, comms, fieldwork, reporting, safeguarding, etc.
Responsibilities of all settings recruited to the trial	Sharing pupil/setting data, facilitating testing (add/ adapt depending on project)
Responsibilities of intervention settings	Pupil/participant testing, data collection and monitoring, participation in the programme.
Responsibilities of control settings	Pupil testing, data collection and monitoring, and any restrictions (e.g. not using the intervention programme).
Agreement	

Name of setting, named contact at the setting	
Named contact details for delivery and evaluation teams	
Agreement to participate and withdrawal of participation	
Signing box (to be signed by the named setting contact and potentially also the Headteacher, and the delivery and evaluation teams)	
Who to send signed copies to	

MOU TEMPLATE

Memorandum of Understanding (MoU)

[Add Delivery and Evaluation Team logos]

[Project Name]

[Project Timeframe]

1. Purpose of this Document

This Memorandum of Understanding (MoU) outlines the roles, responsibilities, and expectations of all parties involved in [Project Name], funded by the Education Endowment Foundation (EEF).

Participation in this project involves agreeing to both programme delivery (where applicable) and data collection activities for the purpose of independent evaluation.

This document must be signed by a headteacher or member of the senior leadership team at the participating [setting/school/college].

2. About the Programme

[Programme Name] is a [brief description of the programme and its aims]. The programme is being delivered by [Delivery Team], who will also provide [brief description of delivery team support].

3. About the Evaluation

An independent evaluation will be conducted by [Evaluation Team] and will assess the impact of the programme on [target outcomes] using [brief description of methodology]. The evaluation includes pre- and post-intervention data collection, surveys, and possible qualitative feedback (e.g. case studies or interviews).

[If applicable] This is a randomised controlled trial (RCT), meaning schools will be randomly assigned to either an intervention or control group. Participating schools will [brief description of programme offer and what intervention schools are required to do]. Schools assigned to the control group will NOT receive [Programme Name] and will serve as a comparison group for the schools/pupils receiving the intervention.

4. Eligibility Requirements

Settings/Schools/Colleges must:

Meet the recruitment and data sharing requirements (e.g. number of eligible pupils, staff capacity).

Nominate a key contact to liaise with the delivery and evaluation teams.

Not currently be delivering similar interventions that may conflict with the trial (often this will be another EEF trial targeting the same year group or subject)

[Add all project-specific eligibility criteria]

Participants (pupils or learners) must:

Fall within the eligible age or year group.

Attend for the minimum required hours per week.

Have not been withdrawn from the study by a parent or guardian.

[Add all project-specific eligibility criteria]

5. What Participation Involves

For All Settings:

Distribute parent/carer/learner information sheets and withdrawal forms.

Share anonymised or pseudonymised participant data securely.

Support baseline and endline assessment administration.

Facilitate staff and/or learner surveys.

Cooperate with setting visits or interviews if selected as a case-study.

If allocated to the intervention group:

Release staff to attend training.

Implement the programme with fidelity to agreed protocols.

Complete any monitoring forms or session logs.

If allocated to the control group:

Continue with usual practice.

Support evaluation activities (e.g. assessments, surveys).

May be offered access to the programme after the trial.

6. Data Protection and Ethics

All data collected will be processed in accordance with [summary of data protection policy and GDPR compliance]. [Add legal basis for processing personal data and special categories of personal data under GDPR]. Key roles include:

[Evaluator] will act as Data Controller for evaluation data.

[Delivery Partner] may act as a Data Processor or joint controller for delivery-specific data.

EEF evaluation data are processed by the Archive Manager under [GDPR Article] on the basis of legitimate interests. These include evaluating the effectiveness and long-term impact of educational interventions, improving research methods, and sharing findings for public benefit.

In addition, the name and work email address of the main signatory on this memorandum of understanding will be shared with the EEF, so they can share the study's findings with participating settings. For details on how the EEF processes and uses personal data, please see **their privacy notice.**

A Legitimate Interests Assessment has confirmed the necessity of processing and that the interests of data subjects are protected. All data subjects are informed and may withdraw from processing at any time without consequence.

At the end of the study, anonymised data may be archived with the EEF's secure data archive (ONS Secure Research Service). At this point, the EEF will become the data controller (for further information, see EEF's archive privacy notice). Further matching to National Pupil Database (NPD) and other administrative data may take place during later research.

No individuals (children, teachers, schools) will be identifiable in any published outputs.

Privacy notices and ethical approval information will be shared before any data collection takes place. [Add link to privacy notice]

7. Timeline

Month / Term	Activities
[e.g. Sep 2025]	Participant recruitment & MoU signed
[e.g. Oct 2025]	Baseline assessments & surveys
[e.g. Jan 2026]	Programme delivery begins
[e.g. Jun 2026]	Endline assessments & surveys
[e.g. Autumn 2026]	Feedback reports shared with participants
[e.g. Spring 2027]	Final report published on EEF website

8. Incentives and Support Provided

Training and materials (intervention group)
Programme support from the delivery team
Financial contributions for staff time or evaluation support
Optional prize draws or vouchers for participants or staff
Recognition of case-study participation

9. Responsibilities Overview

Participating Settings/Schools/Colleges Will:
Provide contact information for key staff.
Share relevant anonymised participant data securely.
Complete and return all surveys and evaluation forms.
Deliver the programme (if in the intervention group).
Facilitate all evaluation activities as scheduled.
Notify the delivery and evaluation teams of any issues or withdrawals.
Ensure any external staff visiting the setting are supervised and aware of safeguarding protocols.
Schools allocated to the control group should not take part in any other EEF trial delivered to the same year group(s) in the same subject [include any other eligibility criteria here].
Delivery Team Will:
Train and support staff delivering the programme.
Provide all necessary resources.
Be available for troubleshooting and implementation guidance.
Share anonymised safeguarding concerns with EEF if required.
Evaluation Team Will:
Randomly allocate settings and participants to trial groups.
Provide all necessary information and tools for evaluation activities.
Collect, process, and analyse data ethically and securely.
Publish anonymised findings.
Provide schools with links to the published report for the main study (expected in [date]) and the longitudinal study (expected in [date])

10. Safeguarding

Responsibilities of the delivery team

- Ensure that all members of the delivery team visiting the school are familiar with the school's safeguarding procedures and have received appropriate training on safeguarding protocols.
- Submit an anonymised safeguarding incident report to EEF covering any safeguarding concerns that have come up during the course of programme delivery.

Responsibilities of the independent evaluator

- Ensure that all members of the evaluation team visiting the school are familiar with the school's safeguarding procedures and have received appropriate training on safeguarding protocols.
- Submit an anonymised safeguarding incident report to EEF covering any safeguarding concerns that have come up during the course of the evaluation.

Responsibilities of all settings recruited to the trial

- Inform any members of the delivery team and evaluation team who are visiting the school about the school's safeguarding processes and provide details of the school staff member whom they should contact should a safeguarding disclosure need to be made.
- Ensure that members of the delivery team and evaluation team are never left unsupervised with children. A member of school staff should always be present to supervise activities.

11. Contact Information

Delivery Team Contact
[Name, Organisation, Email]
Evaluation Team Contact
[Name, Organisation, Email]

12. Agreement and Consent

I confirm that I have read and understood the information provided about the project, and I have passed a copy of the School Information Sheet to my school's designated named key contact. I have had the opportunity to ask questions and have had these answered satisfactorily.

I understand that if I withdraw my school from the trial and/or evaluation, unless otherwise instructed, [Evaluation Team] will use any data that has been collected up to that point in their analysis. Please note that data deletion will not be possible once data analysis has commenced (from [date]).

I understand that my school's participation is voluntary and that I am free to withdraw my school at any time. I will let [Delivery team] and [Evaluation Team] know if I choose to withdraw from the research.

I agree to either being assigned to the intervention or control group and am willing to comply with all evaluation activities.

I know who to contact if I have any concerns or complaints about the project.

My school will take part in this research and agrees to the conditions stated in the Memorandum of Understanding (MoU).

I confirm that I have read and understood the Memorandum of Understanding for the [Programme Name] evaluation. I agree to the conditions outlined and confirm our setting's participation in the programme and evaluation.

Setting/School/College Name: ____________________________
URN / Centre Number: ____________________________
Address: ____________________________
Name: ____________________________
Job Role: ____________________________
Headteacher/Principal Name: ____________________________
Email: ____________________________
Phone: ____________________________
Signature: ____________________________
Date: ____ / ____ / ______
Key Contact Name (if different): ____________________________
Email: ____________________________
Phone: ____________________________
Please read and complete all the above information and return this form to: [Email]

Appendix 7 | Parent/carer information sheet and withdrawal form checklist |

To include:	Further detail
Brief description of the project	
What's involved in the evaluation	Describe the randomisation design, what their child will be expected to do and when
How the data will be processed and stored	Include after the end of the evaluation
Explain that they do not need to act if they are happy for their child to participate	
Opportunity to withdraw	Signature, name, date
Link or attached privacy notice	
Contact details	

Appendix 8 | Privacy notice checklist |

To include:	Further detail
What the privacy notice aims to do	
What data will be collected and for what purposes	
What is the lawful basis for processing personal data and, separately, any special data (if used)	
Explicit reference to data subjects' legal rights according to GDPR, and how their individual rights are being protected	
All parties with access to this information, and for what purposes	
Data retention: how the data will be stored, for how long and for what purposes	Mention storage in the EEF archive at the end of the evaluation
International transfer: whether any personal information will be transferred outside of EEA	
Who to contact with a query or complaint (ICO and contact information for each team)	

To include:
What data is being shared?
Who is sharing the data?
What is the lawful basis of the recipient processing the data
By what means will the data be transferred? (e.g. secure network)
How will the data be stored and for how long?
Who will have access to and control of the data?
When and how will the data be deleted?
A link to the privacy notice that outlines how the data will be processed and stored
Contact details

Appendix 10 | Information map for essential documents |

Typically, documents [1] are produced first, followed by document [2], the data sharing agreement. Note that the same information is included on several of the documents. The depth of the explanation will differ depending on the target audience, i.e. the setting information sheet is intended to supplement the project page for settings. If they decide to proceed and participate, a detailed explanation of the project will be provided in the MOU.

Information Map

1

Brief explanation

Setting Information Sheet

- Project description
- Organisation details
- Programme description
- Eligibility criteria
- Evaluation details
- Benefits
- Costs
- Data protection
- Project timeline
- Contact details/Call to action
- Logos

Brief explanation

Parent Information Sheet

- Project description
- Evaluation explanation
- Data sharing and protection
- Participation/Withdrawal details
- Signpost Privacy Notice
- Contact Details

Detailed explanation

Memorandum of Understanding

- Programme description
- Organisation details (delivery & evaluation)
- Aims of evaluation
- Eligibility criteria
- Incentives & costs
- RCT explanation
- Project timeline
- Data protection
- Responsibilities of all parties
- Agreement details
- Signing box
- Contact details for all parties
- Logos

Privacy Notice

- Aims of notice
- Data collection & purposes
- Lawful basis for processing
- Data subjects' legal rights
- Parties with access to info
- Data retention
- International transfer
- Contact details

2

Data Sharing Agreement

- Who is sharing
- What data
- Purpose of sharing
- Lawful basis for processing
- Data transfer
- Data storage
- Length of storage
- Access & control of data
- When & how data will be deleted
- Linked privacy notice
- Contact details

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