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EEF Scaling Framework

A framework to support emerging and established interventions to deliver at scale in early years settings, primary and secondary schools, and 16-19 settings.

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Scaling Framework

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Glossary

Term	Definition
Adaptable/flexible components	Elements of a programme that can be adjusted or that are optional, so that the programme fits well in a setting – without losing core elements that make the programme effective. Flexible/adaptable components should be predefined, and guidance provided on the parameters of acceptable adaptation.
Alignment	The extent to which a programme fits (e.g. within a setting or within the wider education policy context). This includes fit with e.g. capacity, local and national priorities and existing practices/norms.
Capacity building	Developing the skills and knowledge of a team to successfully carry out required tasks.
Context	The setting, local or national level factors that affect programme implementation. E.g. setting infrastructure, staffing, culture and leadership; local demographics and networks between schools; national policy, funding, workforce training.
Core components	The essential features of a programme that are expected to influence the intervention’s success if implemented successfully and without which the intervention would be expected to be less effective. These should remain central to delivery during scaling to ensure effectiveness.
Delivery model	The structured process through which a programme is delivered and supported, including the form that training takes.
EEF evaluation pipeline	The EEF’s staged approach to evaluating educational programmes, progressing in order: Innovation, Pilot, Efficacy, Effectiveness, and Scale-up.
Effectiveness stage	The fourth stage in the EEF evaluation pipeline. This is when a programme is tested using RCT or QED methods in large-scale, real-world conditions to determine impact before full scaling.
Efficacy stage	The third stage in the EEF evaluation pipeline. This is when a programme is rigorously tested using RCT or QED methods under optimal delivery conditions to determine impact.

Term	Definition
Equity	EEF programme teams should consider how to ensure the programme is accessible and beneficial to all pupils, particularly those from socioeconomically disadvantaged backgrounds.
Feasibility	The extent to which a programme can be delivered as intended in educational settings. Feasibility is influenced by factors such as resources, staff capacity, and acceptability of the programme to pupils and school staff.
Fidelity	The degree to which a programme/intervention is implemented as intended or as prescribed.
Flexible/adaptable components	Elements of a programme that can be adjusted or that are optional, so that the programme fits well in a setting – without losing core elements that make the programme effective. Flexible/adaptable components should be predefined, and guidance provided on the parameters of acceptable adaptation.
Implementation	The process of putting a programme into practice and sustaining it. It involves planned, intentional activities including identifying who needs to do what, preparing staff, identifying how a programme fits into existing practices, and making available the required resources, and providing necessary supports.
Innovation stage	The first stage in the EEF evaluation pipeline. This is when delivery teams develop an idea into a programme, including small-scale delivery and formative feedback.
Intervention/programme	A package of support for children and/or for educators in schools, early years settings or 16-19 settings to make changes to their teaching, with the aim of improving children’s learning outcomes. This will usually take the form of a professional development programme for educators, or training, support and resources that enable educators to deliver specific activities with children.
Meaningful proportion/meaningful scale	When a programme reaches a proportion of the population, need or demand to make a socially meaningful impact. This can’t be defined in numerical terms since it depends on the programme’s target group and the wider context.
Pilot stage	The second stage in the EEF evaluation pipeline. This is when a programme is tested in a small number of settings to understand the process of implementation, evidence of promise, and potential to scale.

Term

Definition

Programme/intervention	A package of support for children and/or for educators in schools, early years settings or 16-19 settings to make changes to their teaching, with the aim of improving children's learning outcomes. This will usually take the form of a professional development programme for educators, or training, support and resources that enable educators to deliver specific activities with children.
Quasi-experimental design (QED)	An impact evaluation method which includes a well-matched but non-random comparison group against which the intervention is tested.
Randomised controlled trial (RCT)	An impact evaluation method where participants (or settings) are randomly assigned to receive the intervention or to a control group, to establish programme impact.
Scale up stage	The fifth stage in the EEF evaluation pipeline. This is when a programme is implemented at national or large-scale to understand its sustainability and impact.
Scaling dimension	There are six scaling dimensions in this framework, each a key area of focus for scaling. Dimensions 1, 4, 5 and 6 are broken down into sub-dimensions for clarity and ease of use.
Scaling indicator	Each scaling dimension includes one or more indicator (or criterion) against which a programme can be assessed for scaling. The indicators are set out in relation to each stage of the EEF evaluation pipeline.
Stakeholder	Any individual, group or organisation that is interested in or affected by the relevant programme/intervention. E.g. pupils, setting staff, national interest groups, potential partners, funders, and policymakers.
Sustainable/sustainment	The viability of a programme to be delivered in the long-term, beyond evaluation funding or intensive support, and to continue being effective.
Theory of change	A structured diagram or written description of how a programme is intended to achieve its intended outcomes. The structure varies but they usually involve inputs and activities, outcomes, and mechanisms of change, and may also involve enabling conditions and assumptions.

Introduction to the framework

This framework sets out what it takes to scale an educational programme, by mapping out key considerations and activities involved.

- The framework is based around **six key scaling 'dimensions'** or sets of considerations. These were compiled based on a review of existing evidence-informed scaling guidance resources, learning from EEF scaling evaluations, and input from EEF staff.
- For each dimension, we provide an explanation of what it involves and why it is important.
- Dimensions 1, 4, 5 and 6 are broken down into sub-dimensions for clarity and ease of use.
- Within each dimension, we have set out the key considerations in relation to the five [stages in the EEF evaluation pipeline](#): Innovation (part of EEF's early-stage programme development work), Pilot, Efficacy trial, Effectiveness trial and Scale-up.
- For each EEF evaluation pipeline stage, we set out one or more indicators which describe what will ideally have been done or ascertained in terms of scalability, for the intervention to be ready to **start work** at that pipeline stage.
- The indicators are **cumulative**. This means that at each pipeline stage, the assumption is that the indicators listed at all previous pipeline stages have been met. At each stage, the framework only shows the new requirements and does not repeat earlier indicators. This means that if a previous indicator has not been met, it is likely that some work will be needed in the current stage to address it.

EEF hope this framework will be used by grantees to **assess their programme's scalability and plan further work**, and to understand the expectations for scalability at each stage of EEF's evaluation stages.

- Not all indicators will be appropriate for all projects. EEF also recognise that there is variation between types of delivery organisation in terms of their size and purpose and the access they have to funding, prior development/evaluation work completed, skills in the team and other resources. There are therefore differences in what can realistically be expected in terms of the work completed by the start of each stage.
- In some cases, it may be more appropriate for any required work to be done early in the evaluation stage rather than in advance of the start of the stage.
- The framework is intended to help programme teams and EEF identify where development work is needed to support programme scalability, rather than to provide a 'binary yes or no' judgement of readiness to scale.
- At each stage, the relevant plans, deliverables and documents are expected to have been refined based on prior development work. They will also be refined further based on the learning that arises from the next evaluation stage.
- EEF is developing further practical resources on supporting grantees to effectively scale their programmes. Current resources can be found here: [Support to help projects grow | EEF](#)

How was this framework developed?

This framework was created with close collaboration with the EEF at all stages of development.

The framework was developed in four stages:

1. We selected eight scaling frameworks or resources which are relevant to EEF's work and are empirically supported. We conducted a rapid review and synthesised their content. We also incorporated learning from EEF's scaling evaluations and other reports on scaling.
2. We used this synthesis and discussion with EEF to identify the dimensions and indicators.
3. We piloted the framework with currently funded EEF delivery teams, EEF programme managers, and EEF evaluators.
4. We refined the framework based on feedback from the piloting and developed a self-assessment tool to be used alongside the framework by programme delivery and development teams.

For a full list of the documents reviewed in the development of the framework, please see the Appendix.

Dimension 1: Level of programme development

To be scalable, programmes need to be developed comprehensively for delivery, including:

- A theory of change: although formats will vary, these will document the problem being addressed; a defined target population; inputs and activities; outcomes (which may be phased and for different key groups); mechanisms of change; enabling conditions and assumptions, and potential unintended consequences
- Documentation supporting delivery, e.g. a programme manual
- Training package or resources including guidance for trainers
- Implementation support arrangements including guidance for staff, with consideration given to continued support for sustained delivery (e.g. top-up training or continued access to resources)
- Where relevant, identifying core components and those that are optional or can be adapted
- Setting out the parameters of acceptable adaptation, since adaptation and flexibility are essential for scaling
- Systems for monitoring delivery and fidelity, including adherence and quality, which can be scaled outside the context of an evaluation.

These components will be developed, tested and refined throughout the evaluation pipeline. Simplification of the programme content and/or delivery approaches is often also needed, to reduce complexity and burden and increase usability.

In general, it is helpful if the programme model and the delivery approach that will be required for scale (e.g. use of train the trainer approaches, or online/hybrid training and support) is developed and tested as early in the pipeline stages as possible. However, this is not always possible, and sometime the model tested at the efficacy stage is not the model that would be used at scale. This will depend on the research questions being addressed (e.g. the focus of an efficacy trial may be to test the programme theory), whether the necessary changes have been evidenced, how substantial they are, the costs and effort involved in making them, and the value and risk of further testing before making these changes. However, EEF would always expect to be evaluating a fully scalable programme model at the effectiveness trial level. This is because when substantial changes are made to programme delivery models to improve scalability, e.g. between efficacy and effectiveness, it is common to see programme effects reduce ('voltage drop'). The effectiveness trial needs to test the model that would be scaled.

It should be clear how the programme (whether it is a targeted intervention or a whole class approach) will address improving academic outcomes for socioeconomically disadvantaged children and young people, in line with EEF's core mission.

Dimension 1 is presented in two sub-dimensions: D1.1 Programme development and D1.2 Quality assurance.

D1.1 Programme development

- | | |
|------------|---|
| Innovation | <ul style="list-style-type: none">● The programme aims are well defined, including an initial rationale for how it will improve outcomes for children and young people (including for socioeconomically disadvantaged children and young people), that is supported by theory and/or wider evidence.● Work to establish key programme activities (including any training and ongoing supports) has begun. |
| <hr/> | |
| Pilot | <ul style="list-style-type: none">● The programme logic is clearly documented in a full theory of change, including anticipated mechanisms of change, which is supported by initial evidence (i.e. setting feedback and delivery reflections). Further evidence may be needed to understand whether the causal assumptions are likely to hold.● The programme is well defined and documented, including a clear definition of the core delivery components, with no need for substantial development work for delivery in a pilot evaluation, although may require minor development work.● Materials required to deliver the programme (for training, ongoing support, and delivery) have been developed with input from user engagement work, and the programme is ready to be delivered in full in a small number of settings.● The delivery team can identify features of their programme that may or may not be suitable for the selected potential scaling pathway(s) (see also D3: Scaling vision and D6: Market considerations). |
| <hr/> | |
| Efficacy | <ul style="list-style-type: none">● The programme has been refined and streamlined where necessary, based on prior evaluation findings, and does not require further development work for delivery in an efficacy trial. The core and adaptable components have been clearly defined, and the anticipated boundaries of adaptation are described, subject to new learning from the efficacy trial.● The programme is appropriate for the selected pathway to scale (see D3: Scaling vision). If the efficacy trial delivery model differs from this anticipated model for delivery at scale, there is a clear rationale for this.● Materials and resources to support delivery (e.g. training package and manual) have been tested and refined with the relevant user group. |

D1.1 Programme development

- The need for continued implementation support for sustained impact has been considered and addressed, e.g. building in ‘top-up’ training and ongoing access to delivery resources.
 - Careful consideration has been given to delivery workforce capacity, skill, knowledge, and motivation to deliver the programme.
 - The theory of change is supported by prior evaluations of the programme and/or evaluations of similar approaches, including:
 - how it improves outcomes for socioeconomically disadvantaged children and young people and has potential to close the attainment gap
 - how it is distinct from existing practice
 - how it achieves the intended outcomes via the proposed mechanisms of change (for example, demonstrated through intermediate outcomes)
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- Effectiveness
- The programme has been refined and streamlined, as needed, and permitted adaptations (i.e. flexible components of the programme that can be adjusted for implementation in different setting contexts) have been specified based on prior rigorous evaluation findings. The programme does not require development work for delivery in an effectiveness trial, though further changes may be identified over the course of the effectiveness trial.
 - If necessary, the programme model has been adapted further for delivery at greater scale, but the programme retains the core components that have been identified as driving impact.
 - The programme model is aligned with the selected pathway to scale (see D3: Scaling vision) and appropriate for the level of knowledge, skill, and motivation in the available workforce.
 - The theory of change is supported by prior rigorous evaluations of the programme (which include a well-matched or randomised control group) and provide evidence for achieving the intended outcomes.
 - Any necessary modifications have been made to the continued support available to settings to sustain implementation (e.g. top-up training or continued access to resources).
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- Scale up
- The programme has been further refined based on evidence from an effectiveness trial, is fully manualised, and can be implemented as intended by the delivery partnership. This includes ensuring that the core components identified as driving impact are retained at scale, and that effective permitted adaptations are specified.

D1.1 Programme development

- The resources to support sustained delivery are available as part of the scale up trial.
- There are plans in place for continuous learning about how the programme and permitted adaptations work for different populations.
- There is a process in place to periodically review, adapt and refine the programme content and delivery model to address changes in policy, stakeholder interests, identified markets, and available funding.

D1.2 Quality assurance

Innovation ● No requirements.

Pilot ● Criteria for fidelity (adherence and characteristics of high-quality delivery), with measurable indicators, have been documented.

● A viable plan is in place to, 1) support implementation as intended and 2) collect the necessary information to monitor quality and fidelity of delivery.

Efficacy ● Detailed criteria for fidelity (adherence and high-quality delivery) with measurable indicators have been documented based on prior evaluation findings, including, if relevant, reference to the core and adaptable components.

● The implementation support and monitoring processes (including a viable plan for monitoring data collection) have been refined based on prior delivery experience and/or evaluation.

Effectiveness ● Criteria for fidelity (adherence and high-quality delivery) with measurable indicators have been refined based on prior rigorous evaluation. These criteria are used to maintain fidelity to programme design when delivering at scale, ensuring that the core components identified as driving impact are not deprioritised or subject to unplanned changes. The criteria may be further developed based on learnings from the effectiveness trial.

● The implementation support and monitoring systems are robust and can be sustained outside the context of evaluations.

D1.2 Quality assurance

- Processes are in place to collect and analyse delivery data that can be disaggregated by relevant indicators of disadvantage, to facilitate insight into programme delivery in diverse contexts.
 - Processes are in place to monitor the appropriateness of the implementation support, monitoring, and data analysis systems and refine them as necessary to address arising changes to policy, populations and delivery contexts, and to address existing and arising equity issues.
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Scale up

- The implementation support model is suitable for use at scale and its use in different populations/contexts is understood.
- The monitoring and data analysis systems are suitable for use at scale, outside of evaluation context. There is a system for regularly reviewing monitoring and delivery data and making programme refinements as necessary. Easy-read reports can be produced to support settings to understand the quality of their delivery and impacts for pupils.
- There is a plan in place to periodically review and update these systems to ensure they are effective with minimal burden to settings and trainers.

Dimension 2: Feasibility and acceptability for education settings

To be scalable, programmes need to align or fit with setting contexts, and to be viewed and experienced as feasible and acceptable by settings and children and young people. If not well aligned, programme take-up will be limited, the quality and integrity of delivery will be compromised, and the programme will not be sustainable. The relevant aspects of setting contexts will vary and include:

- Priorities and recognised needs
- Established ways of working, operating processes, preferences, norms, and cultures
- Workforce capacity: including skills, knowledge, motivation, and time
- Aspects of the setting infrastructure: equipment, IT capabilities, physical space, timetables
- The wider community (e.g. Multi Academy Trust (MAT) or local families) may also be relevant.

The programme needs to fit within these parameters, and programmes that are too onerous or complicated for the context or that require substantial changes to established ways of working will face barriers in scaling.

Over time, programmes need to be tested in a range of setting contexts including those relevant to disadvantage and adapted iteratively to ensure it will reach the settings and children and young people that are its target.

D2 Feasibility and acceptability

Innovation	<ul style="list-style-type: none">● No obvious areas of significant misalignment between the expected programme activities and setting contexts have been identified.
Pilot	<ul style="list-style-type: none">● The programme has been developed with some involvement of intended users or relevant representatives such as teachers (through co-design, consultation or feedback).● The programme has been refined to increase alignment with setting contexts based on formative feedback from delivery in a small number of settings.● No significant barriers or challenges to implementation have been identified between the programme and setting contexts in previous development and early testing work, including for settings serving a higher-than-average proportion of socio-economically disadvantaged children and young people.

D2 Feasibility and acceptability

- Outstanding issues to resolve or test in relation to feasibility and acceptability have been identified.
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Efficacy

- The programme has been shown to be feasible and acceptable (with minor amendments) to settings via prior formative evaluation (e.g. pilot evaluation or implementation process evaluation).
 - The programme has been refined to address potential issues regarding alignment, feasibility and acceptability if identified in previous evaluation (see D1.1 Programme Development).
 - There is an initial understanding of the setting conditions and characteristics that support the successful delivery of the programme (e.g. setting capacity, culture, priorities), subject to further learning.
 - Adjustments have been made as necessary, with involvement of intended users, to ensure the programme is feasible and acceptable for socioeconomically disadvantaged children/young people.
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Effectiveness

- Prior rigorous evaluation provides positive evidence for the feasibility and acceptability of the programme including for settings serving a higher-than-average proportion of socio-economically disadvantaged children/young people.
 - Prior evidence demonstrates that the programme has been implemented with fidelity (including adherence and high-quality delivery).
 - Feasibility, acceptability and alignment to setting contexts have been strengthened in any programme refinements based on previous evaluation learning (see also D1.1 Programme development).
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Scale up

- Prior rigorous evaluation provides positive evidence for the feasibility and acceptability of the programme in heterogenous delivery contexts (e.g. geography, urban or rural, setting performance) including settings with a higher-than-average proportion of socio-economically disadvantaged children/young people.
- Prior evidence demonstrates that the programme has been implemented with fidelity (including adherence and high-quality delivery) in heterogenous delivery contexts including settings with a higher-than-average proportion of socio-economically disadvantaged children/young people.
- The programme has been refined to ensure alignment to relevant settings and contexts based on previous evaluation learning (see also D1.1 Programme development).

D2 Feasibility and acceptability

- There are processes in place to periodically review alignment, including robust processes for ongoing feedback from settings, which can clearly support programme refinements to increase alignment with changing or arising setting needs.

Dimension 3: Scaling vision and strategy

There needs to be clear intention on the part of the delivery team organisation to work towards a meaningful level of scale. Meaningful scale will vary by programme and target population but generally entails meeting a sufficient proportion of need and demand to be able to make a socially meaningful impact. Delivery teams will need a strategy for reaching the intended level of scale but the form that scaling will take will vary by intervention and delivery organisation and there are a number of possible pathways to scale. The main pathways are listed below. Scaling pathways include:

- Expansion: the delivery team organisation expands its capacity to deliver at scale, or restructures or adds e.g. by forming a new department or team within the existing organisation
- Spin-out: a new organisation is set up to deliver the programme at scale
- Partnership: the delivery team works with partners who support delivery at scale
- Third party acquisition: the programme is taken on by another organisation (or partnership) with capacity to deliver at scale
- Centrally managed replication: e.g. through licensed trainers or organisations operating under a franchise to deliver the programme
- Open source: the programme is made available for self-supported delivery via a website and support resources
- Government adoption: the programme is taken in by government, e.g. incorporated into the national curriculum as a required approach to teaching or incorporated into professional development requirements.

The optimal or most viable pathway may not be immediately obvious to delivery teams. Delivery teams will need to consider a range of factors, including:

- The purpose, capacity, and usual work of the delivery team organisation: this will influence which pathways they are well set up for
- The complexity of the programme: more complex programmes are likely to require more continued oversight, making open source less viable
- The scope to ensure high fidelity and impactful programme implementation: more limited if the scaling pathway is open source or government adoption. Government adoption may be more appropriate for an overall pedagogy rather than for a specific programme.
- The existence and type of potential partners or third parties

- The funding model: and the commercial realities or need for subsidy this implies, which may limit the pathways available
- The policy landscape: which particularly influences the scope for government adoption.

Whatever the pathway chosen, key to successful scaling is iterative planning, documenting the work required to move to scale and how and when it will be taken forward. This is likely to cover aspects of all the dimensions in the Framework, but particularly key are:

- The intended scale of delivery, and the types of settings in target
- The business strategy/organisational purpose of the delivery organisation
- Organisational capacity requirements and resources, including intellectual property rights
- Marketing strategy
- Development of partnerships and stakeholder engagement
- Costs of development work and how they will be financed

D3 Scaling vision and strategy

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| Innovation | <ul style="list-style-type: none"> • The delivery team has a general understanding of what it means to scale a programme, is motivated to create a programme that could eventually operate at a meaningful scale and is open to refining their programme based on feedback from EEF and delivery settings. • The delivery team documents their current organisational context (e.g. usual work, size, capacity, goals) and is aware that they may need to consider the above pathways to deliver at scale in the UK education system in the future. • The delivery team intends to reach socioeconomically disadvantaged children and young people, by particularly focusing on harder to reach demographics and geographies. |
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| Pilot | <ul style="list-style-type: none"> • The delivery team has clear long-term objectives for the programme (i.e. beyond the context of funded evaluations) that involve it reaching a meaningful proportion of the target population (beyond local area) including disadvantaged children and young people. • The delivery team is aware of potential pathways to scale and has identified one or more plausible pathways to scale that align with their organisational strategy/purpose. There is a plan for the delivery team to establish which of these pathways are viable by the end of the pilot phase in line with evaluation findings. • There is a high-level plan for scale with key actions assigned to named team members to progress the preferred pathway(s) to scale (e.g. programme refinement, talking to relevant government stakeholders or delivery partners, |
|-------|--|

D3 Scaling vision and strategy

proposed marketing plan). This should include an estimated timeline for the programme to reach a meaningful proportion of the population.

Efficacy

- The delivery team has selected a preferred pathway to scale that appears viable based on insights from prior evaluation and other analysis and aligned with the organisational strategy/purpose.
 - The delivery team has taken initial steps to prepare for the preferred pathway to scale (programme adaptations, developing partnerships or establishing relationships with stakeholders, market analysis, and developing the appropriate training model for implementation at efficacy trial and larger scale; see also D6: Market considerations).
 - There is an initial plan for scale for how to secure the preferred pathway. This details some short-term actions required by the end of the efficacy trial as well as anticipated longer-term actions (i.e. beyond an effectiveness trial) required to achieve meaningful scale. This should include:
 - An initial estimate of the timeline to intended scale
 - An initial estimate of the human (workforce requirements), technical (e.g. materials, technologies, infrastructure, systems) and financial resources that will be needed for scaling the intervention
 - Preferred position on intellectual property rights
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Effectiveness

- Delivery team has taken tangible steps towards one or more viable pathways to scale.
- Delivery team has put in place any delivery partnerships needed for delivery at effectiveness trial, and their appropriateness for further scale will be reviewed as part of the trial.
- There is a plan for scale based on insights from prior delivery and evaluation which is relevant to the selected pathway. This should include:
 - Refinement of elements described at efficacy scale
 - An initial marketing strategy; plans to inform and attract potential settings
 - Tangible steps to reach socioeconomically disadvantaged settings
- Actions have been taken to put in place the human (workforce requirements), technical (e.g. materials, technologies, infrastructure, systems) and financial resources that will be needed for operating at scale.

D3 Scaling vision and strategy

Scale up

- There is a detailed plan for sustainable delivery including to maintain focus on areas of disadvantage.
- The scaling strategy is being delivered and remains a core priority of the delivering organisations.
- There are processes in place to periodically review and refine the scaling strategy to ensure ongoing suitability of the delivery model for the national delivery context.

Dimension 4: Capacity of lead organisation/s

A key constraint on scaling is the capacity and skills of delivery teams, including any delivery partners, to support and sustain the programme at scale. The capacity required is likely to involve:

- The human resources required to develop and run the programme: experts in the programme content, managers, trainers, coaches etc. as well as committed organisational leaders.
- Operational expertise and resources: e.g. marketing, legal, technical, financial, policy advocacy.
- The capacity, credibility and networks needed for wide geographic reach and for targeting disadvantage.
- The financial resources to fund development and ongoing costs, which might be provided internally or secured from elsewhere e.g. from a foundation or other funder (Costs at the point of delivery are included in Dimension 6).
- Organisational infrastructure: e.g. premises, equipment, software, operating processes e.g. CRM systems.

The stability of organisations is also an important factor. Organisational capacity for scaling may already be in place (e.g. in an organisation that runs other programmes at scale) but will often grow alongside opportunities to scale. There is a need to be alert to the risk that scaling one programme, even if well-funded, can destabilise an organisation if the scale of investment secured and infrastructure requirements are disproportionate to the other work of the organisation.

Capacity for scaling work may be constrained by the size and purpose of a delivery or development team, and capacity building or partnership work may be needed.

Dimension 4 is presented in two sub-dimensions: D4.1 Staff, people, skills and D4.2 Systems and infrastructure.

D4.1 Staff, people, skills

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- Innovation
- The delivery team has the capacity, skills, and knowledge for the required innovation work, such as recruiting education settings and designing and implementing new activities or approaches.
 - Lead personnel are committed to high-quality implementation and are willing to explore what approaches to scaling could work.

D4.1 Staff, people, skills

Pilot	<ul style="list-style-type: none">● The delivery team has the capacity, skills and knowledge required for piloting the programme. Team size and capacity are stable, and the organisation is committed to supporting programme development and scaling.● The delivery team has a plan for establishing the necessary capacity, skills, and knowledge for the potential pathway(s) to scale (e.g. hiring and development strategy), including to reach socioeconomically disadvantaged children and young people (e.g. expertise, networks).
Efficacy	<ul style="list-style-type: none">● The delivery team has a plan to ensure the capacity, skills, and knowledge to scale and sustain the programme are in place (including through capability building, adding to the team, or partnership). This includes expertise in legal, financial, marketing, developing training resources and online materials and reaching and working in different contexts and with disadvantaged populations.● The availability of required trainers for the relevant delivery model in the market is confirmed.● There is an established organisational commitment to scale and sustain the programme as a core priority. If the organisation is not set up to deliver at scale, relevant partners have been identified and approached.
Effectiveness	<ul style="list-style-type: none">● The delivery team and any delivery partners have the capacity, skills and knowledge to scale and sustain the programme.● There is a strategy in place to sustain the delivery team capacity, skills, and knowledge as a core priority of the organisation and to review capacity requirements, as necessary.
Scale up	<ul style="list-style-type: none">● There is a strategy in place to sustain the resources required to deliver the programme at scale beyond the funded evaluation period.

D4.2 Systems and infrastructure

Innovation	<ul style="list-style-type: none">● The anticipated resources (as described in the introduction to Dimension 4) required for the innovation stage are established or obtainable by the delivery team.
Pilot	<ul style="list-style-type: none">● The resources and infrastructure (systems, operational capacities, equipment, software, processes, networks) required to deliver the pilot are in place.● Upfront and running costs for the delivery organisation(s) have been estimated and there is a willingness to explore potential internal or external sources of funding beyond the pilot.● The delivery organisation is financially stable. The scale of EEF funding is in scope and will not destabilise the organisation.
Efficacy	<ul style="list-style-type: none">● The infrastructure required for delivery at efficacy trial is in place and has been refined and simplified based on prior delivery and evaluation for ease of use at scale. This infrastructure is (or there is a plan to make it) sufficient for delivery beyond efficacy trial scale (i.e. more than 50 settings).● Continued costs for the delivery organisation(s) are estimated and there are potential internal or external sources of funding identified beyond the efficacy trial.● Scaling will not financially destabilise the organisation.
Effectiveness	<ul style="list-style-type: none">● The programme infrastructure has been refined for delivery at and beyond effectiveness scale (i.e. a meaningful proportion of settings that would support achieving impact for disadvantaged children and young people) with viable plans in place to sustain delivery at scale.● Set up and running costs have been estimated, with potential internal or external sources of funding identified for delivery at scale, outside the context of an evaluation.● The systems, infrastructure and funding required are demonstrably sustainable. They may be revised based on ongoing learnings from the effectiveness trial.
Scale up	<ul style="list-style-type: none">● The systems, infrastructure and funding required are demonstrably sustainable and support achieving impact for socioeconomically disadvantaged children and young people.● There are processes in place to periodically review and update the required infrastructure to ensure ongoing suitability for the national delivery context.

Dimension 5: Policy context and stakeholder engagement

The quality of the 'fit' of the programme or its alignment with the wider education system and policy context is key to scaling up. Key aspects of this wider context are:

- Government priorities
- The national curriculum
- Regulation, inspection, and accountability frameworks (particularly Ofsted)
- Student assessment systems
- Regional and MAT priorities
- Relevant setting priorities (early years settings, schools, or 16-19 settings)
- Other national and regional initiatives e.g. professional development initiatives

Scaling programmes involves ensuring that the alignment (i.e. fit or compatibility) is as strong as possible and recognising that priorities and climates shift over time. However, a programme might be deliberately and consciously at odds with prevailing priorities, for example if it addresses a problem about which there is limited awareness or that is poorly addressed, or actively stems from, aspects of the prevailing policy context. In this case, the solution might be not to adapt the programme, but to carry out other work, as part of the scaling strategy, to raise awareness of the importance of the issue the programme addresses or to influence policy priorities.

This means that alignment is a very dynamic process, which involves designing and adapting the programme and the scaling strategy to fit a changing education system and policy context but also influencing the education system and policy context – and the actors within it – so that it becomes and remains supportive of the programme. So wider context alignment requires continuous attention throughout a programme's scaling journey.

Stakeholder engagement is a key part of addressing wider system alignment, and scaling is aided by having advocates in the wider system who promote the programme or the issue it addresses. Building and sustaining a constituency of stakeholder support, including working through collaborations and partnerships, will be important. Key stakeholders will vary and may include:

- Education settings (early years, school, 16-19), particularly leading schools and MATs
- Sector lead organisations
- Professional development bodies
- Special interest groups (relating to aspects of education, teaching, disadvantage etc.)
- Local and national government and associated bodies
- EEF's Research Schools Network
- Leading academics and other influential individuals.

Dimension 5 is presented in two sub-dimensions: D5.1 Compatibility with policy context and D5.2 Stakeholder support and engagement.

D5.1 Compatibility with policy context

Innovation ● A hypothesis is articulated about how the programme aims to fit in the wider policy context.

Pilot ● There is an understanding of how well aligned the programme is with the national policy context, potential barriers to implementation in the UK education system have been identified and plans to address areas of divergence are underway.

● A convincing claim can be made that the programme is broadly compatible with the policy context.

● If the programme is knowingly not aligned with current policy priorities, there are plans to address this (e.g. stakeholder engagement to raise policy awareness of issue addressed, see D5.2) during the pilot stage.

Efficacy ● Prior delivery has demonstrated that the programme and the wider scaling strategy are not incompatible with the policy context.

● A strategy is in place to monitor the sector and policy context with awareness of current and potential developments that might affect alignment and implications for programme development (see also D6: Market considerations).

● Actions (e.g. awareness raising) are underway to mitigate any potential areas of misalignment identified. This includes where the programme is knowingly misaligned with current policy priorities (see also D5.2 Stakeholder support)

Effectiveness ● Prior evaluation and delivery have demonstrated that the programme and the wider scaling strategy are compatible with or have the potential to be compatible with the sector context.

● A sustainable strategy is in place to monitor and analyse the relevant sector and policy context and climate. Appropriate actions are identified as needed to strengthen alignment and address arising barriers to scale.

Scale up ● A sustainable policy monitoring strategy is being implemented, with mechanisms for ongoing review. Mitigating actions taken are sustainable.

D5.2 Stakeholder support and engagement

Innovation

- A plan is in place to engage intended users (settings, children/young people, MATs) and any other key stakeholders in the programme design process and keep them informed about the programme.

Pilot

- Initial stakeholder identification has been undertaken, including the organisations, groups, or individuals that are likely to affect the prospects of scaling the programme and understanding their interests and priorities. This should include those most influential with regard to addressing the needs of socioeconomically disadvantaged children and young people.
- Work is underway to engage relevant stakeholders during the pilot stage, including potential funders, delivery partners or government adopters, particularly if the issue addressed by the programme is less well known.
- No major/insurmountable sources of opposition have been identified.

Efficacy

- Stakeholder mapping and analysis has been completed, and no major/insurmountable sources of opposition have been identified.
- There is a plan to engage key stakeholders to secure their support for and reduce opposition to the programme, including by addressing their key concerns regarding the programme and scaling strategy (see also D6: Market considerations).
- If the programme is knowingly not aligned with current priorities, key stakeholders are being engaged to address this.

Effectiveness

- Actions have been undertaken to address opposition and increase buy-in, as identified in prior analysis.
- A stakeholder engagement plan is being implemented to mobilise support for the programme and address areas of potential opposition or friction.
- Stakeholders are actively advocating for the programme.

Scale up

- A stakeholder engagement plan is being implemented to sustain support and address potential changes or sources of opposition is in place.
- Stakeholders are actively advocating for the programme and its scale up.

Dimension 6: Market considerations

Scaling requires consideration of a range of aspects relating to markets – the supply of and demand for setting support – which may be less familiar territory to some delivery teams. Delivery teams may want to consider how to access specialist expertise, build capacity or form partnerships to skill up in this area.

Scalable programmes are ones which can be differentiated from, and have relative advantage over, what is currently available to settings. In other words, they need to have features that would make settings choose them over existing solutions. They need to be filling a gap or to be doing something better than what is currently available, for example because they are more effective, more comprehensive, simpler, cheaper, more feasible, more credible, or in other ways more attractive. This means that scaling will involve thorough competitor analysis of offer and pricing. If they do not address a widely recognised need, they will need to plan for awareness raising work so that the need is recognised.

Scaling also requires a clear sense of the types of settings that are in target, with a particular focus on addressing disadvantage. Few programmes are likely to be needed or effective everywhere and having a clear sense of the settings for which the programme is intended is important for understanding the market and tailoring the programme and marketing. Alongside this, scaling requires an assessment of the size of the potential market (the number of settings or pupils meeting target criteria) and the proportion that the delivery team intends to reach, and assessment of the capacity required to do this (Dimension 4). Although having some choice is important because it enables settings to select the programmes that best fit their context and needs, numerous programmes doing similar things, each able to address only a fraction of the need, can lead to wasted resources. As noted in Dimension 3, for programmes to achieve meaningful impact at population level, they will need to address a meaningful proportion of need and demand. A marketing strategy will be needed, including plans for reaching settings (recognising that reaching disadvantaged settings and pupils is likely to require specific activity and costs).

Sustainable scaling also requires the programme to be available at a viable cost to settings at the point of delivery. The budgets and priorities of schools and settings are particularly relevant, as is ensuring that the programme is financially viable for settings with a high proportion of socioeconomically disadvantaged children and young people. This may mean simplifying the intervention or amending the delivery method to make it feasible at an appropriate cost. EEF encourages settings to use their pupil premium funding to purchase programmes that support high quality teaching and provide high quality targeted support to pupils¹.

If it is not possible to make the intervention affordable for settings through amendments to the programme and delivery method, an additional or alternative funding source that is sustainable

¹ [The EEF Guide to the Pupil Premium | Education Endowment Foundation](#)

needs to be identified to subsidise it. There have been instances in the past where the DfE have subsidised the take up of EEF evidenced programmes (for example Nuffield Early Language Intervention², Maths Champions³) at scale. However, however this is not a guaranteed source of funding and delivery organisations will need to identify sustainable models in the long-term and outside the context of evaluations.

The evidence required for assessing indicators in this dimension is likely to come from evaluation evidence (including data and experiences concerning setting recruitment) but will also come from delivery teams' own market analysis, market research and other intelligence-gathering.

Dimension 6 is presented in three sub-dimensions: D6.1 Demand and differentiation, D6.2 Target market, and D6.3 Pricing strategy.

D6.1 Demand and differentiation

Innovation	<ul style="list-style-type: none">● The programme aims to address a challenge faced by settings that is reasonably widespread, including the aim of improving outcomes for socioeconomically disadvantaged children and young people.
Pilot	<ul style="list-style-type: none">● Prior work indicates that settings and other target groups, especially those with a high proportion of socioeconomically disadvantaged pupils, recognise the identified challenge as a priority and are seeking support to address it. Where a need has been identified but is not recognised by settings, plans are in place for awareness raising (see also D5.2 Stakeholder support and engagement).● Initial analysis has been undertaken and indicates that the programme is differentiated from existing solutions or usual practice or adds to the range of existing programmes if few are available. The programme's strengths and weaknesses compared to others have been described.
Efficacy	<ul style="list-style-type: none">● Prior analysis indicates that the programme meets a recognised priority need of settings, especially settings with a high proportion of socioeconomically disadvantaged children and young people, and that a reasonable proportion of settings would take up the programme if offered.● Previous development has provided an understanding of the characteristics of settings that are likely to take up the programme (e.g. in terms of geography, setting budget, setting population, Ofsted rating etc).

² [Nuffield Early Language Intervention \(NELI\) - Reception | EEF](#)

³ [Maths Champions - scale-up evaluation | EEF](#)

D6.1 Demand and differentiation

- Based on prior delivery and evaluation, the programme is anticipated to offer relative advantages compared to existing programmes (e.g. cost, training burden, potential impacts).
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- Effectiveness
- Prior evaluation and analysis provide positive evidence that there is demand for the programme and it is perceived favourably compared to existing programmes, including by settings and other target groups with a high proportion of socioeconomically disadvantaged pupils.
 - A detailed analysis has been conducted of the characteristics of settings that are likely to take up the programme.
-

- Scale up
- Prior evaluation and analysis provide robust evidence that the level of demand for the programme is in line with intended reach (see also D3.1 Delivery team intention and plan for scaling), including among settings with a high proportion of socioeconomically disadvantaged pupils.
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D6.2 Target market

- Innovation
- A description of proposed key users and target settings is available (e.g. type of settings, specific population of children/young people) which includes a focus on socioeconomically disadvantaged children and young people.
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- Pilot
- There is an initial understanding of the number of settings and pupil population that meet the description of intended users, including an estimation of the proportion that are likely to be socioeconomically disadvantaged.
-

- Efficacy
- The description of intended users and settings is clearly outlined based on prior delivery and formative feedback.
 - Initial analysis has been undertaken to estimate (1) the number of settings that meet the targeting and eligibility criteria, (2) the proportion that can currently be serviced, and (3) a target for reach that represents a meaningful
-

D6.2 Target market

proportion of the market, including a meaningful proportion of settings with more socioeconomically disadvantaged children and young people.

- An initial analysis of the characteristics of the settings that make up the serviceable market in terms of geography, budgets, population of children and young people, and priorities has been conducted. This information will inform programme design (D1.1), scaling strategy (D3.1), compatibility with setting contexts (D5.1) and stakeholder engagement (D5.2).

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- Effectiveness
- The description of intended key users and target settings is informed by prior evaluation and up-to-date market analysis.
 - Market analysis has confirmed that the total serviceable market and target for reach are sufficiently large for meaningful scale, including among settings with a high proportion of socioeconomically disadvantaged children and young people.

-
- Scale up
- The requirements of different groups within the serviceable market are known and can be met, including settings serving a high proportion of socioeconomically disadvantaged children and young people, and there are credible and sustainable plans in place to reach a meaningful proportion of the target market (see also D3.1).
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D6.3 Pricing strategy

- Innovation
- No requirements.

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- Pilot
- Initial analysis indicates that settings would, in principle, consider paying for the programme.

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- Efficacy
- An initial proposed pricing strategy has been developed including consideration of how delivery could be funded outside the context of evaluations (depending on scaling strategy, see D3).

D6.3 Pricing strategy

- The potential financial costs of the programme and their acceptability to settings have been explored.
 - If the programme is not already commercially delivered, preliminary analysis has been undertaken of how much settings would be willing to pay for the programme in theory, or other potential funding sources have been identified. This includes consideration of affordability for settings with high numbers of socioeconomically disadvantaged children and young people.
-

- Effectiveness
- Prior evaluation and delivery provide positive evidence that the potential financial cost to settings is viable, with settings willing to pay (or alternative fundings sources identified), including for those settings serving a higher proportion of socioeconomically disadvantaged children and young people.
 - A potential pricing strategy is in place that is aligned to a viable scaling strategy and available funding sources. This might evolve further through the course of the effectiveness study, particularly if delivery at this stage would involve working in new partnerships.
-

- Scale up
- Prior evaluation and delivery provide robust evidence that the actual financial cost to settings is viable.
 - A sustainable pricing strategy is in place, with evidence of sustained willingness of settings to pay or committed, sustainable funding secured. The pricing strategy may be adjusted based on learning from the scale-up stage.
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Appendix: List of reviewed documents

Scaling frameworks and resources

Bremaud, I., Farheen, S A., Morinière, L., Turnbull, M., Vaughan-Lee, H. & Xaxa, V. (2018). Scalability assessment and planning toolkit. Save the Children Switzerland.

Available: <https://resourcecentre.savethechildren.net/document/scalability-assessment-and-planning-sap-toolkit/>

Cooley, L., Kohl, R. & Ved, R. (2020). Scaling up—from vision to large-scale change: a management framework for practitioners. 3rd edition. Washington, DC: Management Systems International.

Available: https://www.msiworldwide.com/wp-content/uploads/2023/10/ScalingUp_3rd-2021_v3_0.pdf

Milat, A., Lee, K., Conte, K., Grunseit, A., Wolfenden, L., van Nassau, F., ... & Bauman, A. (2020). Intervention Scalability Assessment Tool: A decision support tool for health policy makers and implementers. *Health Research Policy and Systems*, 18(1), 1-18.

Available: <https://health-policy-systems.biomedcentral.com/articles/10.1186/s12961-019-0494-2>

Robinson, J., Wyss, M. & Hannahan, P. (2021). Scaling Strategy Worksheet: Planning for scale. Center for Universal Education at Brookings.

Available: https://www.brookings.edu/wp-content/uploads/2021/07/Scaling_Strategy_Worksheet_Eng.pdf

VVOB (2021). User Guide to the Education Scalability Checklist. Belgium, Brussels: VVOB.

Available: <https://www.vvob.org/en/downloads/education-scalability-checklist-user-guide>

World Health Organization. (2010). Nine steps for developing a scaling-up strategy. WHO.

Available: <https://www.who.int/publications/i/item/9789241500319>

World Health Organization. (2011). Beginning with the end in mind: Planning pilot projects and other programmatic research for successful scaling up. WHO.

Available: <https://www.who.int/publications/i/item/9789241502320>

Wu, J., Wingard, A., Golan, S. & Kothari, M. (2021). From Research to Market: Development of a transition process to integrate sustainable scaling methodologies into education innovation research design and development. SRI International.

Available: <https://www.sri.com/publication/education-learning-pubs/from-research-to-market-development-of-a-transition-process-to-integrate-sustainable-scaling-methodologies-into-education-innovation-research-design-and-development/>

EEF reports

Bogiatzis-Gibbons, D., Broch-Due, I., Breathnach, S., Evans, A., Gadenne, V., Hardy, T., Holt, M., Manby, A., Vinnitchok, A. & Barnard, M. (2021). National School Breakfast Programme: Scale-up evaluation report. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/national-school-breakfast-programme>

Disley, E., Nightingale, M., Amodeo, G., Haider, A., Culora, A., Dimova, S., Gilder, L. & Virdee, M. (2023). The Nuffield Early Language Intervention Scale-up: Evaluation report. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/nuffield-early-language-intervention-scale-up>

Disley, E., Nightingale, M., Haider, A. & Amodeo, G. (2023). The Nuffield Early Language Intervention Scale-up: Evaluation report – Year 2. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/nuffield-early-language-intervention-scale-up>

Maxwell, B., Stiell, B., Stevens, A., Demack, S., Coldwell, M., Wolstenholme, C., Reaney-Wood, S. & Lortie-Forgues, G. (2021). Review: Scale-up of EEF efficacy trials to effectiveness trials. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/evaluation/eef-evaluation-reports-and-research-papers/syntheses-of-eef-evaluations/scale-up-of-eef-efficacy-trials-to-effectiveness-trials>

Smith, A., Staunton, R., Sahasranaman, A. & Worth, J. (2023). Impact evaluation of Nuffield Early Language Intervention (NELI) Wave Two: evaluation report. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/nuffield-early-language-intervention-scale-up-impact-evaluation>

Straw, S. & Boyland, M. (2023). Process evaluation of the Accelerator Fund pipeline delivered in 2021-2022. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/accelerator-fund-evaluation-2021-2022>

Taylor, P., Stretch, E., Hardy, T. & Blas, N. T. (2024). Embedding formative assessment scale-up evaluation: Evaluation report. EEF.

Available: <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/embedding-formative-assessment-re-grant>



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