

EEF Grantee Guide

Last updated October 2026

Congratulations on gaining support from the EEF – we’re really looking forward to working with you during your project.

This document contains some information about being an EEF grantee, how the EEF will manage your grant, and how you can manage some of the common risks encountered in running EEF projects. It is intended as a guide only – please do contact your programme manager about anything more detailed, or with any questions or concerns.

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The purpose of our partnership

The EEF funds projects to deliver two outputs:

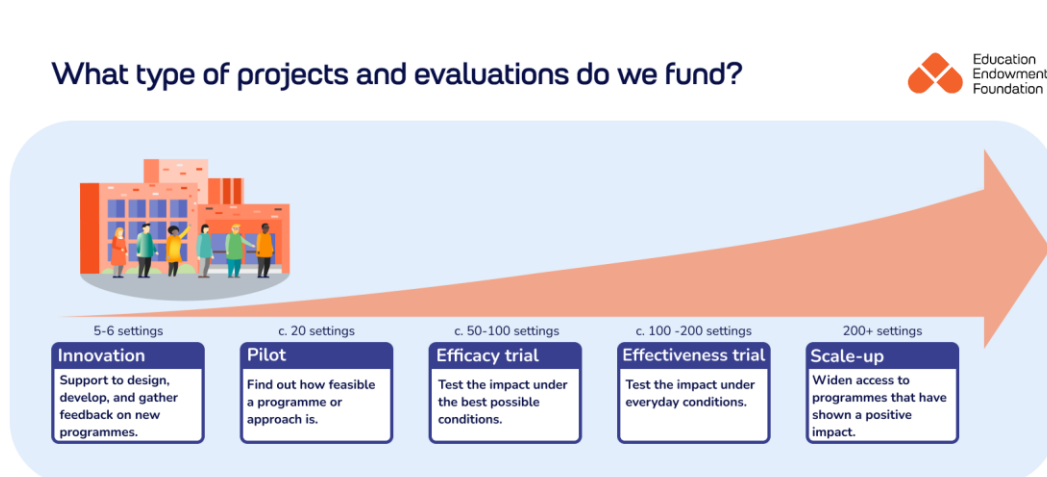
1. An agreed intervention that we hope will benefit pupils, and help to close the attainment gap; and
 2. Robust evidence on how effective the intervention is at benefiting pupils and closing the attainment gap.
- The evaluation results from all projects are described in an evaluation report, written by the independent evaluator. An example of an evaluation report can be viewed [here](#).

Both outputs are equally important to the EEF, and grantees have responsibilities relating to the delivery of both. Establishing a good working relationship with the independent evaluator is usually critical to achieving the second of these outputs.

Stages of EEF evaluation

The EEF funds projects at different stages of development and evaluation. You'll be aware which stage you applied for; occasionally we discuss funding a different stage with applicants.

If we find, once we have received the evaluation results, that your programme has a positive impact, we may progress your programme to a later stage of evaluation and fund further evaluation. More detail on this is included later in this guide, under the 'end of grant process'.



Setting up the grant

A high-level summary of the process and timeline for setting up a new EEF grant can be found [here](#).

Drafting budgets

One of the first tasks after the initial grants committee is to start drafting a budget for the project. Here are some things to consider:

- EEF funding can cover the costs needed to deliver your proposed intervention and manage the project. However, the type of funding varies considerably between projects, and we would usually expect contributions from other organisations: e.g., you and/or your delivery partners. The EEF will pay a substantially lower proportion of the project costs when funding for-profit grantees.

- The EEF usually expects participating schools/settings to contribute some of the costs of the project. Schools and settings in the intervention group in EEF trials are usually required to contribute towards the costs of the programme. School/setting payments can help to reduce attrition from trials and test a payable model closer to the conditions outside the evaluation. Any school/setting contribution will be agreed with EEF and recorded in your budget. The grantee will be responsible for collecting agreed setting contribution payments.
- Our funding can cover the costs to deliver the project from start to finish: this includes the costs to recruit the required number of settings to the project, deliver your programme to the required number of settings (often just the ‘intervention’ settings), and costs to manage the project such as liaison with EEF and the evaluators throughout the project, starting from the set up meetings and finishing with commenting on the final project report. Your Programme Manager will be able to share a rough project timeline with you.
- It is worth noting that recruiting a school or setting to a trial is typically more work than recruiting a school or setting to your standard programme – as settings need to fully be onboarded and understand the trial element, so we advise grantees to think carefully about the resources put into school recruitment. Recruitment is so important because if the required number of settings can’t be recruited, the project may not be able to go ahead. See the EEF’s **recruitment and retention guidance** for more detail.
- Sometimes your programme might be available to purchase outside the EEF trial, and you will already have a ‘delivery cost’ to settings for the programme. EEF pays the direct costs of delivering the project so we wouldn’t simply pay the packaged delivery cost per school, we would want the costs broken down to show all relevant activity. During a pilot study or efficacy trial, EEF funding can only pay for the direct activity taking place and not cover any profit that might be baked into commercial rates.
- For projects that the EEF is scaling up (i.e., testing at effectiveness level or funding scaled delivery post-effectiveness) we might calculate budgets differently and could expect to subsidise the standard school/setting programme rate if the programme is commercially available. If your project is a scale up project, your Programme Manager will discuss this with you.
- The EEF doesn’t typically expect to pay for any costs related to the development of your programme – at efficacy level especially we expect the programme to be fully developed. If your project is a pilot, your budget might include a limited amount of development costs to ensure that the delivery model is robust enough to be ready to be tested at sufficient scale – this will be discussed with your Programme Manager. There are IP implications that grantees should be aware of if your programme is developed with EEF funding, which we will discuss with you.
- The EEF only pays for staff time on the EEF project: we ask you to calculate the number of days each staff member is required to work on the project activities (this must be direct EEF project activities only) for the budget.
- The EEF will consider funding overheads on staff costs for non-university delivery teams at the pilot, trial, and scale-up stages of the EEF programme evaluation pipeline. Overheads are costs that are essential to but indirectly associated with delivering a programme, such as costs related to estates, administration, and management. Further detail on overhead costs that can be included in budgets is available in the budget template, which your Programme Manager will share with you. The EEF does not fund university overheads. Universities can apply for funding for all ‘directly incurred’ costs (e.g., salary costs of research assistants) and, subject to certain conditions, ‘directly allocated’ costs (e.g., the costs of support staff where these are specifically needed for the project). However, the EEF does not fund indirect university costs (e.g., estate costs of permanent university staff).
- The EEF does not generally expect to fund the purchase of ‘assets’ - (e.g. mobile phones, flash drive, hard drive, cameras, laptops, tablets, etc). If these are specifically required for the EEF project, please discuss with your Programme Manager.
- The EEF does not routinely provide funding to the grantee to collect data (qualitative or quantitative), and conduct analyses themselves. We are separately funding an independent evaluation team to conduct both an impact evaluation and an implementation and process evaluation, using a range of quantitative

and qualitative methods. Grantees can conduct and, where prior written approval has been provided by EEF, publish their own analyses of data collected during the research. This work must not interfere with the running of the EEF-funded project and is subject to the provisions of the EEF **Reports and Publications Policy** and the grant agreement between the grantee and the EEF. However, grantees normally will be expected to find additional funding to carry out this work.

- Our grants can be treated as research, as we evaluate the projects we fund independently with a view to publish a research report made publicly available, and our grantees collaborate with the research team (the evaluator) on the project. Our grant would therefore usually be treated as outside the scope for VAT. However, the grantee is responsible for making the VAT assessment and the EEF cannot advise you on this.
- All EEF grants must comply with Cabinet Office consultancy spend control guidance¹ in relation to spend on advertising, marketing, communications and consultancy, other than marketing activities in respect of direct project school recruitment activities including social media, webinars, newsletters and school meetings. We wouldn't expect spend in this area beyond that directly required to recruit schools/settings to the project.
- Settings in the control group are often provided with an incentive payment for taking part in the evaluation, and this will be included in the grantee's budget, and the grantee will have responsibility for making those payments to schools, after confirmation from the evaluator that all evaluation commitments have been adhered to. Your Programme Manager will be able to discuss likely amounts for this with you, and this will be finalised in set up meetings.

We will provide you with a standardised template to complete the budget for your project.

The EEF will request an initial budget before the first Grant Committee approval of the project and will need to fully agree to your final project budget before we take the final project proposal to the EEF Grants Committee. The EEF will only take proposals to the Grants Committee that we are confident represent value for money, therefore if we cannot agree a reasonable project budget, projects may be stopped at this stage. The Grants Committee also assess value for money of the overall proposal (including the evaluation budget), with consideration of the budget in relation to the stage of evaluation and may reject a proposal they do not view as value for money.

Once a project budget is agreed, EEF expects the grantee to have suitable controls in place to ensure the funds are restricted for the EEF project and spend monitored. Any deviation from the original agreed budget/request to transfer across budget lines must be discussed and agreed by EEF. At the end of the project (or in the interim for longer projects) we will expect a statement of spend which shows all spend across each budget line, and any underspent funds will be returned to EEF.

Due diligence

EEF will conduct detailed due diligence on your organisation prior to a final recommendation being made to the EEF Grants Committee. This includes due diligence in relation to organisation capacity and expertise for project delivery, detailed financial due diligence on your organisation, and checks related to safeguarding and data protection during the project. We will also check that the grant would not be in breach of subsidy control legislation. We will request information from you as part of these checks.

Initially your Programme Manager will make an assessment on each of these areas. For any programmes identified as medium or high risk in relation to safeguarding, the EEF's Safeguarding Team will review and make further

¹ Please consult the Cabinet Office consultancy spend control guidance, which is available here:

<https://www.gov.uk/guidance/consultancy-spend-controls> (and the link to advertising, marketing and communications controls).

recommendations with regards to mitigation and additional reporting requirements to monitor safeguarding (see EEF Portal section). Your Programme Manager will discuss this with you prior to final approval for the project.

Setting up the Grant Agreement

The Grant Agreement specifies the conditions of the grant and the relationship between the EEF and the Grantee. Our grant agreement template and terms are a reflection of our governing grant with DfE, therefore there is little scope for negotiation of terms. We will share this template with you so you can fully review the terms. The grant agreement also contains the payment schedule and milestones. The milestones and payment schedule need to be carefully designed to ensure that funding is scheduled against activity. Payments are made in arrears, and EEF will not usually make a payment until all agreed milestones relating to the payment have been achieved. The payment schedule should reflect the fact that the EEF does not pay more than 10% of the grant before recruitment of schools is complete and the schools involved have submitted all the data required prior to randomisation. The payment schedule should be written to reflect this. An example of a payment schedule is included in Appendix 1 of this guide.

Designing the evaluation

After an independent evaluator has been assigned to the project, the evaluator will work to design the evaluation. Planning for the evaluation will mainly happen during two “evaluation set-up” meetings attended by the grantee, the evaluator and the EEF. In addition to the evaluation set-up meetings, the grantee and evaluator will participate in an “IDEA workshop” (Intervention Delivery and Evaluation Analysis workshop), which aims to explore and confirm the details of the Theory of Change or “logic model” for the project (how the project works, what it involves, what its intended outcomes are, etc).

Be ready to talk through the core content of the project and key aspects of delivery at the set-up meetings and IDEA workshop. It will be helpful to have considered in advance how you think the key parts of the project might contribute to improved attainment outcomes. You will be asked to describe the following aspects of the project at these meetings to help the evaluators to thoroughly understand the project and design the logic model:

1. Project name
2. Why: Rationale, theory and/or goal of essential elements of the intervention
3. Who: Recipients of the intervention
4. What: Physical or informational materials used in the intervention
5. What: Procedures, activities and/or processes used in the intervention
6. Who: Intervention providers/implementers
7. How: Mode of delivery
8. Where: Location of the intervention
9. When and how much: Duration and dosage of the intervention
10. Tailoring: Adaptation of the intervention
11. How well (planned): Strategies to maximise effective implementation
12. How well (actual): Evidence of implementation variability

Hoffman et al. 2014 – the TIDieR Framework

Ultimately the evaluation is the responsibility of the evaluator, but it is important that the grantee has a good understanding of how the evaluation will work. During the evaluation design phase, we advise that grantees for efficacy or effectiveness trials familiarise themselves with the following key evaluation concepts and consider the following points in preparation for the set-up meetings. If you are a grantee for a different type of evaluation, such as a pilot study or scale up evaluation, some of these evaluation concepts may not be part of the evaluation design for your project. Your programme manager can advise you on which evaluation concepts it would be most useful for you to familiarise yourself with.

	Key points to understand	Points to consider for the set-up meetings
Primary outcome measure	The primary outcome is the main measure that will be used to assess the impact of the programme. It will be used to determine the 'months progress' figure displayed on the project page on the EEF website. The primary outcome in EEF-funded evaluations is usually a measure of academic attainment.	The primary outcome measure for the evaluation will be decided at the set-up meeting. Make sure the chosen primary outcome measure makes sense to you in relation to the logic model for the intervention.
Secondary outcomes	Secondary outcome measures are used to assess additional effects of the intervention not captured by the primary outcome measure. Secondary outcomes sometimes include measures other than academic attainment.	The secondary outcome measure for the evaluation will be decided at the set-up meeting. Make sure the secondary outcome measures chosen for the evaluation makes sense to you in relation to the logic model for the intervention.
Baseline measures	Baseline measures are tests carried out before the intervention is introduced. A common misconception is that baselines will be used to measure pupil progress, enabling evaluators to compare pupil attainment before and after the intervention. The baseline measures will not be used for this purpose, but to identify variation between the intervention group and the control group. Understanding how different the intervention and control group were at the start of the study helps evaluators to determine how sure we can be that differences in the final outcomes are due to the intervention, not due to pre-existing differences between these groups.	Check that you understand how the baseline data will be used to inform the evaluation.
Implementation and Process Evaluation (IPE)	EEF trials usually have two main parts, the Impact Evaluation and the Implementation and Process Evaluation (IPE). While the Impact Evaluation focuses on analysing the primary and secondary outcomes, the IPE will focus on analysing how the intervention is implemented. The IPE often includes observations of the intervention, and stakeholder surveys or interviews.	Consider whether the research questions and activities planned as part of the IPE are likely to enable the evaluators to gain a good understanding of the delivery of the intervention. If there are any key aspects of the intervention implementation that you think it will be important for the IPE plans to capture, let the evaluators know.
Attrition	Attrition refers to schools or pupils dropping out of the evaluation before they have taken part in the primary outcome data collection. There is usually some attrition from trials, but it is important to try to keep it to a minimum, because attrition impacts how confident we can be in the trial results. Attrition reduces our confidence in the trial outcomes because it results in missing data, reduces the sample	Consider what actions you will take at different stages of the trial to try to minimise attrition from the project.

	size and statistical power of the trial, and can introduce differences between the intervention group and the control group.	
Intention to treat	Intention to Treat is the principle that every pupil/school included in the trial at the point of randomisation should be included in the final analysis, even if they drop out of the evaluation before the end of the trial or don't implement the intervention. Intention to treat analysis is widely considered as best practice for experimental trials and is used across EEF studies. Intention to treat is important because it reduces bias in the trial results and ensures the results give an accurate indication of how effective the intervention is in a real-world setting. If lots of schools found an intervention difficult to implement and consequently dropped out of an evaluation, only focusing on the schools who continued with the project in the final analysis would give an inaccurate impression of how well the intervention had worked.	Make sure you understand the principal of intention to treat and have asked the programme manager or evaluator for further explanation if needed.
Compliance	Compliance is the minimum amount of an intervention that a school, teacher, class or pupil will be expected to complete to be considered as having properly partaken in the intervention. During the evaluation design period, the evaluator will consult the grantee on what the definition of compliance should be for your specific programme (for example, in the EEF project First Thing Music, it was agreed that schools would be considered as compliant if they attended at least 4 of the 6 training sessions on offer and delivered the intervention to their class for at least 1 hour per week on average). As part of the evaluation, the evaluators will look at the proportion of schools that were compliant with the intervention and will conduct a 'compliance analysis' to find out whether the outcomes for compliant schools differed from those of non-compliant schools. Compliance is usually a binary measure.	Ahead of the set-up meeting, consider the degree to which you think schools need to engage with the intervention to sufficiently benefit from it. It will be important for the definition of compliance agreed on at the set-up meeting to accurately reflect this. If the compliance definition is too lenient or too strict, it will not provide as useful an indication of whether schools who properly participated in the trial had better outcomes than other schools, so it is important to give careful thought to what the definition of compliance should be.
Fidelity	Fidelity is the extent to which an intervention is implemented as intended. An example of low fidelity could be teachers not sticking to the key principles of the intervention training when	Consider what the key components are for effective delivery of the intervention. The Implementation and Process Evaluation plans will aim to provide the evaluators with the

	delivering the intervention to their class. Compliance and fidelity are related concepts, but fidelity usually isn't assessed as a binary measure. One of the aims of the Implementation and Process evaluation is to gather information about whether the programme is being implemented with high fidelity.	information they need to know about whether the intervention has been implemented as intended.
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Commenting on the protocol

The evaluator will produce an evaluation protocol or study plan, which specifies how the evaluation will proceed. Grantees will be given an opportunity to comment on the protocol before it is finalised and published on the EEF website. It is important to read the protocol and understand the key components of the evaluation at this stage, as it is usually not possible to make changes to the evaluation design once the protocol has been published. When reviewing the protocol, the grantee should check:

- That the description of the intervention and the background to the study in the protocol is accurate. If there are any inaccuracies in the evaluator's understanding of the intervention details, it is important that these are brought to their attention and corrected in the protocol.
- That key aspects of the evaluation design are as agreed in the set-up meetings (including the primary outcome, secondary outcome and baseline measures; the definition of compliance; and the planned Implementation and Process evaluation activities).
- That the timeline for the trial is correct and lines up with your project delivery plans.

The protocol is a technical document aimed primarily at a researcher audience, so do not hesitate to ask questions about the terminology or design of the evaluation. We do not expect grantees to have a background in evaluation methods. An example of an evaluation protocol can be viewed [here](#).

EEF Portal

As a new grantee you will be set up on the EEF Portal. This is our online system to support grant management. Through the portal, you will be able to upload data that is required for project monitoring, for example school recruitment and retention data (required fortnightly through the recruitment phase of your project), and evaluation and testing data (which will be uploaded by your independent evaluator). You will also be able to upload invoices and submit safeguarding logs if applicable to your project. Our dedicated data team will set you up on the Portal once your Grant Agreement has been finalised and is on-hand throughout your grant period to support with any technical or system queries.

[Logging safeguarding incidents through EEF Portal](#)

Delivery team grantees and evaluators are required by the grant/evaluation agreement to report safeguarding incidents to the EEF as soon as they occur by emailing the Programme Manager and copying safeguarding@eefoundation.org.uk, to give an anonymised description of the incident.

Projects where the delivery activities or the evaluation activities are considered to have a high safeguarding risk are normally asked to complete a quarterly safeguarding log. If they have no incidents to report, you have the option on the portal to say so.

For teams who have been asked to complete a quarterly safeguarding log, you will be required to name a safeguarding contact. This contact will then use the CRM portal to submit the safeguarding log on a quarterly basis.

Once a safeguarding log has been submitted, your Programme Manager will review this on our CRM system which is linked to the Portal and escalate it to the safeguarding team as required. Your Programme Manager will communicate with you if further information or action is required for live safeguarding incidents and inform you about next steps that the EEF has taken in line with our safeguarding policy and procedures.

Grantees must still inform their EEF Programme Manager as soon as a safeguarding incident related to their project occurs, in accordance with the grant agreement. The quarterly safeguarding log is there to encourage regular record-keeping of safeguarding incidents and as a safeguard to ensure all incidents have been reported to the EEF.

School recruitment (and retention)

The size of the project is carefully designed to produce robust estimates of impact. Therefore, recruiting and retaining the agreed number of schools is critical for the success of the project. EEF has produced a **Recruitment and Retention Guide** outlining some of the key issues to consider in this area. If less than the agreed number of schools or pupils is recruited, then this will usually lead to a pro-rata reduction in the grant and an amendment to the payment schedule. If a project is under-recruiting to such a large extent that it will not yield any robust evaluation findings, then it is likely that the grant would be terminated.

It is important to keep your Programme Manager updated as you recruit schools. You will be provided with a template for tracking school recruitment, and this must be submitted via the EEF Grantee Portal on a fortnightly basis. At the end of the recruitment period, all schools that have signed up to take part will receive a 'certificate of thanks' from the EEF recruitment team to recognise their contribution and commitment to the trial.

Schools involved in your project

Communicating school participation in evaluations

It is important to keep the EEF updated about which schools are involved in your project. Please email EEF a spreadsheet list of schools taking part in the project once all schools have been recruited (or for some projects, we will request this on a fortnightly basis). This list should include school names, URNs and addresses for both intervention and control group schools. Staff names, contact details and whether schools have been assigned to the intervention or control group should not be included, unless stated in the project's privacy notice and agreed in the terms of your grant. You will be asked to provide interim lists of recruited schools regularly during the recruitment period.

Grantees should not publish or share lists of participating settings involved in an EEF evaluation (other than with the EEF and the evaluator), as maintaining anonymity is essential to the integrity of evaluation reporting. Sharing a full list could increase the likelihood that individual settings are identified and may influence participant behaviour if they feel their contributions could be traced back to them.

While settings themselves are not restricted from communicating their participation, grantees should encourage settings to use more generalised messaging e.g., referring either to their connection with the programme (not trial) or to participation in an 'EEF project', rather than identifying themselves as participating in a specific trial. Although grantees cannot control what individual settings choose to communicate, they should provide clear, proportionate guidance that balances transparency and celebration of participation, with the need to uphold the integrity of the evaluation.

How will the EEF use the information on recruited schools?

The EEF may use the schools' information to:

- **Monitor the geography of the projects we are funding.** We want to ensure that our projects reach all regions of the country and are representative of a range of schools and areas. Therefore, we need to understand which schools our grantees are reaching.
- **Check the overlap between projects.** Schools recruited to an individual project will be flagged in the system so that when another project lists them, we will be aware that the school is already involved in an EEF project. Often this is not an issue (for example, if the projects focus on different age groups or subjects) but we need to monitor it as it could affect the evaluations. We will notify you if we notice any schools in your project that are listed on another project during the recruitment period.
- **In some cases, contact the schools,** for example if the project is part of funding initiative that will require some extra evaluation/data collection. We will ensure this is clearly communicated to schools in the recruitment materials.

While EEF do not have any plans to publish the names of the schools involved in our projects, we may – at times – share more general information with other interested parties (for example, if a local authority wishes to know whether schools in their areas are actively involved in EEF projects). This should be covered in your project's privacy notice (which you will work on with your evaluator). Please let us know if you believe that the schools will have any objection to this.

Data protection roles

Data protection roles will be discussed during set up meetings, and the EEF will conduct additional due diligence in relation to this, especially for projects deemed higher risk where sensitive data is being collected. Typically, the EEF, grantee and evaluator are all independent controllers (in some cases, joint controllers) of the data they collect for the project. Your grant agreement will contain agreed data that will be collected by your party. All roles will be carefully communicated to schools in school recruitment documentation, which include a privacy notice for the project.

Invoices and payments

Payments to grantees are scheduled over the life of the project as delivery milestones are completed. We can only make payments in line with the payment schedule included in the Grant Agreement, and if we are comfortable that sufficient progress is being made.

If a payment is due and the milestones have been met, we ask that you please issue us with an invoice. The invoice should come from the lead organisation (the counterparty from the Grant Agreement) and be uploaded via the EEF Portal. Your programme manager will be automatically notified that your invoice is on the system for approval. The following information is required on each invoice:

1. The name of the project
2. If you are the grantee or evaluator delivering the project
3. Name of the lead contact at The Education Endowment Foundation (the person in charge of the Project)
4. The milestone phase and date as per the grant agreement, for example the first milestone phase and date would count as M1, 10th July 2025.
5. The milestone description as per the grant agreement and the amount agreed for the requested milestone phase
6. For the final invoice of the project, a final statement of spend should be attached with the final invoice.

A progress report should be attached to the invoice submission via the portal, which outlines your progress against the milestones that were to be achieved, and you may wish to discuss this in advance with your programme manager. Please also include appropriate supporting documentation (as specified in the milestones or with your programme manager). If the programme manager is happy with the progress, they will recommend the invoice is approved and this will be sent to our Director of Finance for final approval. If your invoice is over £50,000 there is an additional layer of sign off required by an EEF Trustee on behalf of EEF. Once this is complete, our finance team will make a bank transfer. In order to make the transfer, we will need your organisation's bank details. Please ensure that these are at least on the first invoice we receive from you, on headed paper. You will be able to track the progress of your invoices on the EEF Portal, but in the first instance, always check with your programme manager for updates.

If there has been a delay in achieving the milestones, we will not be able to make the payment. We would expect you to be in discussion with your programme manager about any such delay and for this to be captured in your progress report. In most cases, we will just ask that you do not submit an invoice until the milestones have been met.

If there is a more significant issue which means that the milestones are unlikely to be met, this should be discussed with your programme manager as soon as possible. We would prefer to be made aware of any problems sooner rather than later, as this makes it more likely that we can find a resolution. If milestones are not met, the EEF has the right to withhold, reduce or cancel milestone payments, as outlined in the grant agreement.

Testing

Testing pupil outcomes can be a challenging part of running a project and in conjunction with the evaluator needs careful planning. It is important that the timeline for collecting data and the responsibilities of grantee and evaluator is made clear from the start. Tests will be ordered and delivered by the evaluator, but the time needed to do this needs to be factored into grantees' project plans. This can take up to two months, but the test providers are becoming better at reducing this time. If there are problems in this area, your evaluator should contact the EEF evaluation team who may be able to work with test providers to overcome specific issues.

It is also important to appreciate that results are needed from all schools. Sometimes it can be more challenging to get results from control schools, but in terms of delivery of robust evidence on effectiveness, results from control schools are just as important as results from intervention schools. It is important to ask schools to still take part in testing (or consent for their data still to be used in the case of projects using the National Pupil Database) even if they drop out of the project.

The **Recruitment and Retention Guide** also includes additional information on testing.

End of grant process

Evaluation reports

An evaluation report will be written on every EEF-funded project. They are intended to provide robust, transparent information on the findings on the evaluation. The executive summary of EEF evaluation reports will be written in plain, non-technical English that provides an accessible summary of the findings.

The independent evaluator will submit their report to the EEF, following an evaluation template provided by the EEF. After the report has undergone an internal review by EEF and an external peer review by two academics, the grantee will be given an opportunity to provide comments on a draft of the report and where appropriate your comments will be incorporated into the final version.

You will be sent the final report prior to its publication.

Timeline

The time taken for the end of grant process will vary between projects. The sequence of events typically looks like:

1. Project completion.
2. Evaluator submits initial draft report to the EEF (usually at least 3 months after last data collection).
3. Report is reviewed by the EEF and external experts and edited by evaluator following their input.
4. Report is shared with grantee.
5. The EEF and grantee meet to discuss report.
6. The EEF passes grantee's comments to evaluator, who then makes further edits.
7. The EEF drafts the report's executive summary and text for the EEF's website, working with the evaluator to ensure the findings are made accessible to teachers.
8. The EEF publishes the evaluation report (usually 12 months after end of project).

End of grant report

At the end of the project, we require submission of a full set of accounts detailing final project expenditure against each budget line. This should be provided in the Final Statement of Spend template, which will be sent to you by your Programme Manager. EEF agrees project budgets at the maximum likely expenditure, so it is normal for there to be underspend against the agreed budget. This underspend must be returned to the EEF.

What happens next?

The EEF have set re-granting criteria, for when the programmes we trial show positive evaluation results. We consider the impact on attainment, cost effectiveness, how well implemented the programme was, and security of the findings upon making decisions, as well as the grantee's appetite and ability to progress the project further. We will discuss with you if your project meets these criteria, and what the next steps might be (e.g. we might wish to progress to an effectiveness trial to test your programme at a larger scale in more real-world conditions, or after a positive effectiveness trial result, we may support your programme to scale up).

Any re-granting decisions will be made by the EEF Grants Committee. Positive evaluations will not automatically lead to a further EEF evaluation or scale-up award.

Financial audit

You may be asked to take part in a financial audit by the EEF at any time. Furthermore, at the end of the grant, we expect you to submit a financial account of monies spent, including any unspent funds that will then be returned to the EEF.

Our financial audits currently include:

- Review of management accounts and balance sheet
- Review of budgets
- Interview with the relevant organisation manager
- Review of financial controls such as bank reconciliations, number of signatories, payroll controls, etc.
- Review of controls on EEF restricted funds and grant milestones achieved.

Partnership working and external funding

The Education Endowment Foundation were set-up in 2011 by the Sutton Trust in partnership with Impetus, with a founding grant of £125m from the Department for Education. We were re-endowed in 2022 with a further £137m, which will allow us to continue our work until at least 2032. For information about the EEF's independence, please see [How we work independently](#).

The DfE has asked that we record all sources of funding for those projects that the EEF is supporting to ensure their full value is captured. This includes any funding contributed to that project by you as a grantee and/or your funders. The EEF may occasionally ask grantees to complete a simple form setting out any financial support (in cash or in-kind) which you or others are contributing to the EEF-funded project.

The EEF for its part actively builds relationships with other funders with the aim of attracting financial interest for projects approved by the EEF's Trustees. This support might be channelled directly to the EEF to distribute, or it might need a separate application from the EEF grantee. These funds might be to expand the scope of the project (in discussion with the applicant and the evaluator), or to support the EEF's existing funding of it. If another funder is supporting your grant, there may be additional reporting requirements, which we will outline to you.

Depending on the results of the project evaluation and the decisions of our Trustees, we may also support those organisations looking to scale up their work in seeking financial support, for example by promoting the project to funders connected to EEF.

As a publicly funded charity, the EEF communicates its work through a variety of media. We may, therefore, request that grantees provide us with images that can be used in our communications materials and/or quotes that enable us to communicate the work that the EEF is funding. In addition, we may sometimes hold events for current and potential EEF supporters at which we may request your support.

EEF brand guidelines

The EEF's name:

Please always refer to 'the Education Endowment Foundation' and only use the abbreviation 'the EEF' if the full name has already been used once.

The EEF's description:

If you wish to refer to the EEF more fully, please use the following wording:

"The Education Endowment Foundation is an independent charity dedicated to breaking the link between family income and educational achievement. It does this by supporting schools, colleges, and early years settings to improve teaching and learning through better use of evidence".

The EEF's role:

If you wish to refer to the EEF's role, please use the following wording:

"The Education Endowment Foundation is an independent charity dedicated to breaking the link between family income and education achievement.

It does this by supporting schools, colleges, and early years settings to improve teaching and learning for two – 19-year-olds through better use of evidence.

The EEF logo:

Where appropriate, please use the EEF's logo. We will supply a hi-res electronic version.

The EEF online:

When referring to the EEF on your website, please link to the following address:

www.educationendowmentfoundation.org.uk

The EEF is also active on:

Twitter: **@EducEndowFoundn**

Facebook: **www.facebook.com/EducEndowFoundn**

LinkedIn: **<https://www.linkedin.com/company/the-education-endowment-foundation>**

YouTube: **<https://www.youtube.com/channel/UC5-jDNhzw1ySqP42gCv23lQ>**

Bluesky: **@theeef.bsky.social**

Questions

As set out in the EEF's **Reporting and Publications Policy**, grantees must discuss the timing, placement and details of external publications referencing the evaluation with the EEF at least 30 days prior to publication. Please see the policy for full details of these requirements and contact your Programme Manager if you have any questions.

Further brand guidelines:

For more detailed branding guidelines, please refer to our website:

<https://educationendowmentfoundation.org.uk/about-us/eef-brand-guidelines>.

Additional support to the EEF

The EEF may also from time-to-time request additional involvement in our work. For example, we may ask that you meet up with another grantee if we feel that they could learn from you or may ask you to present at a conference. While this is not a formal commitment, we see it as a fundamental part of our wider role in building the capacity of the English education system to support research, and to share knowledge about evidence-based approaches.

In return, we are happy for you to invite us to participate in your events. Given our small team, we may not always be able to do this. Sometimes we may decide that it is inappropriate for us to do so, as we wish to remain independent of the projects being evaluated. But we are very open to being asked.

Useful evaluation resources

Our website has a **collection of resources** you use to learn more about our approach to educational evaluation, including an **evaluation glossary** and **evaluation FAQs**.

Your feedback

If there is further information that you would find helpful, or you have suggestions about how this guide could be improved, please feed this back to your Programme Manager.

Appendix 1: Example payment schedule

The Project Proposal and Key Performance Milestones

Here, please write an outline of the project: usually 1–3 paragraphs, which include key data such as number of schools and pupils, and brief outline of the trial (e.g. level of randomisation, how many treatment and control groups, what if anything the controls get).

(A draft payment schedule is provided below. Essential milestones, which should appear in the schedule for every project, are bold. Italicised milestones are examples, these are not needed on all projects and can be amended more freely. Rows can be added or removed for longer/ shorter projects).

Key milestones to be completed	Supporting documentation alongside milestone report	Date for completion	Payment
Evaluation protocol agreed with the evaluator and EEF <i>Job descriptions confirmed</i> Recruitment materials developed	Submit all documents to EEF for approval	1 May 20XX	£XXXX (N.B. Maximum 10% of total grant can be allocated prior to randomisation)
<i>Project delivery structure and process agreed</i> At least X schools recruited. Recruited schools have provided both MOUs, pupil data (including UPNs), and all other data required by the evaluation. Details of schools passed to evaluator and uploaded to the EEF database. <i>Staff recruited and inducted</i> <i>Roles and responsibilities of partners confirmed</i>	- Recruitment updates sheet - Roles and responsibilities chart	19 August 20XX	£XXXXX
<i>Delivery plans agreed</i> <i>Schools informed of allocation.</i> <i>Training events scheduled</i>	- Delivery plans - Training schedule	1 December 20XX	£XXXXX
Delivery of intervention programme begins in at least X intervention schools Continuing to support work of independent evaluator Updated EEF on intervention delivery and any attrition.		21 April 20XX	£XXXXX

• Delivery of intervention programmes completed in at least X intervention schools • <i>Follow-up training delivered</i> • Work with evaluators to agree plan for coordinating post-test assessments and ensure schools are prepared for tests. • Short video content developed (1-3 minutes) of the project in action. • Updated EEF on intervention delivery and any attrition.	• Follow-up training attendance • Testing plan • Video	18 August 20XX	£XXXXX
• Support evaluators to engage schools in post-testing		7 September 20XX	£XXXXXX
• <i>Delivery of intervention to control schools underway</i> • <i>Payment to control schools on completion of post-test and all data requirements</i> • Comment on draft of final report • Provide final statement of expenditure	• Report comments • Final statement of expenditure	15 December 20XX (Ensure that this date reflects the likely length of time between post-testing and report editing)	£XXXXXX
		Total	£XXXXXX