

EEF is committed to generating useful research evidence from its funding, and making such findings accessible to schools and others trying to improve educational outcomes of disadvantaged pupils.

Recipients of EEF grants (“**Grantees**”) and persons who enter into an agreement with EEF to carry out an evaluation of a grant project and to produce a report or presentation on the Project (“**Evaluators**” and an “**Evaluation Report**” or the “**Presentation**” (as applicable)) are expected to agree to the principles outlined in this document, which are referenced in the Grant Agreement and Project Evaluation Agreement. Any infringement of this policy will amount to a breach of the Project Evaluation Agreement and could result in early termination of the Project Evaluation Agreement, and jeopardise future funding opportunities.

If Evaluators have any questions, or would like more detailed guidance, Evaluators should contact their grants or evaluation manager.

Key reporting principles

- 1. The first report published about the impact of the Project and findings of the evaluation will be the Evaluation Report**

This will be made freely available on EEF’s website. EEF commits to publishing Evaluation Reports in relation to every grant made. Following this date, EEF anticipates that Grantees will share the report with schools and partners they work with and would encourage them to use the findings to support their work in the future. [Evaluators can find more guidance about writing Evaluation Reports here (see footnote)¹.

- 2. The Evaluation Report is authored by an independent Evaluator**

Grantees will have an opportunity to review a draft of the report before it is published, and will be named and thanked in the report, but they will not be joint authors.

- 3. EEF recommends that Grantees and Evaluators draw up an agreement about authorship of future publications**

For example, it may be that the Evaluator takes lead authorship on publications about the statistical results of the evaluation, and the Grantee on articles about the intervention itself. EEF encourages joint authorship where relevant. EEF is not responsible for these arrangements.

- 4. The Grantee and Evaluator may not make public claims about the impact of the Project before the Evaluation Report is published.**

EEF’s strong preference is that no articles are published, or external presentations are given relating to the Project until one month after the Evaluation Report is published. If Grantees or any partners/media wish to make any materials or reports about the Project public before the Evaluation Report has been published, this may only be done with EEF’s prior consent. EEF reserves the right to refuse any publication or presentation (including, if EEF considers that it makes claims about the Project which could jeopardise the primacy and authority of

¹ <https://educationendowmentfoundation.org.uk/projects-and-evaluation/evaluation/evaluation-guidance-and-resources/reporting-templates>

the Evaluation Report). EEF will aim to respond to any queries within a fortnight.

5. Any article relating to the Project must be submitted to EEF prior to publication

After the Evaluation Report has been published, Grantees and Evaluators are free to publish further articles and reports about the Project. Grantees and Evaluators shall share any proposed articles or reports with EEF before their publication. This is particularly important in the time around the publication of the Evaluation Report – any press releases relating to the publication of the Evaluation Report must be approved by EEF. In all cases EEF requests that:

- Evaluators discuss the timing, placement and details of external publications referencing the evaluation with EEF at least thirty (30) days prior to the proposed publication and share a final draft at least five working days prior to submission (exceptions can be made for opportunities that have a shorter deadline);
- The Evaluator is credited as the lead author of the Evaluation Report;
- Evaluators inform EEF of any media communication they have in relation to the evaluation;
- Evaluators use the correct EEF branding and terminology in all media communication (as provided by EEF from time to time);
- Evaluators do not use quotes in a misleading way that contradicts the overall conclusions of the Evaluation Report; and
- Evaluators provide a reference and link to the report on EEF's website in any material they publish that relates to the Project.

In cases where EEF considers that the evaluation has been used by either grantee or Evaluator in a misleading way, EEF reserves the right to clarify the original conclusions of the evaluation, but would hope to avoid this eventuality by communication prior to publication. Misuse of the Evaluation Report by Grantees may jeopardise subsequent EEF funding decisions on scale-up.

6. Any material published in relation to the Project must reference EEF evaluation, acknowledge EEF's funding and contain a notice that it is available under the Open Government Licence

Grantees and Evaluators must ensure that any material published by them (or parties related to them, including employees, students, agents or appointees) in relation to the Project: (i) refers readers to the Evaluation Report; (ii) accurately acknowledges the support provided by EEF and any other parties specifically requested by EEF (which may include the DfE) in funding the Project; (iii) contains the notice set out and explained further in paragraph 7 below; and (iv) if, and only if, requested by EEF, features DfE's logo. In addition, such materials must not include EEF's logo or branding other than as permitted under the Grant Agreement or Project Evaluation Agreement. Grantees and Evaluators must seek permission from EEF before any use of DfE's logo or name.

If using materials or data from the evaluation, the evaluation must be cited as a source of the information and a statement must be made that the Evaluation Report is available under the Open Government Licence. Where possible, a link to the Evaluation Report and to the Open Government Licence should also be provided where possible (<http://www.nationalarchives.gov.uk/doc/open-government-licence/version/3>).

7. EEF is committed to open access of relevant research arising from its funding

It is a requirement of EEF's funding by DfE that all publications arising from EEF grants are

owned by the Crown under Crown copyright and re-use is governed by the Government Licencing Framework. All publications arising from EEF grants, including Evaluation Reports, must therefore include the following notice:

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Where we have identified any third-party copyright information, you will need to obtain permission from the copyright holders concerned.

If materials that are published relate to the Project but have not been developed in whole or in part using EEF funding, then such materials will not be owned by Crown copyright and re-use will not be governed by the Government Licencing Framework.

EEF may at its discretion provide small amounts of additional funding to ensure materials are freely available (e.g. paying open access fees to journals) so that schools and other education researchers can easily access them.

- 8. Once data relating to the Project is published in EEF data archive, EEF Evaluators will be able to apply to conduct further research on this data.** Authors are required to refer to the original EEF evaluation and evaluations as the source of the data and as the initial analysis of the results.