

EEF policy on grantee-evaluator relationship: A guide for grantees



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This document provides further information for recipients of EEF grants (“**Grantees**”), on the EEF’s expectations regarding their relationship with the independent evaluator assigned to evaluate their project. These clauses arise from the EEF’s original funding agreement with the Department for Education (DfE) and the EEF’s commitment to independent evaluation, and there is little flexibility to edit these clauses. Grantees are expected to agree to the principles outlined in this document, which are referenced in the EEF’s Grant Agreement. Any infringement of this policy will amount to a breach of the agreement, could result in early termination of the agreement, and could jeopardise future funding opportunities.

If you have any questions, or would like more detailed guidance, please contact your programme.

Key points about the grantee-evaluator relationship

1. **All of the programmes funded by the EEF are subject to an independent evaluation, conducted by an evaluator appointed from the EEF’s Panel of Evaluators.** The evaluator produces an evaluation report, which is published on the EEF’s website.
2. **The design and delivery of the evaluation is led by the independent evaluator.** The evaluator will produce an evaluation protocol, which is published on the EEF’s website and states how the research will be carried out. The evaluator is ultimately responsible for the evaluation, but the grantee plays an important role in the development and design of the evaluation. No changes to the research design should be made without the agreement of the EEF.
3. **Where necessary, the EEF will contribute to the co-operation between the Grantee and the Evaluator.** In particular, the EEF will contribute advice on the accepted standards of best practice for educational research to any discussions between the Grantee and the Evaluator regarding modifications to the research design. It is vital for EEF projects that the grantee team, evaluation team, and EEF can work together in a respectful and supportive way to achieve the best results. Grantees should be professional and timely in their communications with other teams and should expect the same in return.
4. **EEF grantees must support the evaluation by attending two set-up meetings, an IDEA workshop (Implementation Delivery Evaluation and Analysis) and any other reasonable meetings.** They must also read the protocol, statistical analysis plan and final report, and should provide comments if they wish.
5. **EEF grantees should provide reasonable assistance to the evaluator.** This might involve:
 - a. discussing the research design with the Evaluator when requested and, in consultation with EEF, accepting amendments to the research design that are reasonably requested by the Evaluator and are necessary to achieve a more rigorous evaluation;
 - b. sharing with the Evaluator any data that has been collected during the project;
 - c. providing information required by the Evaluator’s ethical committee to approve the research design; and

- d. helping to ensure that schools contribute to the evaluation in accordance with the Memorandum of Understanding (e.g., by completing tests, or contributing to the process evaluation).
- 6. **It is essential that the grantee and evaluator communicate regularly, especially during school recruitment.** The grantee and evaluator need to share materials and provide each other with regular updates. If the intervention changes (e.g. the grantee decides to add another CPD session), the grantee must inform the evaluators and the EEF.
- 7. **EEF grantees are able to conduct and, where prior written approval has been provided by EEF, publish their own analyses of data collected during the research.** This work is subject to the provisions of the EEF Reports and Publications policy, and the grant agreement between the Grantee and the EEF.
- 8. **Any contribution made to the Evaluation by the Grantee will be supervised by the Evaluator.** This may include:
 - a. Any data collected by the grantee which will be used in the final EEF evaluation report;
 - b. Any assistance provided to the evaluator in the administration of tests.