

Regional Partnership Evaluation Plan
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PROJECT TITLE	Education Endowment Foundation Regional Partnerships Evaluation
EVALUATOR (INSTITUTION)	University of Warwick, University of Nottingham, Manchester Metropolitan University
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EVALUATION PLAN AUTHOR(S)	Dr Thomas Perry, Dr Geoffrey Lewis
NUMBER OF SCHOOLS/ SETTINGS	~218-232 schools across 8 regional partnerships

Evaluation plan version history

VERSION	DATE	REASON FOR REVISION
1.0	16.7.26	Current version – original submission

Intervention

Regional partnerships are a core part of the work that EEF does with the Research Schools Network (RSN). They aim to help educators to implement evidence-informed approaches using school and system leaders' professional expertise and increase system capacity for using evidence. By using evidence-based approaches and supporting with implementation, the EEF aims to change educator and leader behaviour, which in turn will help close the attainment gap that exists between children from lower socio-economic groups and their peers.

Embedding and sustaining evidence use is complex and can be difficult to do in schools and other educational settings due to competing priorities and lack of support. Over the last 12 years the EEF has been trying out different approaches to support evidence use and have conducted several pilot evaluations of approaches:

- The [EEFective Kent Project](#) was a joint project with Kent County Council to support improvements in education. It included co-funding the purchasing of potentially impactful programmes, delivering training around a priority and developing research champions to embed and sustain evidence-based practice and leadership at multiple levels.
 - o The evaluation found that while teachers and leaders were attracted to attending training that was focused on their priorities and opportunities to develop professional networks in their area, the biggest barriers to effective delivery were having staff capacity and stakeholder misalignment.
- The [Regional Implementation Leads pilot in Bristol](#) was led by a partnership between EEF, West Somerset Research School and Bristol City Council. It aimed to develop and test an approach to support schools in building the culture, capacity and capability to successfully implement and sustain evidence-informed school improvement. Further, it sought to develop Regional Implementation Leads (RILs) to enable this and to establish an evidence-informed ecosystem in the city.
 - o The evaluation found some tentative evidence to support the theory that providing a sustained, integrated programme of training and support focused on using evidence-informed implementation processes to embed evidence-based practices is effective. However, limited progress was made in schools where there was a lack of senior leader support or where the school implementation lead did not have the authority to implement change.
- The [Making best use of teaching assistants campaigns](#) were pilots of two different approaches to mobilise the evidence from EEF's 2015 'Making best use of Teaching Assistants' guidance report. The first pilot in South and West Yorkshire commissioned a range of practice-based organisations to support schools in understanding and implementing the evidence. The second pilot in Lincolnshire embedded the scale-up work in existing school improvement initiatives and structures. The pilots involved a range of practical activities including conferences, training workshops, action planning activities and school-to-school support.
 - o The lessons learned summary of findings from the evaluations found that activities perceived to be effective included having active involvement to ensure fidelity to the evidence and advice on scale-up approaches, building a bank of resources as well as outlining some ways of working for effective partnerships.

It is from evidence from pilots like this and collective learning and expertise gained through extensive experience of supporting schools through previous iterations of partnerships and pilots that the EEF has developed this iteration of regional partnerships from 2023 onwards.

The aims of the regional partnerships are to:

- Support evidence-informed improvement in classroom practice through meaningful and sustained behaviour change
- Build the capacity of schools, settings and systems to be self-sustaining in their engagement with research evidence¹
- Develop coherence and co-ordination in the use of evidence, to support and complement local and regional school improvement approaches
- Exemplify evidence in action through deep, embedded partnerships that enable EEF to increase their understanding of evidence mobilisation², and share this learning with the wider sector.

To achieve these aims, EEF's partnerships approach is underpinned by six Partnership Foundations (see Appendix A).

Starting in 2023, areas in England were identified as a priority based on data showing where high numbers or proportions of FSM eligible pupils and lower than average attainment were, and/or there is a stubborn widening gap and if there has been little prior engagement with the RSN. Partnerships were then brokered via the Regional Delivery Lead (RDL) at the EEF and the system leaders for the area identified. Often this was the local authority, but sometimes this was a multi-academy trust (MAT), or both.

The partnerships have been broken down into two distinct stages:

1. Evidence Exploration Partnerships (EEP)

A scoping stage was delivered during the EEP over four workshops during the course of one academic year designed to support education settings and local system leaders to work together to identify a priority that can be effectively addressed and develop a solution to collectively address it.

The workshops were jointly led by the RDL and Research School and attendees usually included school leaders, MAT central teams and/ or local authority leaders and sometimes other organisations that support schools and/ or children in the local area. Using data and other available evidence the group identified and agreed on a shared priority before using research evidence to consider what approaches and support might be suitable to address the priority.

The workshops followed a structured, collaborative approach to gathering and analysing data, identifying priorities and potential solutions and planning for evaluation.

¹ In general, when the EEF is referring to evidence it is referring to research evidence – i.e. that from systematic study based on high-quality, robust evaluations. The EEF anticipates that it is necessary to combine research evidence with knowledge of settings and knowledge of pupils, as translation requires thoughtful navigation and combination with professional expertise of teachers and leaders.

² The EEF defines evidence mobilisation as efforts to get evidence to influence practice or decision-making in settings. This can include supporting evidence-use i.e. helping leaders use evidence to identify promising solutions; or more directly supporting the uptake of evidence-informed practices (i.e. programmes that embed evidence informed practices in the professional development). Mobilisation can be direct (communication to individual leaders or educators) or more indirect (such as developing resources, influencing policy decisions, or creating wider system conditions to be supportive of evidence-informed practice and/or the use of evidence). Mobilisation is not a linear process and should be multi-directional in terms of the influence, listening and working with teachers and leaders.

Workshop 1: Aimed to develop a shared understanding of research and evidence, shared understanding of partnership foundations and produce a clear plan for data collection in preparation for the next workshop.

Workshop 2: Participants reviewed the data and explore potential challenges before reaching a consensus on the challenge and overall aims of the partnership.

Workshop 3: Reviewed and refined the challenge, explored the evidence base and how best this challenge could be addressed by identifying specific behaviours and system enablers.

Workshop 4: Scoped supports needed to enable desired behaviours, finalised the theory of change, introduced EEF's approach to monitoring and evaluation and discussed plans for next steps.

The EEP concluded with a discussion of whether to take forward their plan with a proposal for EEF support and funding, or develop their own plans and/ or explore other available support.

2. Evidence into Action (EiA) partnerships

These are developed from EEPs, and delivery and monitoring and evaluation is supported by the EEF and RSN. They are delivered over two academic years. The first Phase started in academic year 2024/25, and the second in 2025/26.

They are each bespoke as they have been co-created during the EEP based on local priorities and capacity. However, there are four areas of Evidence into Action core content that underpin all partnerships: understanding disadvantage; effective implementation; effective professional development; and, evidence literacy. These are intended to support evidence-informed processes and the system capacity to be developed alongside the particular practice focus. Each partnership might prioritise these process areas differently depending on the needs identified and the areas of interest for the partnership. Common activities also include launch events, development and delivery of training to different audiences in the schools and system, implementation support, social support quality assurance and governance. Some partnerships are focused on one year group or key stage, whilst some are broader and span several key stages and sometimes cross-phase between primary and secondary.

Additionally, each partnership has an associated monitoring and evaluation (M&E) plan that is either enacted by the same Research School, or an additional Research School to support its design, delivery and/ or analysis. Partnerships develop their own research questions and associated evaluation plans to answer them and produce an End of Year M&E report, as well as a 'reflection' report at the end of each year. A central questionnaire (from EEF) aimed at stakeholders in each partnership is also distributed at three points (baseline, mid-point, end-point) to indicatively measure their progress against the Partnership Foundations.

Partnerships often have teams responsible for content creation, delivery of training, implementation support, quality assurance, project management and steering groups. Some of the individuals in these teams overlap, as there is usually a core group of people delivering the partnership. In some partnerships there are system actors actively involved in the delivery, including MATs, local authorities and Maths Hubs alongside the Research School responsible for delivering. Delivery plans developed at the start of the partnership outline these roles, expectations and time commitments.

In total, 19 EiA partnerships are being supported through the RSN and EEF: 11 started in 2024/25 and a further eight started in 2025/26. They span a variety of different themes, phases and delivery models. For Phase 1 this looks like:

EiA Partnership	Region	Phase/ Key-stage	Theme
Manchester	North West	Reception & KS1	Writing
Lancashire	North West	EY (FS2)	Communication & language
Stockport	North West	EY & KS1	Oral language
Wiltshire	South West	EY (FS2)	Communication & language
Gloucestershire	South West	KS2 & KS3	Writing
Dudley	West Midlands	KS1 & KS2	Reading Comprehension
Worcestershire	West Midlands	Cross-phase	Leading literacy
Cambridgeshire	East	EY & KS1	Language & Communication
Southwark Diocese Board of Education	London	KS2	Disciplinary Reading
Havering	London	KS2 & KS3	Adaptive Teaching (Scaffolding & Assessment in reading)
Leeds	Yorkshire	KS1	Social & Emotional Learning

For Phase 2 this looks like:

EiA Partnership	Region	Phase/ Key-stage	Theme
St Barts	West Midlands	KS2	Maths
Wirral	North West	KS2/3	Maths/ adaptive teaching
East Coast Collective	East & East Midlands	KS2	Leadership and choice of: EFA ³ ; Power of Reading; Effective Scaffolding
Enfield	London	KS2/3	Reading comprehension
Hillingdon	London	EY/ KS1	Language and vocab
East Riding of Yorkshire	Yorkshire	EY/ KS1/ KS2	Metacognition in planning writing
Somerset	South West	KS2	Maths
Northumberland	North	EY/ KS1	Maths

The number of schools for Phase 2, which this evaluation will focus on for primary data collection, is between 218-232.

In 2025 the EEF developed a draft theory of change (see Appendix B) which gave an initial outline of the evaluation theory and identified some key hypotheses to further refine and test through the evaluation before commissioning an external evaluation of the regional partnerships.

Evaluation Aims and Design

Overview and Aims

EEF's Regional Partnerships (RP) model is both significant and timely, with strong potential to drive sustainable, system-level change. This evaluation examines the RP model, with a primary

³ Embedding Formative Assessment

focus on the eight Phase 2 Evidence into Action (EiA) partnerships. The evaluation adopts a theory-based, mixed-methods design. It aims to generate robust evidence on whether, how, and under what conditions the RP model supports more effective use of evidence within and across educational systems. It is therefore aligned with the EEF's aims to generate and apply rigorous evidence to improve educational outcomes, particularly for socio-economically disadvantaged pupils⁴. The findings will inform future partnerships, the EEF's ongoing work, and have wider international significance for research, policy, and practice, through generating insights into evidence mobilisation at scale.

The evaluation methodology is designed to be innovative, co-constructed, and responsive to the complexity and evolving activities of the RP model and individual partnerships. The evaluation will assess the multiple, inter-connected layers and components of the RP model, encompassing evaluation of changes in teaching practice, professional development, leadership and partnership processes, and the mobilisation of evidence, with particular attention to implications for disadvantaged pupils and system capacity. The evaluation is structured through three interrelated areas: (A) evidence-informed teaching and professional development, (B) leadership and partnership processes, and (C) the mobilisation and use of evidence. As well as producing robust and relevant insights, the evaluation will develop and codify a reusable model for **theory-based evaluation (TBE)** in applied education contexts.

Theory-Based Evaluation

TBE is concerned with making explicit the causal components, pathways and assumptions about how an intervention produces outcomes, and then testing these against empirical evidence (Fitz-Gibbon & Morris, 1996; Weiss, 1997; Chen, 2014). In this context, it draws on approaches commonly associated with implementation and process evaluation, including attention to delivery, experience, and context. However, TBE extends beyond descriptive or diagnostic accounts of implementation by focusing on developing and testing causal explanations. Specifically, TBE uses a **Programme Theory** not only to describe how an intervention unfolds as a process, but to articulate and test explanatory propositions about how it works, for whom, and in what circumstances.

Given the complexity and context-dependence of RPs, a simple input–output model is insufficient. Instead, we adopt a realist approach (Pawson & Tilley, 1997; Hawkins, 2016), specifying and testing causal propositions about how outcomes arise through the interaction of mechanisms (M) and contexts (C) (for example, how the resources offered by a professional development approach reshape teachers' reasoning and practice (M) and how this differs across schools with different levels of leadership support (C)). The focus on understanding mechanisms operating in contexts, is part of the realist evaluation approach and provides a structured way of formulating and testing causal propositions across cases, enabling us to interrogate causal claims, identify the conditions under which mechanisms are activated, and iteratively refine the Programme Theory.

The realist context-mechanism-outcome structure is now well established within contemporary evaluation and implementation research as an approach to developing explanatory causal theory, particularly in complex social interventions where causal processes are contingent and context-dependent (Coryn et al., 2011; and see May et al., 2022, for an application in the context

⁴ <https://educationendowmentfoundation.org.uk/about-us/how-we-work>

of implementation science). In this sense, the approach complements more traditional designs focused on estimating if an intervention works, by providing insight into how and why outcomes are generated in practice. It also extends conventional implementation and process evaluation by placing greater emphasis on explicitly theorised mechanisms, their interaction with context, and their systematic testing across cases, providing a more structured and cumulative basis for causal explanation.

Programme Theory

Our theory-based approach develops, refines and tests a Programme Theory (PT) to understand how Regional Partnerships support evidence mobilisation and school improvement. The RP Programme Theory is designed to be a ‘middle-range’ theory – that is, an explanatory theory that sits between highly abstract general theory and context-specific description or ‘theory of action’ (Brown & Flood, 2018), specifying how particular mechanisms operate across different settings (Perry & Morris, 2023, see pp. 22–25).

The PT provides the central analytic framework for the evaluation, specifying both the key processes through which RPs are expected to unfold and the underlying causal mechanisms through which they generate outcomes. The initial PT was developed during the exploratory Stage 1 through a **Theory and Evidence Review** (see next), synthesising relevant research, policy, and practice literature on evidence mobilisation, professional learning, and system change. This provided an evidence-informed foundation for specifying the key mechanisms, contextual conditions, and expected outcomes associated with the RP model.

The PT builds on the EEF’s existing Theory of Change (ToC) (Appendix B), which provides an initial high-level representation of the model. During the exploratory Stage 1 of the evaluation, this has been developed into a more detailed, multi-layered framework specifying key mechanisms, contextual conditions, and expected outcomes. The evaluation is centred on testing and refining this PT, which comprises two complementary components: **context-mechanism-outcome configurations (CMOCs)** and an associated **Theory of Change (ToC)**.

- **CMOCs** provide the primary explanatory component of the PT. They are paragraph-length, structured statements focused on the overall partnerships model and on how its core components (e.g. professional development, evidence-informed planning, classroom implementation) are understood to work individually and in combination. Each CMOC sets out a hypothesis by specifying: (i) the mechanisms through which a component is expected to operate, (ii) the contextual conditions under which these mechanisms are likely to be activated, and (iii) the proximal outcomes and indicators that follow. In this way, CMOCs articulate and test causal propositions across cases.
- **The ToC** provides the complementary process-oriented component of the PT. It focuses on what is expected to take place over time, describing the stages through which each partnership is expected to progress – from design and planning, through implementation, to impact and longer-term change. It closely reflects partnership delivery plans and timelines, and provides a structured account of implementation against which variation can be assessed and interpreted.

For ease of reference, we refer to the CMOCs and ToC collectively as the PT. The central aim of the evaluation is to test and refine this PT by examining how partnership components operate in practice, and how outcomes vary across contexts, stakeholder groups, and intended aims.

Analytically, this involves moving from description to explanation and, where the evidence allows, to the corroboration of key elements of the PT.

Theory and Evidence Review

The initial PT has been developed through a focused **Theory and Evidence Review**. This synthesises relevant research, policy, and practice literature on implementation (Moore et al., 2024), professional development (Sims et al., 2021), and evidence-based practice (Coldwell et al., 2017; Greany & Hudson, 2023), including cognitive science in the classroom (Perry et al., 2021). To understand how these operate in the context of evidence-informed partnerships, it also draws on learning from the EEF's own pilots of regional approaches (see p.2), literature on evidence mobilisation and research-practice partnership in England and internationally (e.g., Greany et al, 2025; Farrell et al., 2022; Henrick et al., 2017; Campbell et al., 2017; Ovenden-Hope & la Velle, 2015) and the EEF RP documentation and internal design work, including the EEF's initial RP ToC (see Appendix B) and Guide to Regional Partnerships⁵, including the 'partnership foundations': Collaborative, Aligned, Co-ordinated, Evidence-led, Supportive, and Sustainable (See Appendix A).

The outputs of this review are synthesised into an initial Programme Theory, comprising a set of mechanism group statements (CMOCs) and an associated ToC, which is presented in Appendix C. This represents a preliminary, theory-informed specification of how Regional Partnerships are expected to operate, grounded in existing evidence and early programme design. Consistent with the theory-based and realist approach outlined above, this Programme Theory is not treated as fixed; rather, it provides the starting point for empirical testing and iterative refinement throughout the evaluation. The following section sets out how this initial PT will be operationalised through an **Evaluation Framework**, which specifies the methods of data collection and analysis and their alignment with the aim of testing and developing the PT.

Evaluation Framework

The Programme Theory (PT), developed through the initial exploratory stage of the evaluation, provides the central analytical framework for the evaluation. The next stage of the evaluation ('co-construction') is to operationalise this PT into a detailed **Evaluation Framework** that specifies how its components will be examined empirically. The Evaluation Framework will map the key elements of the PT onto research questions, data sources, methods, and analytic strategies. In doing so, it will provide a clear and systematic account of how the evaluation will test, refine, and extend the PT.

At the point of producing this study plan, the Evaluation Framework is not yet specified. This reflects the deliberately staged and co-constructive design of the evaluation (see below), in which detailed methodological specification follows initial theory development and engagement with partnerships. While the PT has been developed through theory and evidence review, the detailed specification of methods, instruments, and analytic procedures will be undertaken during the next (co-construction) stage of the project through structured engagement with Regional Partnerships, the EEF, and other stakeholders. This staged approach serves two purposes. First, it ensures that the evaluation remains closely aligned with the realities of partnership design, delivery, and context, rather than imposing a fixed methodological model in

⁵ <https://educationendowmentfoundation.org.uk/networks/eef-regional-support/working-in-partnership-a-guide-to-regional-partnerships-in-the-eeef>.

advance. Second, it enables the evaluation to integrate with existing monitoring and evaluation activity within partnerships, minimising burden and maximising coherence. The full Evaluation Framework will be published by December 2026.

This Study Plan therefore sets out the overall design, logic, and intended methods of the evaluation. This includes research questions, and a general design for the stages of data collection. It also provides an outline and the preliminary plans for case studies, methods and analysis. Full specification and finalisation of instruments, measures, and analytic procedures will be provided by the Evaluation Framework developed in Stage 2 of the evaluation.

Before setting out the research questions and plans for recruitment, data collection, and analysis, three further aspects of the overall evaluation design require clarification. These are: (i) the mixed-methods and differentiated design, which sets out how breadth and depth of evidence will be achieved across partnerships; (ii) the overall approach to theory development and testing, which explains how the Programme Theory will be examined and refined at the level of analysis; and (iii) the co-constructed and partnership-based approach, which underpins both the design and delivery of the evaluation. These will be addressed in turn.

Mixed Methods and Differentiated Design

Consistent with the theory-based and realist orientation of the evaluation, a mixed-methods design is used to capture both breadth and depth in testing the PT. Our approach is informed by recent advances in mixed methods methodology, which emphasise coherence across all stages of research design – from orientation and purpose through data collection, analysis, and synthesis – and the importance of integration (of data, design components, analysis and reporting) as the defining feature of effective mixed methods inquiry (Perry et al., 2026). This enables us to combine evidence from diverse sources in a structured way, ensuring that theory testing is both rigorous and cumulative.

Data will be collected across all partnerships, alongside more intensive case studies of selected partnerships and mechanisms. Core activities will run across all partnerships, using existing monitoring and evaluation (M&E) data, partnership documentation, and common elements of the ToC. These will enable us to produce eight **case studies**, one for each partnership, aligned through common evaluation questions and data, tailored to each partnership during the co-construction Stage 2 of the evaluation.

We will account for staged roll-out of partnerships (e.g. Stage 1 EEP and Stage 2 EiA cohorts) by drawing evidence from all partnerships, while focusing primary data collection on partnerships where delivery is actively underway during the evaluation period. Differentiation will also reflect context: some partnerships are small or early-stage, others larger with established infrastructures, creating different conditions for capacity-building.

Alongside this, we will undertake intensive case studies of specific aspects of the PT where partnership activity offers opportunities to generate robust CMOC evidence. We will refer to these as ‘**areas of interest**’ to distinguish them from the overall partnership cases. Areas of interest will align to aspects of the initial PT (Appendix C) and relate to the three evaluation areas (Evidence-informed Teaching and Professional Development (Area A); Leadership and Partnership Processes (Area B); and Evidence Mobilisation (Area C); selected purposively to target key PT elements and partnership stages. We have outlined our approach to identifying areas of interest below. These will be finalised within the Evaluation Framework. We expect the

areas of interest to draw on a subset of or even single partnerships, and use a combination of in-depth or focused analysis of extant data, and new data collected specifically to examine a particular aspect of the PT.

Theory Development and Testing

Theory development and testing in realist evaluation involves consideration of mechanisms operating within contextual arrangements such as leadership structures, school/MAT priorities, local capacity, and policy environments: what Pawson (2013) describes as the “four Is” of infrastructure, institutions, inter-personal relations, and individuals. Our analysis will therefore focus on how these arrangements interact with mechanisms to produce (or block) change. Our approach will examine *what* contextual factors are present, and *what contextual arrangements do* to enable or hinder the enactment of mechanisms (Greenhalgh & Manzano, 2022). Analytically, the realist logic combines more than one mode of inference. We reason deductively in deriving testable propositions from the initial PT; inductively in identifying patterns across cases; and abductively/retroductively in inferring the mechanisms and contextual conditions that would best explain those patterns. These operate iteratively across the develop-and-test cycle rather than in sequence.

The evaluation also adopts a ‘best evidence’ approach to theory testing, in Slavin’s (1986) sense of drawing on the strongest causal evidence available to inform practice and synthesis. In this approach, evidence is selected and weighted according to its methodological strength and relevance to each component of a theory, prioritising studies with higher internal and external validity where available, while incorporating other forms of evidence where experimental or quasi-experimental designs are limited, indirect or not feasible. In practice, this means that via the **Theory and Evidence Review** the evaluation will draw on causal evidence from the wider literature and EEF evidence base (e.g., for CPD and implementation mechanisms) where available, while also generating empirical evidence that contributes to the development and testing of causal explanations.

Through the structured analysis of CMOCs, cross-case comparison, and the testing of the pre-specified, theoretically-derived expectations within the PT, the study will examine whether hypothesised mechanisms operate as anticipated, under what conditions, and with what observable consequences. Where appropriate, alternative explanations will be explored and adjudicated through methods such as process tracing and realist-informed comparison. Overall, this approach supports a pluralist⁶ and cumulative view of causal inference, in which experimental, quasi-experimental, and observational evidence are integrated with theory-driven analysis to build a robust and actionable account of how regional partnerships generate change. In following this approach, we draw on methodological research into social scientific research evaluation, including our own work (Perry & Morris, 2023; Coldwell, 2019; Outhwaite et al., 2019; Peterson, 2016). Further specification of the analytic procedures will be set out in the Evaluation Framework.

Co-constructed and partnership working

A key implication of the RP design and governance in general, and the partnership-level monitoring and evaluation (M&E) activity in particular, is that elements of the Evaluation

⁶ i.e., It is productive to employ and combine multiple sources of evidence, and forms of explanation and inference to develop and test theory.

Framework require co-construction with partnerships and cannot be fully specified in advance. In this evaluation, co-construction is embedded in both design and delivery. We will align independent data collection with existing EEF and partnership M&E data, creating a shared framework that reduces duplication and maximises value. Methods such as workshops, theory-driven interviews (Pawson, 1996), and systematic review of partnership self-evaluations will ensure stakeholder perspectives shape data collection, interpretation, and recommendations. By sequencing evidence collection with partnership stages, and involving EEF staff, Research Schools, and partnership leads in sense-making, we will combine rigour with participatory working. This approach will build trust, ground findings and enhance uptake.

One methodological aspect of this approach is that these co-constructed, open and participatory evaluation activities are partly formative, shaping and informing partnership work as well as assessing it. Two evaluation design implications follow: First, we will systematically document and reflexively assess the ways in which the evaluation itself may influence partnership activity, so that our role is made visible and analytically explicit. Second, CMOCs will be specified and tested in ways that remain robust to this influence; mechanisms will be defined such that any evaluative feedback, challenge, or oversight is either treated as part of the mechanism itself or examined as a contextual condition that varies across partnerships.

Research questions

The evaluation is structured around three interrelated areas: evidence-informed professional development and classroom practice (Area A); leadership and partnership processes (Area B); and the role and mobilisation of evidence (Area C). This framing recognises that meaningful, sustainable change depends on the interplay between these areas. It also provides a practical framework for organising primary and secondary data collection and analysis, and ensuring that we co-construct and draw on perspectives at every level: from pupils and teachers through to school leaders, partnership leads, and regional interest-holders. The evaluation's research questions align with this structure, ensuring full coverage of the EEF's priorities for the research, including understanding how regional partnerships support evidence-informed practice, strengthen system capacity, and contribute to improved outcomes for disadvantaged pupils, while also drawing out conceptual and comparative insights. The three evaluation areas and associated research questions are set out below. We have also mapped these onto the intended methods for the evaluation case studies and areas of interest (see Table 4).

A. Evidence-informed Teaching, Professional Development, and Pupil Outcomes

Investigates what is changing in teaching practice, how professional learning is influencing pedagogy and curriculum, and whether there are early indications of benefits for pupils.

- A (i) What teaching practices, pedagogical approaches, or curricular priorities are schools implementing as part of the initiative?
- A (ii) How are these practices being introduced and supported through professional development and school-level processes?
- A (iii) In what ways do teachers draw on professional expertise to adapt or embed evidence-informed practices?
- A (iv) What factors contribute to practice changes becoming embedded and sustained in day-to-day teaching across partnerships?

- A (v) Are there observable or reported early benefits for pupils linked to these changes, and how are these benefits distributed across pupil groups, including disadvantaged pupils?

B. Leading and Sustaining Partnerships and Ecosystems

Examines how research schools, system leaders, and school leaders collaborate to implement and refine activities, and the role of co-production and buy-in across interest-holders.

- B (i) How are partnerships designed, led, and implemented across different contexts?
- B (ii) What roles do research schools, school and system leaders, and the EEF play in supporting the initiative at different stages (scoping, design, implementation, monitoring, and evaluation)?
- B (iii) How do leaders at different levels secure and sustain buy-in from schools and staff, and what forms of support are most effective at each stage of partnership development?
- B (iv) To what extent are partnerships co-produced with interest-holders, and how does this affect feasibility and engagement?
- B (v) What factors contribute to the feasibility and long-term sustainability of partnerships, and how can the model be adapted to embed evidence-informed processes while making best use of available resources?

C. Mobilisation and Implementation of Evidence

Takes a cross-cutting perspective on the role of evidence in shaping CPD, teaching, and partnerships, drawing lessons about effective processes of evidence mobilisation, interpretation and use.

- C (i) What kinds of evidence are being used across different partnerships, and how are they selected and interpreted?
- C (ii) How is evidence mobilised in CPD, curriculum, and classroom change?
- C (iii) How is evidence mobilised in leadership, partnership design, and ecosystem-building?
- C (iv) What challenges and opportunities arise in adapting and applying evidence across diverse schools and contexts?
- C (v) What cross-partnership insights can be drawn about effective and efficient models of mobilising evidence for practice and leadership, and how might these inform future EEF approaches?

Together, these three areas form a coherent framework for the evaluation and a layered approach to provide robust insights into whether, how, and under what conditions regional partnerships support sustainable, evidence-informed improvement.

Methods

Recruitment

The evaluation will involve a broad and diverse sample of participants across multiple levels of the eight Regional Partnerships, including teachers, CPD leads, school leaders, system leaders, Research School Network staff, and EEF delivery staff. The largest group of participants will be teachers, contributing primarily through surveys alongside a smaller number of interviews and

observations. Additional participants will contribute through interviews, workshops, surveys, and network-mapping activities, depending on their role and level of involvement in partnership activity. Table 1 summarises the anticipated scale and distribution of participants across roles, with an estimated total of approximately 600–900 unique participants, noting that some overlap across roles is expected.

The specific methods through which participants will contribute will vary across partnerships and evaluation activities, reflecting the co-constructed design of the evaluation and alignment with existing monitoring and evaluation processes. As such, methods are not fixed at this stage and will be specified in detail within the Evaluation Framework.

Table 1. Estimated number of participants and roles across all research activities

Type of Participant	Role / Description	Estimated Number Across All Research Activities
Teachers	Classroom teachers involved in CPD or implementation activity	~350-600
CPD Leads / T&L Leads / Specialist Practitioners	Those developing/delivering CPD or coaching	~10-20
School Leaders	Senior leadership (e.g., headteachers, deputies, department heads)	~40-60
System Leaders	MAT leads / Local Authority partners / other system actors	~20-30
Research School Network Staff	Partnership coordinators and facilitators supporting delivery	~15-20
EEF Regional Delivery Leads and project staff	Supporting model design and national/regional coherence	~10-12

A purposive sampling strategy will be used. Participants will be selected to ensure representation across roles, settings, and levels of involvement in Regional Partnerships (e.g. teachers, CPD leads, school leaders, Research Schools, partnership leads, and local/system actors). In addition, variation sampling will be applied to ensure the evaluation captures diverse contextual conditions across school phases, MAT and LA structures, and regions at different stages of the partnership process (e.g. early-stage versus more established partnerships, different delivery models, and varying levels of leadership capacity and alignment). We will also seek to capture variation in levels of disadvantage and pupil outcomes (e.g. pupil premium eligibility rates and attainment gaps), where this is relevant to partnership focus and available data.

Eligible participants will be professionals who are directly involved in, or supporting, activity within one of the EEF's eight Regional Partnerships. This includes individuals working in schools, trusts, local authorities, and partner organisations who contribute to the design, delivery, coordination, or participation in partnership activity, such as evidence-informed professional development, curriculum, or improvement initiatives. It also includes individuals with regional or national roles that support partnership delivery or coherence, such as Research School Network staff and EEF Regional and National Delivery Leads. Participants will be recruited at the individual level, but sampling will be structured to ensure coverage across a range of schools within each partnership, with multiple participants drawn from selected schools where appropriate to capture different roles and perspectives. Individuals will be excluded if they are not employed in,

or directly supporting, an organisation involved in one of the eight Regional Partnerships, or if they have no substantive role in partnership-related activity. This includes individuals without involvement in the implementation, delivery, coordination, or support of partnership CPD, curriculum, leadership, or evidence-use processes.

Recruitment will be coordinated through the existing structures of the eight Regional Partnerships, making use of their established communication channels to ensure that engagement is proportionate, transparent, and low burden. Partnership leads, such as Regional Delivery Leads, Research School Directors, MAT representatives, and Local Authority partners, will serve as first points of contact, helping to identify potential participants and share information about the study through their usual communication routes. An information flyer will be provided for these organisations so that participants are aware of the aims of the evaluation taking place within their partnership. Following this and wherever possible, the research team will then seek to liaise directly with potential participants to ensure that information about the study is communicated fully and accurately.

The proposed sample size is designed to support the construction, testing, and refinement of the programme theory. Qualitative samples, including interviews, case studies, and observations, are sized to support analytic rather than statistical generalisation, enabling in-depth examination of implementation processes. Survey samples will be sufficiently large to enable cross-partnership and cross-wave comparison, providing breadth across professional groups. Qualitative data collection will continue until meaning saturation is reached within and across partnership case studies, operationalised through an iterative analytic process in which data are reviewed alongside the emerging coding framework and CMOCs. Saturation will be judged to have been reached when additional data no longer generate substantively new themes, mechanisms, or variations in context–mechanism–outcome relationships, and when existing categories are sufficiently well developed and evidenced across cases. This will be monitored through regular analytic reviews within the research team, using coding summaries and cross-case comparison to assess whether further data collection is likely to add explanatory or evidential value.

Sampling sufficiency depends on the specific method, intended analysis, and possibility of selection biases within the sample. For example, an analysis of observations designed to illustrate within-classroom teacher judgements connected to an evidence-based pedagogical technique might achieve theoretical saturation within 15 observations; cross-partnership survey items to support a cluster analysis of attitudes to evidence use may require 300 or more responses; and an analysis of successful implementation of a pedagogical technique within a single partnership may be achieved through secondary analysis of 20-30 implementation monitoring visit summaries, but the key sampling concern will be the representativeness of the responses and eliminating selection bias as a threat to validity for the judgement. Sampling targets and specifications will be provided connected to specific methods of analysis and data collection within the Evaluation Framework.

Evaluation Stages

The evaluation will progress through a series of linked data collection stages, each building cumulatively towards the overall aim of developing, refining, and testing the PT. Rather than treating data collection as a single, undifferentiated activity, the design deliberately sequences exploratory, co-constructive, and explanatory work. Early stages focus on refining theory and

developing instruments in light of partnership context and practice, while later stages generate and interrogate empirical evidence to test, elaborate, and refine the PT. These stages are summarised in Table 2 below, and then detailed in the sections that follow.

Table 2. Overview of Evaluation Stages

Stage	Purpose	Key Activities	Data Sources	Outputs
Stage 1: Explore and refine <i>Jan – April 2026</i>	Establish conceptual and empirical foundations; produce Programme Theory (PT)	Early fieldwork; partnership engagement; observations; document review; theory and evidence review; development of partnership overviews	Initial observations; partnership documentation; planning materials; literature and prior evidence	Initial PT (Appendix C); partnership overviews (internal)
Stage 2: Co-construction and Evaluation Framework development <i>May – August 2026</i>	Translate PT into operational design; align methods with partnership contexts	Structured evaluation planning with partnerships and EEF; co-design of methods; development of Evaluation Framework; instrument design; database construction	Partnership documentation; M&E outputs; artefacts; stakeholder input; emerging framework-linked data requirements	Evaluation Framework; research instruments; structured evaluation database
Stage 3: Main data collection and analysis <i>Sep 2026 – July 2027</i>	Generate empirical evidence to test and elaborate PT	Primary data collection (surveys, interviews, observations, network mapping); continued database development; initial within- and cross-case analysis; areas of interest	Primary data + evaluation database (documents, M&E, artefacts)	Multi-level dataset; initial analysis; evidence on mechanisms and contextual variation
Stage 4: Analysis, synthesis, and theory refinement <i>May 2027 – Apr 2028</i>	Integrate evidence to test, refine, and revise PT	Systematic application of Evaluation Framework; cross-case synthesis; development of case studies and areas of interest; targeted follow-up (if needed)	Full dataset from Stage 3 (primary + secondary)	Refined PT and ToC; tested CMOCs; case studies; areas of interest; final explanatory account

Stage 1: Explore and refine

Stage 1 establishes the conceptual and empirical foundations for the evaluation. Its primary purpose is not to generate summative findings, but to ensure that the subsequent stages of data collection and analysis are theoretically grounded, contextually informed, and proportionate to the complexity and variation of Regional Partnership activity. Given the evolving nature of the Regional Partnerships model, and the diversity of partnership structures, priorities, and stages of development, this initial stage is an essential foundation for developing an evaluation framework (see next stage) that it is both analytically rigorous and responsive to practice.

During this stage, the evaluation team have worked closely with the EEF and regional partnership management teams to develop this study plan, and the initial PT (Appendix C), both of which inform the evaluation framework development and subsequent data collection. Stage 1 therefore plays a critical role in moving the evaluation from an *a priori* model to a refined, operational theory that can be systematically tested. It has also collected initial data, primarily from observations of training and planning activities, and selected review of partnership documentation and resources. Activities are designed to: (a) build a robust understanding of partnership contexts, governance, and delivery models; and (b) identify the mechanisms that are most critical to the PT.

Early fieldwork and partnership overviews

Early fieldwork will focus on establishing a robust baseline understanding of partnership activity, context, and priorities across all Regional Partnerships. This stage is primarily exploratory and formative in orientation, and is designed to ensure that subsequent data collection and analysis are grounded in an accurate, nuanced understanding of how partnerships are configured and operating in practice. Given the diversity of partnership models, scales of activity, and stages of development, early fieldwork is a critical step preparing for the evaluation framework so that it is both analytically rigorous and responsive to local variation.

Early fieldwork will include initial meetings with individuals and organisations responsible for coordinating regional partnership activity (e.g., Regional Delivery Leads and Research School Directors); observations of partnership events and activities (e.g. project launches, CPD sessions, steering group meetings); review of partnership documentation and planning materials; and liaison with those responsible for monitoring and evaluation within each partnership, which raise awareness of the evaluation, build trust and understanding, and explore evaluation constraints and possibilities. These activities will enable the evaluation team to build an integrated picture of partnership governance, delivery models, evidence mobilisation strategies, and existing data flows, while also establishing shared understanding and lines of communication with key interest-holders.

Data collection during this stage will be structured around four core questions:

- (a) who is involved in the partnership and in what roles;
- (b) what activity is taking place and how it is organised;
- (c) how, why, and in what forms research evidence is being used; and
- (d) what organisational, structural, and contextual factors are shaping delivery.

These questions are designed to identify both formal design features and informal practices, and to identify early indications of variation in mechanisms, capacity, and alignment across partnerships.

Drawing on these sources, the research team will produce and internally discuss partnership overviews, with a view to planning for the co-constructed evaluation planning conversations in the next stage. These overviews will provide a concise but systematic account of the local context in which the partnership is situated, the model of evidence mobilisation being employed, the key research evidence being drawn upon, and the monitoring and evaluation processes already in place. They will also identify emerging lines of inquiry and priority mechanisms to be explored in greater depth during Stage 2.

Theory and evidence review

The initial Programme Theory has been developed through a focused theory and evidence review undertaken during Stage 1, as described earlier in this document. This work synthesised relevant research, policy, and practice literature alongside the preliminary mechanisms identified at the proposal stage, and is presented in Appendix C. The review provided the primary basis for specifying and refining the context–mechanism–outcome configurations (CMOCs) that underpin the evaluation. These CMOCs form the core analytical framework for subsequent stages, guiding the co-construction of the Evaluation Framework in Stage 2 and the empirical testing undertaken in later stages. The Theory and Evidence Review and associated CMOCs will continue to be refined throughout the evaluation as empirical data are collected and analysed. While the initial review provides the foundation for the evaluation, the process of testing and developing CMOCs may highlight some bodies of evidence as more relevant than others in explaining observed outcomes and mechanisms. The final report will therefore set out the evidential basis for the evaluation, integrating the empirical findings with the most pertinent literature identified through the Theory and Evidence Review.

Stage 2: Co-construction and Evaluation Framework Development

Stage 2 translates the Programme Theory developed in Stage 1 and exploratory partnership understanding (as per the partnership overviews) into a fully specified and operational Evaluation Framework. This stage is explicitly co-constructive in design, involving structured engagement with Regional Partnerships, the EEF, and other stakeholders to ensure that the evaluation is both analytically rigorous and closely aligned with partnership activity, context, and existing monitoring and evaluation processes.

The stage has two closely linked components: i) the co-construction of the Evaluation Framework and associated research instruments; and ii) the development of a comprehensive evaluation database drawing on partnership documentation, monitoring and evaluation outputs, and other relevant artefacts.

Co-construction of the Evaluation Framework and research instruments

The Evaluation Framework will specify how the Programme Theory will be examined empirically across subsequent stages of the evaluation. The framework provides a structured, theory-driven mapping between mechanisms, research questions, data sources, methods, and measures, ensuring that data collection and analysis remain tightly aligned to the Programme Theory.

The Evaluation Framework will be developed through a series of structured evaluation planning engagements with each Regional Partnership, and cross-partnership discussions and engagement with EEF colleagues. These activities will enable the evaluation team to align methodological design with partnership priorities, delivery models, and existing data collection processes, while maintaining coherence across sites.

For each priority mechanism, the Evaluation Framework will specify:

- a) the aspects of partnership activity or practice to be examined;
- b) the key outcomes of interest;
- c) the relevant data sources;
- d) the methods and instruments through which data will be generated; and
- e) the analytical approaches to be used at both data source and cross-case levels.

Research instruments such as surveys, interview schedules, observation protocols, and documentary analysis frameworks will be developed and refined within the Evaluation Framework. Instrument design will be explicitly theory-driven, with tools calibrated to different partnership models and stages of development while retaining a core set of common measures to support cross-partnership comparison, alongside flexibility to reflect local variation.

Development of the Evaluation Framework will also be informed by close attention to feasibility, participant burden, and alignment with existing partnership and EEF monitoring and evaluation processes. Draft instruments and methodological plans will be reviewed internally across the evaluation team and, where appropriate, piloted to check clarity, relevance, and usability.

Development of the evaluation database

In parallel with the development of the Evaluation Framework, Stage 2 will establish a comprehensive and structured evaluation database. This database will serve as a central repository for both primary and secondary data sources and will provide the empirical foundation for analysis in subsequent stages.

The database will include:

- a) partnership programme documentation (e.g. delivery plans, training materials, partnership ToCs, governance and planning documents);
- b) existing monitoring and evaluation outputs produced within partnerships;
- c) relevant underlying data from partnership M&E activity, where feasible and appropriate; and
- d) participant-generated artefacts, such as school-level planning documents, implementation materials, and locally developed theories of change.

The inclusion and use of these data sources will be guided by the emerging Evaluation Framework and agreed through the co-construction process, ensuring that data collection is proportionate, avoids duplication, and makes effective use of naturally occurring evidence (i.e., documents generated through partnership activity). The database will be organised to support systematic retrieval, comparison, and analysis across partnerships, enabling both within-case and cross-case examination of Programme Theory components. This approach recognises that a substantial proportion of relevant evidence already exists within partnerships and seeks to integrate these sources into the evaluation in a structured and analytically coherent way, rather than relying solely on new data collection.

Stage 3: Main data collection and analysis

Stage 3 will constitute the main period of primary⁷ data collection for the evaluation. It will implement the evaluation methods co-constructed, detailed and agreed within the Evaluation Framework in the previous stage. Data will be collected systematically across all three evaluation areas. This stage is designed to generate the primary evidence needed to test, elaborate, and refine the programme theory, while also providing robust descriptive and comparative insight into how Regional Partnerships are operating across different contexts and stages of development.

⁷ i.e., original data collected specifically for the purposes of the evaluation, rather than M&E and other partnership data that has been shared and collected in the evaluation data base for secondary analysis.

Data collection in Stage 3 will use a mixed-methods approach, combining quantitative and qualitative data sources to capture both breadth and depth. Core data collection activities will be implemented across all partnerships, using common instruments and protocols to support cross-partnership comparison and synthesis. As described above, more intensive data collection will be undertaken to examine areas of interest within selected partnerships, enabling in-depth examination of priority mechanisms and contextual conditions. Methods employed during this stage will include surveys, semi-structured interviews, focus groups, structured observations of professional development activity and partnership meetings, documentary analysis, and network-mapping activities, with the precise mix and emphasis tailored to each evaluation area and partnership context. See below for further details of the planned methods.

Alongside primary data collection, Stage 3 involves the continued development and systematic analysis of the evaluation database established in Stage 2. This includes partnership documentation, monitoring and evaluation outputs, underlying data (where available), and participant-generated artefacts. These sources provide a complementary and, in some cases, primary basis for examining implementation processes, contextual variation, and outcomes, and will be integrated with newly collected data to support comprehensive analysis.

By the end of Stage 3, the evaluation will have assembled a rich, multi-level dataset that provides the primary empirical foundation for cross-case comparison, theory refinement, and the more focused work to be undertaken in Stage 4.

Stage 4: Analysis, synthesis, and theory refinement

Stage 4 focuses on the systematic analysis and synthesis of evidence generated in Stage 3, applying the Evaluation Framework to produce a comprehensive assessment and refinement of the Programme Theory. This stage represents the culmination of the evaluation, bringing together primary and secondary data sources to test, elaborate, and revise the PT developed in earlier stages.

Analysis in this stage will be structured by the Evaluation Framework, enabling transparent and rigorous examination of mechanisms, outcomes, and contextual conditions across partnerships. This will involve both within-case and cross-case analysis, drawing on the full evaluation database alongside primary data collected in Stage 3. Particular attention will be paid to identifying patterns of consistency and variation, assessing the strength of evidence for different mechanisms, and examining how contextual factors shape their operation.

A key component of Stage 4 is the production of case studies and areas of interests within each partnership. These will draw on data collection and initial analysis in Stage 3 and developed further through systematic synthesis. Case studies will provide coherent, evidence-based accounts of how Regional Partnerships operate in different contexts, while areas of interest will examine specific mechanisms or components of the Programme Theory in greater depth. Together, these outputs serve both as sources of evidence for theory development and as rich illustrations of the Programme Theory in practice.

The primary analytical task in this stage is to refine and, where necessary, revise the Programme Theory. This involves assessing whether hypothesised mechanisms operate as anticipated, identifying the conditions under which they are activated or constrained, and specifying how mechanisms interact over time and across levels of the system. Where evidence is mixed or contested, alternative or rival explanations will be examined and adjudicated using the full range

of available data. While the emphasis in Stage 4 is on analysis and synthesis, limited and targeted follow-up data collection may be undertaken where required to resolve specific uncertainties or strengthen causal explanations. Such activity will be purposive and analytically driven, focusing on areas where additional evidence is needed to clarify mechanisms or contextual conditions.

Methods

Across all stages, the evaluation is expected to draw on a combination of qualitative and quantitative methods, including surveys, interviews, focus groups, observations of professional development activity, documentary analysis, and network-mapping tools. At this stage, the specification of methods is necessarily indicative rather than exhaustive. This reflects the deliberately staged design of the evaluation, in which the precise mix, emphasis, and operational detail of methods will be shaped by the outcomes of Stage 1 and Stage 2, particularly the theory and evidence review and the development of the Evaluation Framework described above.

Stage 1 plays a critical role in aligning methods at a detailed level with the refined ToC and CMOCs. Rather than fixing instruments and protocols in advance, the evaluation treats the careful mapping of research questions, mechanisms, data sources, methods, and measures as a substantive analytic task in its own right. The methods outlined below therefore set out the types of approaches that are anticipated and the roles they are expected to play within the evaluation, including both primary data collection and the use of existing monitoring and evaluation data where available. Full specification of instruments, measures, and their analytic use will be documented within the Evaluation Framework, with detailed tools provided separately as appendices. Table 4 maps how the data collected through these methods will be used to address the research questions.

Core case study methods (all 8 partnerships)

The table below sets out an indicative suite of methods for partnership-level case studies across all eight Regional Partnerships. It is intended to illustrate the range of mixed-methods approaches that would typically be used to examine the Programme Theory in depth, including the scale, focus, and analytic contribution of each method.

This specification should not be interpreted as a fixed or exhaustive data collection plan. Rather, it represents a reference model against which partnership-specific approaches will be developed. Through the co-constructed evaluation planning process described above, the evaluation team will work with each partnership to determine how far these data are already available through existing monitoring and evaluation activity and other naturally occurring sources, and where additional primary data collection is required. In practice, the final design in each partnership is expected to approximate this overall shape and coverage, while remaining proportionate and aligned to local context and existing evidence.

Table 3 – Indicative case study methods prior to co-constructed evaluation planning

Method	Indicative scale	What this covers	Primary analytic contribution
Partnership-level interviews	~8–10 per partnership	RDLs, Research School leads, MAT/LA partners, system leaders	Partnership design, leadership, governance, buy-in, sustainability
Teacher and CPD lead interviews	~6–8 per partnership	Teachers, CPD leads, T&L leads	Teacher learning, adaptation, embedding, professional judgement
Structured observations	~1–2 observed activities per partnership	CPD sessions, planning meetings, steering groups	Enactment of evidence, implementation processes, collaboration
Document analysis	~6–8 documents per partnership	Plans, CPD materials, ToCs, governance papers	Planned vs enacted theory, evidence use, alignment
Secondary analysis of partnership M&E outputs ¹	Varies by partnership	Partnership-generated M&E reports, slide decks, and summary analyses; where feasible, selective use of underlying data	Implementation progress, reach, participation, and early outcomes; primary evidence source in some cases; triangulation with primary data; variation across partnerships
Teacher survey	Cross-site (300–500 responses)	Teachers involved in partnership activity	Breadth on evidence use, confidence, reported practice change
Interest-holder survey	Cross-site (100–150 responses)	Partnership and system actors	Buy-in, legitimacy, perceived value
Partnership overview synthesis	1 per partnership	Integrated narrative + evidence map	Cross-case comparison and CMOC testing

¹ Collection and use of partnership monitoring and evaluation outputs will be proportionate and negotiated on a partnership-by-partnership basis, with the evaluation prioritising secondary analysis and triangulation rather than duplication of existing M&E activity.

Areas of interest within partnerships

Alongside the core data collection undertaken across all case study partnerships, the evaluation will identify opportunities for deeper inquiry into aspects of partnership activity that appear particularly distinctive, theoretically important, or potentially informative for understanding how Regional Partnerships operate and generate change.

These partnership-specific areas of interest are provisional and will be identified through the co-construction process undertaken during Stage 2, informed by the findings from Stage 1 and the evolving Evaluation Framework. They are not intended to constitute separate studies, but provide a flexible mechanism for pursuing targeted, theory-informed inquiry where particular partnerships offer opportunities to strengthen explanatory understanding of priority programme mechanisms, contextual influences, or implementation processes.

Potential areas of interest may include, for example, the ways in which research evidence is interpreted and mobilised; how evidence-informed approaches are adapted to meet the needs of disadvantaged pupils; how partnership priorities align with wider school improvement agendas; the challenges and opportunities associated with particular organisational or geographical contexts; or the processes through which practices become embedded and sustained over time. These examples are illustrative rather than exhaustive, and the precise

areas of enquiry will be agreed collaboratively with each partnership as part of the co-construction process.

Where appropriate, these areas of interest may involve additional or more focused data collection alongside the core case study activities, such as targeted interviews, observations, documentary analysis, workshops, or follow-up discussions. Wherever possible, the evaluation will draw on existing monitoring and evaluation evidence and other existing data before undertaking additional primary data collection. In some cases, the additional inquiry will reflect a more focused analytical lens applied to data already being collected rather than representing substantial additional fieldwork.

For each partnership, the Evaluation Framework will identify any agreed areas of interest, the rationale for their inclusion, the programme theory components or evaluation questions they are intended to illuminate, and any additional data collection or analysis required. This approach allows the evaluation to maintain methodological consistency across partnerships while retaining the flexibility to investigate distinctive features and emerging questions where these offer particular opportunities to strengthen explanatory insight.

Research Question to Study Methods Mapping

The core case study methods outlined above are brought together in Table 4, which provides an integrated overview of how data collection and analysis are aligned to the evaluation's research questions. The table maps the contribution of different data sources and methods to specific questions and Programme Theory components, illustrating how evidence will be combined across methods and partnerships. As with the methods described above, this mapping is indicative and will be refined through the co-constructed Evaluation Framework to reflect partnership-specific contexts and the availability of existing M&E data.

Table 4 – Method-Question Mapping

Core case study methods mapped against research questions	Core Case Study Methods (all 8 partnerships)						
	Partnership-level interviews	Teacher and CPD lead interviews	Structured observations	Document analysis	Teacher survey	Interest-holder survey	Partnership overview synthesis
Evaluation Questions							
A. Evidence-informed Teaching, Professional Development, and Pupil Outcomes							
A1 What teaching practices, pedagogical approaches, or curricular priorities are schools implementing as part of the initiative?	✓	✓		✓	✓		✓
A2 How are these practices being introduced and supported through professional development and school-level processes?	✓	✓			✓	✓	✓
A3 In what ways do teachers draw on professional expertise to adapt or embed evidence-informed practices?		✓			✓		
A4 To what extent are practice changes becoming embedded and sustained in day-to-day teaching?		✓			✓	✓	
A5 Are there observable or reported early benefits for pupils linked to these changes?		✓			✓	✓	
B. Leading and Sustaining Partnerships and Ecosystems							
B1 How are partnerships designed, led, and implemented across different contexts?	✓		✓	✓		✓	✓
B2 What roles do research schools, school and system leaders, and the EEF play in supporting the initiative at different stages (scoping, design, implementation, monitoring, and evaluation)?	✓		✓		✓	✓	✓
B3 How do leaders at different levels secure and sustain buy-in from schools and staff, and what forms of support are most effective at each stage of partnership development?	✓	✓	✓		✓	✓	✓
B4 To what extent are partnerships co-produced with interest-holders, and how does this affect feasibility and engagement?	✓	✓			✓	✓	✓
B5 What factors contribute to the feasibility and long-term sustainability of partnerships, and how can the model be adapted to embed evidence-informed processes while making best use of available resources?	✓	✓	✓	✓	✓	✓	✓
C. Mobilisation and Implementation of Evidence							
C1 What kinds of evidence are being used across different partnerships, and how are they selected and interpreted?	✓	✓	✓	✓			✓
C2 How is evidence mobilised in CPD, curriculum, and classroom change?	✓	✓	✓	✓	✓		✓
C3 How is evidence mobilised in leadership, partnership design, and ecosystem-building?	✓		✓	✓			✓
C4 What challenges and opportunities arise in adapting and applying evidence across diverse schools and contexts?	✓	✓	✓		✓	✓	✓
C5 What cross-partnership insights can be drawn about effective and efficient models of mobilising evidence for practice and leadership, and how might these inform future EEF approaches?	✓	✓	✓	✓	✓	✓	✓

Measures

Measures will be specified as part of the Evaluation Framework developed in Stage 2, where they will be aligned to the context–mechanism–outcome configurations (CMOCs) that underpin the Programme Theory. Rather than defining a fixed set of measures in advance, the evaluation adopts a theory-driven approach in which measures are identified in relation to specific mechanisms and outcomes, drawing on a combination of existing indicators, structured survey items, and systematically analysed qualitative data. Full specification of measures, including their rationale and analytic use, will be provided within the Evaluation Framework.

Data analysis

Analysis will be structured by the Programme Theory and implemented through the Evaluation Framework developed in Stage 2, which aligns research questions, data sources, methods, and context–mechanism–outcome configurations (CMOCs). Within this framework, data from multiple sources will be analysed using appropriate quantitative and qualitative techniques and brought together through structured, mixed-methods synthesis.

The primary analytical task is to examine whether hypothesised mechanisms are present, how they operate in different contexts, and with what observable outcomes, while also identifying and refining alternative or emergent explanations. Full specification of analytic procedures, including coding frameworks, indicators, and approaches to cross-case comparison and synthesis, will be set out in the Evaluation Framework.

Outputs

The primary output from the evaluation will be a final report to the Education Endowment Foundation, produced in line with the reporting requirements and overall project timetable (see below). This will synthesise findings across the three evaluation areas and present a refined Theory of Change for the Regional Partnerships model, supported by evidence from across the evaluation.

In addition to the final report, we will work with the EEF to agree the most appropriate mix and timing of interim and supplementary outputs. This may include interim reporting to support programme learning, as well as opportunities to develop additional outputs that help communicate emerging findings, such as technical annexes, summary briefings, or contributions to guidance reports or related EEF publications. The precise form and purpose of these outputs will be agreed collaboratively with the EEF to ensure they are proportionate, useful, and aligned with wider dissemination and impact goals, and consistent with the staged evaluation timeline set out below.

Ethics and registration

Ethical review by the Humanities & Social Sciences Research Ethics Committee (HSSREC) at the University of Warwick will align with the staged structure of the project outlined above. Activities undertaken in Stage 1 have received full approval. Approval for Stage 2 and Stage 3 activities will be sought in Summer 2026, once finalised in the Evaluation Framework. The project's Principal Investigator is an ONS-accredited researcher and receives institutional training and updates on data security and GDPR compliance.

Data protection

We will abide by the data protection principles set out in the General Data Protection Regulation (GDPR, 2016). Our legal bases for processing personal data (GDPR Art.6) are likely to be ‘public task’ or ‘consent’. This decision will be confirmed following discussions with the developers and EEF regarding the kind of personal data that will be available for processing as part of this project. Both the University of Warwick Legal Team and Ethics Committee will support with ensuring GDPR legislation compliance.

Personnel

Delivery team

Each partnership will have a different set-up of individuals involved. This will include the Regional Delivery Lead from the EEF and a Research School Director from the Research School, but it might also include Deputy Research Directors, Evidence Leads in Education (ELEs), individuals from the local authority and/ or the MAT, and other organisations supporting the partnership e.g. Teaching and Learning hubs or Maths hubs. Their roles will vary and might include being a member of the steering group, designing content, delivering content, supporting implementation.

Evaluation team

The evaluation will be delivered by a multi-institutional team with complementary expertise in theory-based evaluation, mixed methods, professional development, system leadership, and evidence mobilisation. While specific team members will provide intellectual leadership on particular evaluation areas, the work will be undertaken as a single, integrated programme of research. Data collection, analysis, and synthesis will be coordinated across areas, with shared protocols and data-sharing arrangements designed to minimise burden on participants and ensure coherence across strands.

Overall leadership and coordination will be provided by the Principal Investigator, with area leads acting as thematic anchors for theory development, analytic framing, and interpretation. Team members will work across evaluation areas and stages, contributing to data collection, cross-case analysis, and synthesis in line with their expertise and the evolving needs of the evaluation.

Dr Thomas Perry (Principal Investigator, University of Warwick) will provide overall leadership on evaluation design, theory development, analysis, and reporting, and will oversee integration across evaluation areas and institutions.

Dr Geoffrey Lewis (University of Warwick) will provide lead expertise on evidence-informed professional development and classroom practice (Area A), and will coordinate data collection and fieldwork across partnerships, working closely with colleagues across all evaluation areas.

Dr Rebecca Morris (University of Warwick) will provide specialist input across the evaluation on educational inequalities, place-based policy, and workforce issues, contributing to theory refinement, analysis, and interpretation across all three evaluation areas.

Professor Toby Greany (University of Nottingham) will provide lead expertise on partnership leadership, governance, and system-level collaboration (Area B), supporting theory development and analysis related to partnership design, coherence, and sustainability.

Dr Mike Collins (University of Nottingham) will support work across Area B and contribute to cross-cutting analysis on leadership, implementation, and partnership processes.

Professor Mike Coldwell (Manchester Metropolitan University) will provide lead expertise on evaluation methodology, professional learning, and evidence mobilisation (Area C), contributing to the development of the Evaluation Framework and cross-area synthesis.

Dr Helen Lawson (Manchester Metropolitan University) will support work across Area C and contribute to data collection, analysis, and synthesis relating to evidence use and mobilisation across partnerships.

Risks

Key risks will be actively monitored through a risk register, with mitigation strategies agreed in advance. We have identified key risks to delivery, along with proportionate mitigation strategies, ensuring the evaluation remains robust, feasible, and low-burden for schools.

Risk	Risk Rating	Prevention / Mitigation
Low engagement or attrition from partnerships/schools	Medium	Build buy-in through co-constructed tools and regular dialogue with EEF, Research Schools, and leads. Minimise burden with clear communication of benefits and careful scheduling. Use multiple methods to reduce reliance on any single dataset.
Incoherence across multiple data sources	Medium	Anchor evidence in a shared evaluation framework aligned to the ToC. Dedicate time for integration and cross-case synthesis. Apply regular internal QA processes.
Complexity of theory-based design	Medium	Keep tight alignment with the ToC; apply realist principles and process tracing to ensure causal depth. Peer review the study plan and iteratively refine with EEF.
Consortium coordination	Low–Medium	Use central coordination, regular cross-institution meetings, and shared protocols. Clear distribution of responsibilities across work strands. Build on prior experience with multi-partner projects (e.g. WELL, SSL).
Staff turnover	Low–Medium	Maintain strong documentation and shared systems. Ensure role overlap across institutions and handover protocols.
Data protection / GDPR	Low	Secure ethical approvals at all institutions. Use encrypted storage, formal data sharing agreements, and pseudonymisation.
Participant burden / response bias	Medium	Design concise instruments, emphasise confidentiality and independence. Triangulate self-reports with other evidence. Use reminders and flexible response modes.

Timeline pressures	Medium	Align fieldwork with school terms and CPD cycles. Maintain slack in the Gantt chart and regular progress reviews with EEF.
Changes in partnership delivery	Medium	Use flexible case study design to capture adaptations. Sample additional schools if needed and document fidelity vs adaptation explicitly.

Timeline

Stage	Timing	Key Activities	Outputs
Project initiation	Nov – Dec 2025	Inception meetings; engagement with EEF and partnerships; initial planning and scoping	Agreed project scope and initial engagement
Stage 1: Explore and refine	Jan – Apr 2026	Early fieldwork; partnership engagement; observations and document review; theory and evidence review; development of initial Programme Theory	Initial Programme Theory (Appendix C); partnership overviews; priority mechanisms identified
Stage 2: Co-construction and Evaluation Framework development	Apr – Aug 2026	Structured evaluation planning meetings with partnerships and EEF; co-construction of Evaluation Framework; development of research instruments; establishment of evaluation database	Evaluation Framework; research instruments; structured evaluation database
Stage 3: Main data collection and analysis	Sept 2026 – May 2027	Primary data collection (surveys, interviews, observations, areas of interest); ongoing collection and analysis of partnership M&E data and documentation	Multi-level dataset; initial analysis; evidence on mechanisms and contextual variation
Stage 4: Analysis, synthesis, and reporting	May 2027 – April 2028	Cross-case analysis; synthesis of findings; case studies and areas of interest; theory testing and refinement; report writing and dissemination	Refined Programme Theory; final report; interim and supplementary outputs

Note: Timing reflects alignment with the school year, with primary data collection concentrated in the Autumn and Spring terms.

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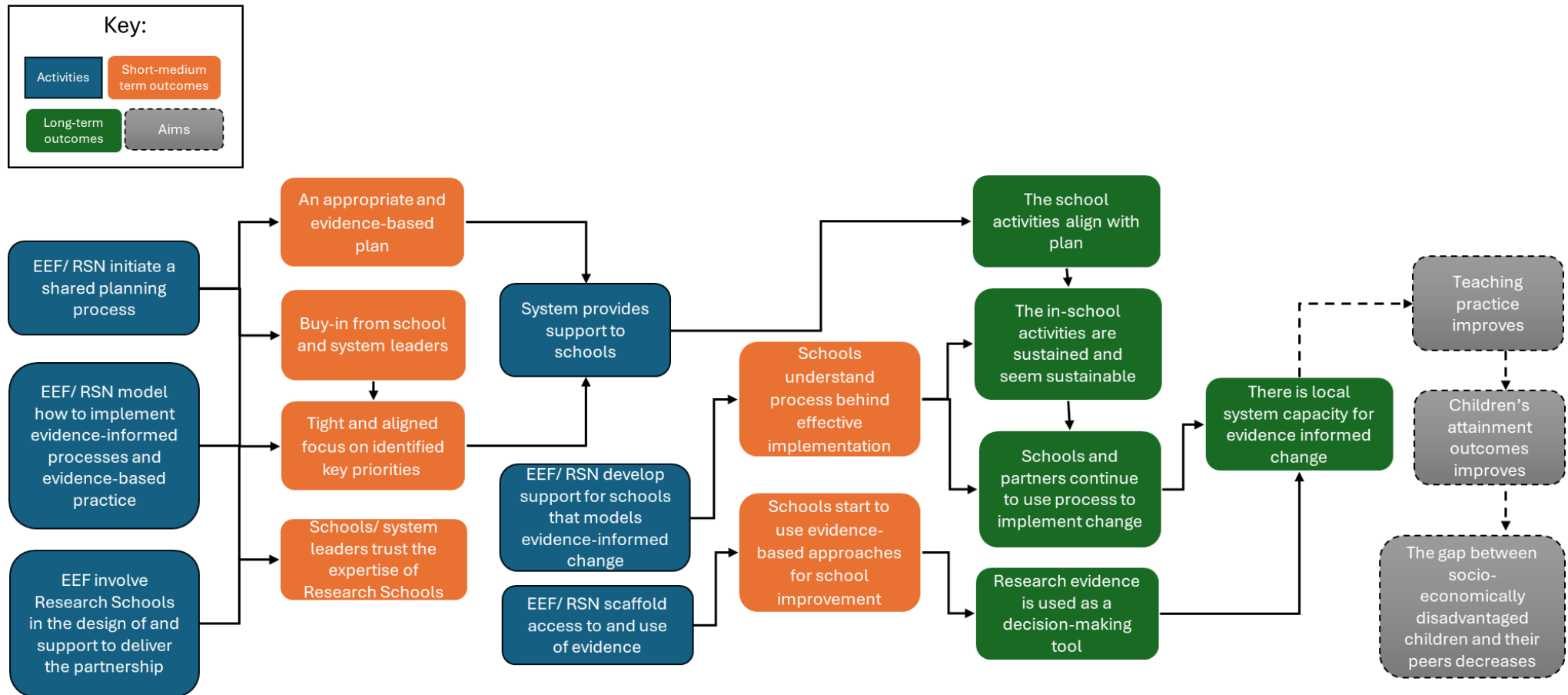
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Appendix A: Six Partnership Foundations underpinning the Regional Partnership programme, from Working in Partnership: A guide to regional partnerships with the EEF (p.6)



Appendix B – EEF Theory of Change diagram



Appendix C – Initial Programme Theory: Mechanism Group (CMOC) Statements and Theory of Change

Introduction

This document sets out the working programme theory for the Regional Partnerships evaluation. It is based on a theory-based evaluation approach, in which the intervention is understood and assessed through an explicit articulation of how it is expected to work, for whom, and in what contexts.

The programme theory has been developed specifically in relation to the EEF Regional Partnerships (RP) programme. These partnerships were selected by the EEF following an initial evidence exploration and development phase (2024–2025) and are focused on supporting evidence-informed improvement through collaborative partnership activity across schools and system actors. The evaluation therefore examines how processes relating to professional development, evidence mobilisation, partnership working, and system improvement operate within the specific context of the RP model.

At the same time, the programme theory draws on, and seeks to contribute to, broader bodies of theory and evidence relating to collaborative school improvement, professional learning, evidence-informed practice, and educational change. The intention is therefore to also generate wider explanatory insight into the conditions, mechanisms, and processes through which similar forms of partnership-based improvement may support change across different settings.

To develop this programme theory, we conducted a theory and evidence review (a rapid, narrative literature review) across three broad areas:

- A. Professional development, learning and classroom practice,
- B. Partnership leadership and system organisation, and
- C. The use of research evidence.

These areas draw on distinct but overlapping bodies of literature, and the nature, strength, and specificity of the evidence varies across them. In some, there are well-developed and empirically tested models; in others, the evidence base is more fragmented or emergent. The aim of the review was to synthesise the best available theory and evidence into a coherent and usable framework for evaluation. It is presented as a tentative working theory or hypothesis to guide the evaluation and will be developed, tested and then refined as the evaluation unfolds.

From the theory and evidence review, we have developed a set of nine theory components (A1-2, B1-4, and C1-3) each expressed as a structured statement that links i) contextual conditions, ii) mechanism groups, and iii) outcomes (denoted in brackets after each statement with ‘cc’, ‘mg’, or ‘o’). These statements summarise our *a priori* understanding of how the Regional Partnerships intervention is expected to operate. They are deliberately specified at a level that is both theoretically meaningful and empirically tractable, capturing groups of mechanisms rather than highly granular practice. We see each statement as a high-level description of a complex system, and the interaction within and between each component as a dynamic, unfolding process. In particular, we have opted to describe mechanism groups, rather than mechanisms, and provide examples of practices which form them. These mechanism groups describe a purpose or function (e.g. building relational trust and legitimacy) that can be achieved through multiple underlying practices and mechanisms.

Given the scope and scale of this evaluation, it would not be feasible to specify all underlying mechanisms in detail at this stage and within this document. There are several mechanism groups within each of the nine components, and each group may comprise many distinct underlying mechanisms. Across all areas, this would result in a very large and unwieldy set of causal processes were we to specify at the level of mechanisms. While such granularity may be desirable in principle, it would reduce the usability and clarity of the programme theory for guiding data collection, and theory development and testing. Mechanism groups are intended to capture the core causal processes while retaining flexibility. As the evaluation progresses, we will use empirical data to explore these groups in more depth – refining, disaggregating, and testing the underlying mechanisms where appropriate.

In summary, the nine theory and mechanism group statements set out in this document serve two purposes within the evaluation: First, they underpin a framework for data collection and analysis, guiding the design of instruments and the interpretation of findings by specifying what processes we expect to observe within partnerships. Second, they function as testable elements of the programme theory, which will be examined and refined through empirical data. The evaluation will assess the extent to which the hypothesised relationships between contexts, mechanisms, and outcomes are supported and how these vary across different partnership settings.

Overview of Programme Theory Areas and Components

AREA A – PROFESSIONAL DEVELOPMENT AND LEARNING

- A1. Professional Development and Implementation Support
- A2. Enactment, Embedding, and Responsiveness to Pupils

AREA B – LEADING AND SUSTAINING PARTNERSHIPS AND ECOSYSTEMS

- B1. Shared Direction, Purpose, and Commitment
- B2. Knowledge Mobilisation, Capacity, and Brokerage
- B3. Governance, Structures, and System Design
- B4. Adaptive Planning, Learning, and System Evolution

AREA C – MOBILISATION AND IMPLEMENTATION OF EVIDENCE

- C1. Evidence Identification, Appraisal, and Selection
- C2. Evidence Translation, Mobilisation, and Engagement
- C3. Evidence Use, Professional Judgement, and Adaptation in Practice

Area A – Professional Development and Learning

This area comprises two interconnected theory components describing different aspects of how teaching and learning improve. The first focuses on professional development, referring to the formal, structured activities delivered through the partnership. The second concerns professional learning and practice change, where teachers engage with and embed new approaches within their schools and classrooms over time, including how they apply and adapt these approaches to fit their subjects and meet the needs of their pupils, and disadvantaged pupils in particular. These components are overlapping and mutually reinforcing: professional development informs and motivates teacher learning; teacher learning shapes practice; and pupil impact is realised through responsive teaching and learning in the classroom that is more aligned with the intended evidence-based practices.

A1. Professional Development and implementation support

HOW DO REGIONAL PARTNERSHIPS DESIGN AND SUPPORT PROFESSIONAL DEVELOPMENT AND IMPLEMENTATION PROCESSES INTENDED TO CHANGE PRACTICE?

In school and partnership contexts where professional development (PD) is appropriate and perceived to be relevant in relation to pupil needs (cc1); school priorities (cc2); and teachers' existing knowledge, beliefs and dispositions (cc3); and where sufficient time and leadership support are available to engage meaningfully (cc4), PD is more likely to improve teaching and pupil outcomes.

This occurs where professional development (PD) programmes are designed to sustain four inter-connected mechanism groups⁸: **Building knowledge (mg1)** involves the development and restructuring of professional knowledge and mental models. **Motivating goal-directed teacher behaviour (mg2)** involves strengthening commitment to change, establishing clear goals for practice, and supporting engagement with evidence-informed approaches. **Developing teaching techniques (mg3)** involves the acquisition and refinement of instructional strategies through modelling, rehearsal, feedback, and supported practice. Finally, **implementing and initiating practice change (mg4)** involves creating opportunities and structures for teachers to begin applying intended approaches within authentic professional contexts. These mechanism groups are supported through practices and mechanisms such as managing cognitive load and revisiting prior learning; setting specific goals linked to pupil outcomes; drawing on credible, high-quality sources and examples; and modelling and rehearsing instructional techniques; action planning; and structured opportunities to begin enacting new approaches in practice⁹.

When these mechanism groups are activated in combination, proximal outcomes include improved teacher understanding of the intended pedagogical principles and approaches (o1); increased engagement and commitment to professional development and learning activity (o2); and increased instructional capability, and readiness to implement intended practices (o3). These contribute to changes in classroom practice (o4) and, ultimately, to improvements in pupil experience, engagement, learning, and/or attainment (o5).

A2. Enactment, embedding, and responsiveness to pupils

HOW ARE EVIDENCE-INFORMED PRACTICES INTERPRETED, EMBEDDED, ADAPTED, AND SUSTAINED WITHIN SCHOOLS AND CLASSROOMS, INCLUDING IN RESPONSE TO THE NEEDS OF DISADVANTAGED PUPILS?

In school contexts where teachers have opportunities to enact, refine, and sustain new practices over time (cc1), where there is alignment with school priorities and improvement processes (cc2), where leadership and organisational conditions support implementation (cc3), and where teachers have access to information about pupil learning and understanding (cc4), professional development is more likely to translate into sustained changes in classroom practice and pupil learning.

This occurs through six inter-connected mechanism groups: **Enactment, contextualisation, and deliberate practice (mg5)** involve applying intended approaches to curriculum content and classroom

⁸ As identified in Sims et al. (2021)

⁹ See Sims, S., Fletcher-Wood, H., O'Mara-Eves, A., Cottingham, S., Stansfield, C., Van Herwegen, J., & Anders, J. (2021). What Are the Characteristics of Effective Teacher Professional Development? A Systematic Review and Meta-Analysis. Education Endowment Foundation.

practice, with repeated, feedback-informed enactment strengthening skill and fluency. **Social and organisational support (mg6)** involve collegial dialogue, coaching, feedback, shared expectations that increase consistency, alignment, and commitment. **Habit formation and routine embedding (mg7)** involve the repeated use of approaches in stable contexts, enabling new practices to become embedded in everyday classroom and school routines. **Diagnostic assessment and understanding pupil needs (mg8)** involve eliciting and interpreting evidence of pupil understanding, misconceptions, prior knowledge, and learning needs. **Responsive adaptation of instruction (mg9)** involves adjusting teaching in response to formative assessment, classroom interaction, and evidence of pupil learning. **Equity-focused attention and targeting (mg10)** extends mg9 to include deliberate attention to gaps, barriers, and differential pupil needs for disadvantaged pupils. These mechanism groups are supported through mechanisms and practices such as iterative cycles of implementation, reflection, and refinement in authentic classroom contexts over time; peer collaboration and professional learning communities; instructional coaching, mentoring, and feedback; questioning, formative assessment, and analysis of pupil work; adapting instruction across lessons and sequences; and targeted scaffolding and support for pupils.

When these processes are in place, they lead to proximal outcomes including increased confidence, fluency, and professional commitment (o1); sustained improvement in classroom routines, pedagogy, and/or curriculum, and responsiveness to pupil learning (o2); more equitable access to high-quality instruction and reduced within-class learning gaps (o3); and, over time, improved pupil engagement, experience, learning, attainment and reduced disadvantage-attainment gaps (o4).

Area B – Leading and Sustaining Partnerships and Ecosystems

This area comprises four theory components relating to how partnerships are established, organised, and sustained. The first is a foundational component, focused on creating shared direction, purpose, and commitment, much of which occurs at the early stages of partnership formation. The second concerns knowledge mobilisation and capacity building, ensuring that expertise is effectively connected, shared, and developed across the partnership. The third focuses on governance, structures, and coordination, which organise and support the implementation of partnership activity. The fourth addresses adaptive planning and system learning, recognising partnerships as evolving systems that require ongoing monitoring, reflection, and adjustment over time. Together, these components describe how partnerships create the conditions for coordinated, sustained improvement. Note that the partnerships all work within the framework established by EEF, including a requirement that partnership activity is focused on embedding rigorous evidence-informed approaches. The four components are therefore all variously shaped by the context of structures, support and constraints in place, and the overall aims of the EEF and RP programme.

B1. Shared Direction, Purpose, and Commitment (Engage and Unite)

HOW DO REGIONAL PARTNERSHIPS ESTABLISH AND SUSTAIN SHARED DIRECTION, TRUST, COMMITMENT, AND COLLECTIVE OWNERSHIP AROUND EVIDENCE-INFORMED IMPROVEMENT AND CLOSING DISADVANTAGE GAPS?

In partnership contexts where there is sufficient alignment between participating organisations' priorities (cc1), where there are clear drivers for collaboration, whether mandated, incentivised, or voluntary (cc2), and where historical relationships and power dynamics do not preclude cooperation (cc3), and where there is recognition of local educational inequalities and the need to improve

outcomes for disadvantaged pupils (cc4), partnerships are more likely to establish a shared direction and sustained commitment.

This occurs through three inter-connected mechanism groups: **Shared problem definition and goals (mg1)** involve aligning organisational and individual priorities around a common understanding of local challenges, educational disadvantage, and intended outcomes, reducing fragmentation and competing agendas. **Strengthening inter-organisational trust (mg2)** involve the development of trust through interaction and transparency, lowering perceived risk and enabling more open exchange. **Collective commitment and ownership (mg3)** involve the development of shared identity and responsibility for partnership activity, strengthening commitment to joint work. These mechanisms are supported through practices such as developing a shared understanding of local challenges, priorities and disadvantage gaps; creating forums for dialogue and joint decision-making; establishing clear but negotiated goals linked to improvement and equity; and building trust through repeated interaction, transparency, and the demonstration of mutual benefit.

When these processes are in place, they lead to shared understanding, trust, legitimacy, and collective commitment to improvement goals (o1), coordinated action, reduced duplication, sustained engagement, and greater coherence around approaches to supporting disadvantaged pupils (o2), and, over time, more coherent and stable partnerships capable of collective improvement and more equitable educational outcomes (o3).

B2. Knowledge Mobilisation, Capacity, and Brokerage

HOW DO PARTNERSHIPS MOBILISE EXPERTISE, BROKER KNOWLEDGE, AND BUILD CAPACITY ACROSS SCHOOLS, ORGANISATIONS, AND SYSTEM ACTORS?

In partnerships where there is access to relevant expertise (cc1), variation in knowledge and capacity across organisations (cc2), and opportunities for interaction across institutional boundaries (cc3), collaboration can enable the generation, sharing, and application of knowledge for improvement.

This occurs through three inter-connected mechanism groups: **Knowledge generation and co-construction (mg4)** involve combining diverse perspectives and expertise to generate new insights and shared understanding. **Brokerage and boundary spanning (mg5)** involve connecting actors and translating ideas across organisational and professional boundaries, making knowledge accessible and transferable. **Capacity building and capability development (mg6)** involve strengthening the skills, confidence, and resources of individuals and organisations to engage in improvement activity. These mechanisms are supported through practices such as joint inquiry and problem-solving; the use of intermediaries or boundary spanners to connect actors and translate ideas; the development of professional networks and communities; and deliberate strategies to share expertise and build capability across organisations.

When these processes are in place, they lead to increased access to expertise and improved understanding of how to meet improvement and equity goals across the partnership (o1), the diffusion of practices, strengthened professional capacity, and more consistent approaches across organisations (o2), and, over time, enhanced collective capability and more effective implementation of improvement strategies (o3).

B3. Governance, Structures, and System Design

HOW DO GOVERNANCE ARRANGEMENTS, ORGANISATIONAL STRUCTURES, AND COORDINATION PROCESSES SUPPORT EFFECTIVE AND SUSTAINABLE PARTNERSHIP ACTIVITY?

In contexts where partnerships are supported by appropriate governance arrangements (cc1), clear organisational roles (cc2), and sufficient resources and infrastructure (cc3), collaborative activity is more likely to be coordinated, sustained, and effective.

This occurs through three inter-connected mechanism groups: **Governance and decision-making structures (mg7)** involve establishing formal arrangements that support coordination, accountability, and strategic direction. **Role clarity and coordination mechanisms (mg8)** involve defining responsibilities and routines that reduce ambiguity and enable effective collaboration. **Resource alignment and infrastructure (mg9)** involve mobilising and aligning time, funding, and organisational capacity to support sustained activity. These mechanisms are supported through practices such as establishing formal governance arrangements (e.g. lead organisations, shared governance, or dedicated coordinating bodies); defining roles and responsibilities across partners; creating routines for decision-making and accountability; and aligning resources, time, and infrastructure to support joint work.

When these processes are in place, they lead to clarity of roles, improved coordination, and increased organisational stability (o1), more efficient implementation of partnership activities and reduced duplication or conflict (o2), and, over time, stable and scalable partnership models (o3).

B4. Adaptive Planning, Learning, and System Evolution (Reflect)

HOW DO PARTNERSHIPS MONITOR, LEARN, ADAPT, AND EVOLVE OVER TIME IN RESPONSE TO EVIDENCE, EXPERIENCE, AND CHANGING CONDITIONS?

In partnership contexts characterised by uncertainty, complexity, and evolving goals (cc1), and where there is capacity to monitor, evaluate, and reflect on progress (cc2) and to respond to emerging information and changing conditions (cc3), partnerships are more likely to learn, adapt, and improve over time.

This occurs through three inter-connected mechanism groups: **Strategic planning and coordination (mg10)** involve developing shared plans and aligning activity around a clear theory of action. **Monitoring, feedback, and evaluation (mg11)** involve generating and analysing information about progress to inform decision-making. **Adaptation, iteration, and sustainability (mg12)** involve adjusting strategies, structures, and goals over time in response to evidence and experience. These mechanisms are supported through practices such as developing shared plans and theories of action; establishing systems for collecting and analysing data on progress and outcomes; engaging in regular reflection and review; and adapting strategies in response to emerging evidence and changing conditions.

When these processes are in place, they lead to improved understanding of what is working and why (o1), more responsive and effective strategies and the refinement of partnership approaches (o2), and, over time, sustainable collaboration, system learning, and deeper changes to organisational routines, partnership structures, and ways of working (o3).

Area C – Mobilisation and Implementation of Evidence

This area focuses on how the partnerships operate as evidence-informed systems, requiring processes of evidence literacy development, mobilisation, translation, and use. These processes involve the exchange, development, and application of knowledge to guide practice. The first component concerns evidence identification and appraisal, focusing on what evidence is drawn on and how it is understood and interpreted. The second addresses evidence translation and mobilisation, involving the preparation of evidence into usable forms, often during the design of programmes and resources. The third focuses on situated evidence use and professional judgement, where practitioners interpret and apply evidence in context, ensuring that changes in practice remain aligned with underlying principles. Together, these components describe how evidence is selected, made usable, and enacted in practice.

C1. Evidence Identification, Appraisal, and Selection

HOW IS EVIDENCE IDENTIFIED, APPRAISED, SELECTED, AND ALIGNED WITH LOCAL PRIORITIES, CONTEXTS, AND PROBLEMS?

In contexts where school leaders and teachers have access to multiple sources of evidence, including research syntheses, practitioner knowledge, and local (e.g., classroom) data (cc1), and where there is capacity and support to engage with these sources (cc2) and to apply them to local priorities and contexts (cc3), successfully implementing ideas from research depends on how the evidence is identified, appraised, and selected.

This occurs through three inter-connected mechanism groups: **Evidence identification and access (mg1)** involve locating and drawing on relevant sources of research, professional knowledge, and local data. **Appraisal of quality and relevance (mg2)** involves assessing the credibility, robustness, and applicability of different forms of evidence. **Alignment with local needs, values, and problems (mg3)** involves interpreting evidence in relation to specific contexts, priorities, and pupil needs. These mechanisms are supported through practices such as drawing on curated sources (e.g. guidance reports, reviews, and summaries); consulting a range of evidence types, including research, professional, and local evaluation evidence; and making informed judgements about the credibility, applicability, and usefulness of that evidence for particular contexts and purposes.

When these processes are in place, they lead to the selection of evidence that is perceived as credible and relevant (o1), greater coherence between chosen approaches and local needs (o2), and, over time, more appropriate and potentially effective implementation of evidence-informed practices (o3).

C2. Evidence Translation, Mobilisation, and Engagement

HOW IS EVIDENCE TRANSLATED, COMMUNICATED, MOBILISED, AND MADE USABLE FOR PRACTITIONERS AND PARTNERSHIPS?

In contexts where there is capacity to translate and communicate research evidence (cc1), and where intermediaries, tools, or processes connect research to practice (cc2) and support engagement with practitioners (cc3), evidence is more likely to be engaged with when it is made accessible, usable, and relevant.

This occurs through three inter-connected mechanism groups: **Translation into usable forms (mg4)** involves synthesising, adapting, and representing research and evidence informed approaches in ways that are accessible and actionable for practitioners. **Active communication and engagement (mg5)** involve promoting and mobilising evidence through professional development, networks, relationships, and collaborative activity, increasing awareness and motivation to engage. **Trust-building and receptivity (mg6)** involve establishing credibility and alignment with practitioner needs, strengthening confidence in the evidence and its sources. These mechanisms are supported through practices such as synthesising and adapting research into guidance, tools, resources, curriculum materials, professional development activities, and practical exemplifications of evidence-informed practice; framing key principles and recommendations in accessible and actionable ways; actively communicating and promoting evidence through professional learning, networks, coaching, and collaborative dialogue; and building trust through sustained engagement and alignment with practitioner needs.

When these processes are in place, they lead to increased awareness of and engagement with research evidence (o1), greater availability of usable and contextually meaningful representations of evidence-informed practice, alongside increased readiness and capacity to act on them (o2), and, over time, the incorporation of evidence into planning, professional development, teaching, and decision-making processes, supporting improvements in classroom practice and pupil learning (o3).

C3. Evidence Use, Professional Judgement, and Adaptation in Practice

HOW DO PRACTITIONERS INTERPRET, APPLY, ADAPT, AND REFINE EVIDENCE-INFORMED APPROACHES THROUGH PROFESSIONAL JUDGEMENT AND CLASSROOM PRACTICE?

In classroom, departmental and school contexts where practitioners have access to usable evidence (cc1), and where there is capacity, time, and support to engage with it in practice (cc2), to interpret it in relation to subject and pupil context (cc3), and to apply, align and refine it over time (cc4), the impact of evidence depends on how it is interpreted, applied, and adapted through professional judgement.

This occurs through three inter-connected mechanism groups: **Evidence literacy and sensemaking (mg7)** involve interpreting evidence in relation to existing knowledge, subject content, classroom practice and organisation priorities. **Structured interaction and application (mg8)** involve engaging with evidence through collaborative and practice-focused activities that support its use across different levels of the school system. **Iterative use, reflection, and embedding (mg9)** involve testing, adapting, and refining approaches over time through cycles of implementation and feedback. These mechanisms are supported through practices such as critically interpreting evidence in relation to subject, curriculum, pupil, and school context; engaging in structured activities such as coaching, mentoring, departmental or school planning, or joint practice development; and testing, adapting, and refining approaches through cycles of implementation, reflection, and evaluation.

When these processes are in place, they lead to deeper engagement with evidence and increased confidence in its use (o1), contextually adapted practices and more informed instructional decision-making (o2), and, over time, improved teaching and pupil learning (o3).

Note that there is a strong connection between theory components C3 and A2. These are closely linked and complementary theory components, which collectively require teachers to align their practice to evidence and evidence-based practices (C3) and the needs, possibilities and constraints of their

school, practice, curriculum and pupils. Area A2 focuses more directly on the enactment, embedding, and responsiveness of classroom practice; C3 focuses specifically on the processes through which practitioners interpret and apply evidence in context through professional judgement as part of that, and whether these processes result in ‘intelligent’ and effective adaptation of evidence and/or evidence-informed practices while remaining aligned (i.e., having fidelity) to the underlying evidence.

The Regional Partnerships Theory and Mechanism Groups as a Complex System

The Regional Partnerships intervention can be understood as an integrated System of Systems for improving teaching and pupil outcomes through the coordinated interaction of three domains: professional learning and practice change (Area A), partnership leadership and infrastructure (Area B), and evidence-informed reasoning and practice (Area C). Each domain represents a distinct but interdependent set of processes, and the effectiveness of the intervention depends on how these processes operate together rather than in isolation, at both a micro and macro level.

At its core, the intervention is oriented towards improving classroom practice and pupil learning (Area A). This involves a staged but overlapping process in which teachers engage with high-quality professional development on evidence-based approaches, develop and refine their practice over time, and enact teaching that is increasingly responsive to pupil needs. However, these processes are not self-sustaining at the level of individual teachers. They depend on a wider system that enables, coordinates, and sustains them. This wider system is provided by partnership-level leadership, organisation, and collaboration (Area B). Partnerships create the conditions under which professional learning can occur at scale by establishing shared direction, purpose, and commitment; mobilising expertise and capacity across organisations; developing governance structures and infrastructure; and enabling ongoing planning, monitoring, and adaptation. Without this layer, professional development risks becoming fragmented, inconsistent, or short-lived. With it, professional learning becomes coordinated, cumulative, and capable of operating across schools and contexts. Running through and shaping both of these domains is the use of research evidence (Area C), which provides the epistemic foundation for the intervention. Evidence use is a set of processes involving the identification and appraisal of relevant knowledge, the translation and mobilisation of that knowledge into usable forms, and its interpretation and application through professional judgement in practice. These processes ensure that changes in teaching are not arbitrary or purely experiential, but are informed by robust, cumulative knowledge about effective practice. Equally, evidence use is inherently interpretive and context-sensitive: it depends on the capacity of practitioners and organisations to make judgements about what evidence means and how it should be applied in specific settings.

Taken together, these three domains form a mutually reinforcing system. Area B enables Area A by providing the organisational and relational conditions for professional learning; Area C informs Area A by shaping the content and direction of that learning; and Area B enables Area C by mobilising expertise, brokering knowledge, and creating the conditions for evidence to be accessed and used. In turn, Area A provides the primary site of impact, where changes in teaching practice translate into improved pupil outcomes, and generates feedback that informs both partnership activity and evidence use. The system is therefore dynamic and recursive: processes of learning, collaboration, and evidence use interact over time, rather than operating in a simple linear sequence.

A key implication of this model is that the effectiveness of the intervention depends on the alignment and functioning of all three domains. Weakness in any one area can undermine the others. For example, high-quality professional development (Area A) is unlikely to lead to sustained change without

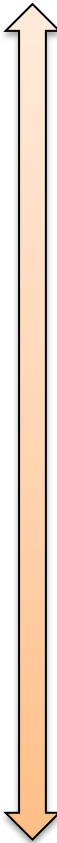
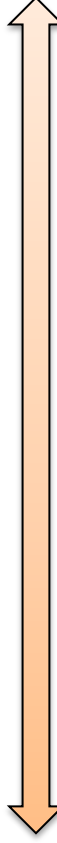
organisational support and coordination (Area B), while strong partnership structures (Area B) may have limited impact if they are not oriented towards improving teaching and learning (Area A). Similarly, without effective engagement with evidence (Area C), professional learning may be misdirected or based on partial or inappropriate knowledge, limiting its impact. Conversely, where all three domains are functioning and aligned, they create the conditions for cumulative, system-wide improvement in teaching and learning.

This synthesis therefore presents the Regional Partnerships intervention not as a set of discrete components, but as an integrated System of Systems for improvement, in which professional learning, organisational capacity, and evidence-informed practice are brought together in a coherent and mutually reinforcing way.

Preliminary Theory of Change

Alongside this mechanism-focused account, we have also developed a preliminary Theory of Change, which offers a complementary perspective on the intervention. Whereas the theory components and mechanism groups describe the core causal processes that are expected to operate across the system, the Theory of Change provides a more explicitly process-oriented model of how partnerships develop over time. It sets out the broad stages through which partnerships move, from initial exploration and planning, through implementation and activity, to embedding, refinement, and impact, alongside the evolving conditions and enablers that support this progression. While there is overlap between the two, they operate at different levels: the Theory of Change describes when and where change is expected to occur, while the mechanism statements describe how and why it occurs. Taken together, they provide a more complete account of the intervention, combining a temporal model of development with a detailed specification of the mechanisms through which improvement is expected to be achieved.

Preliminary Theory of Change for Regional Partnerships Evaluation

Expertise and Professional Capital		Theory of Change Spine		Enablers and Conditions
(All Stages/Evolving)		(Organised into three overlapping stages with evolving foci)		(All Stages/Evolving)
<i>Individuals, relations, policies and infrastructure that make available/harness:</i> E1. Evidence Literacy · Understanding research, context, professional judgement · Critical appraisal, avoiding “lethal mutations” E2. Effective Professional Development · Evidence-based PD design · Behaviour change mechanisms · Sustained support and reinforcement E3. Implementation Know-How · Explore-Prepare-Deliver-Sustain logic · Core components vs adaptable elements · Feedback and iterative refinement E4. System and Partnership Leadership · Co-production and brokerage · Distributed leadership structures · Governance and coherence across levels E5. Understanding of Disadvantage · Diagnostic capability · Tiered and targeted intervention logic · Equity-focused decision making		FOUNDATIONS FOCI - Evidence Exploration and Diagnostic Planning - Analysis of pupil needs, context, capacity - Engagement with research evidence - Mapping existing activity and infrastructure - Shared Priority + Evidence-Informed Plan - Shared problem definition - Feasible, sequenced implementation plan - Clear articulation of intended mechanisms and outcomes - Partnership Infrastructure and Role System Established - Defined roles (Research Schools, system leaders, implementation leads) - Governance and decision routines - Alignment with MAT / LA / school priorities ACTION FOCI - Professional Development and Implementation Support - High-quality, evidence-informed PD - Modelling, rehearsal, feedback, coaching - Structured implementation guidance - School-Level Implementation and Classroom Change - Adoption and adaptation of core components - Embedding in routines, curriculum, pedagogy - Distributed leadership within schools EMBEDDING, REFINING & IMPACT FOCI - Sustainment and System Capacity - Monitoring and adaptation loops - Strengthened implementation routines - Enduring cross-school collaboration - Pupil Outcomes and Equity - Improved attainment and engagement - Reduced inequities and disadvantage gaps - Emerging short-, medium-, and longer-term impacts		· C1. Legitimacy and trust in intermediaries (Research Schools, EEF leads, system actors) · C2. Alignment with teacher, school and system priorities and reduction of competing demands · C3. Resourcing, capacity, time, and infrastructure · C4. Implementation and improvement climate and culture (engage - unite - reflect behaviours) · C5. Monitoring, feedback, and adaptive learning loops
Cx. Contextual conditions - The starting points and nature of each partnership, and how it evolves will vary by, for example, place and geography (e.g., rural/urban/coastal), subject area/phase, workforce conditions, local and community (dis)advantage, sectoral differences (e.g., academisation).				