

Review and ongoing evaluation

The review of Education & Public Engagement during site reviews mirrors the approach taken in the evaluation of the research and impact goals of an SFI application or award. SFI only uses international peer review in the evaluation process. For awards of scale, which include an EPE component, reviewers with expertise in EPE that is closely aligned to the focus of the research programme are recruited as both postal and/or panel reviewers, depending on the stage of review.

Applicants and awardees will be expected to:

- ▶ Outline the vision for EPE including objectives, target audiences, outputs, outcomes and impacts with clear links to the research programme
- ▶ Consider and justify what they are proposing to do
- ▶ Consider why the proposed approaches are most appropriate for their area and programme of research
- ▶ Describe why these approaches will be most impactful to reach the goals
- ▶ Describe the expertise needed in the team to deliver and implement on the proposed strategy, outlining the expertise of existing team members and partners
- ▶ Describe how a culture of EPE will be fostered and how researchers will be enabled to participate
- ▶ Describe how EPE will be monitored and evaluated, including success indicators
- ▶ Include details on the host research body support for the EPE programme
- ▶ Outline and justify resourcing and budget requirements for the EPE programme.

It should be noted that guidance and process may vary depending on the specific programme, the stage of the award, the expectations and review criteria. Sample review criteria and sample guidance for reviewers are given in Appendix 1.

Planning and Reporting on EPE

The specific requirements of EPE activity in large-scale awards is communicated with awardees at the start of an award / reporting period. In brief, a detailed **EPE strategy** should be developed which outlines the vision and objectives for the EPE programme and typically sets out three “flagship” initiatives which demonstrate the key strengths of the EPE programme. These flagship activities should form the basis of an annual **operations plan**. The use of detailed logic models⁵ is strongly encouraged to ensure that EPE activities planned have a clear link to the EPE strategy. Reporting on implementation of the operations plan will comprise a section of the **annual report** to SFI⁶. These three documents are key elements in the review process for the EPE Programme.

SFI measures the level of participation of team members through its EPE key performance indicator⁷ (KPI - see Appendix 2). This is purely a quantitative measure and does not seek to measure quality in any way. Qualitative aspects are assessed through annual/progress reports and site reviews. Details of EPE KPI requirements are set out by SFI on a case-by-case basis.

5 A logic model is a graphical representation of planned work, it includes the resources (inputs) and activities that will take place, in addition to the outputs and outcomes that are expected. See Glossary of terms for a suggested outline.

6 Templates are available from SFI for each of these three documents.

7 This currently applies to awards of greater than €2.5 million in SFI funding.