

REF 2029 Town Hall

Engagement and Impact Guidance

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What is the Research Excellence Framework?

REF is owned and led by the four UK higher education funding bodies



- It:
 - informs allocation of around £2bn of block-grant funding each year
 - provides accountability for public investment in research
 - continually evolves, alongside our research base
 - (given the connection to allocation of funds) inevitably drives behaviour and therefore is a significant policy instrument across the UK

Principles and functions for REF 2029:

1. REF should fulfil the following purposes:

- **Inform the allocation** of block-grant research funding to HEIs based on research quality
- Provide **accountability for public investment** in research and produce evidence of the benefits of this investment
- Provide **insight into the health of research** in HEIs in the UK.

2. REF should underpin:

- A research system that produces **high-quality, rigorous** research that is **open** to all;
- An **inclusive and collaborative** research system that supports a diversity of people, ideas, institutions, methodologies, outputs, and activities; and
- An **engaged and impactful** research system that connects research with wider society to bring about positive socio-economic change.

3. REF decision making should be driven by:

- **Robustness** of assessment outcomes
- Impact of the system on **research culture**
- Ensuring that the **bureaucratic burden** of the system is proportionate.

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The engagement and impact profile:

- Captures the wider societal benefits created through research
- Provides accountability for public funds

Key changes in REF 2029



ICS authors are encouraged to discuss engagement strategies and responsible practices



The 2* quality threshold for underpinning research has been removed.



The minimum number of required ICS is reduced to one (but 2 can be submitted)



Contributors to engagement and impact can be celebrated through publication of names in the ICS database

REF 2029

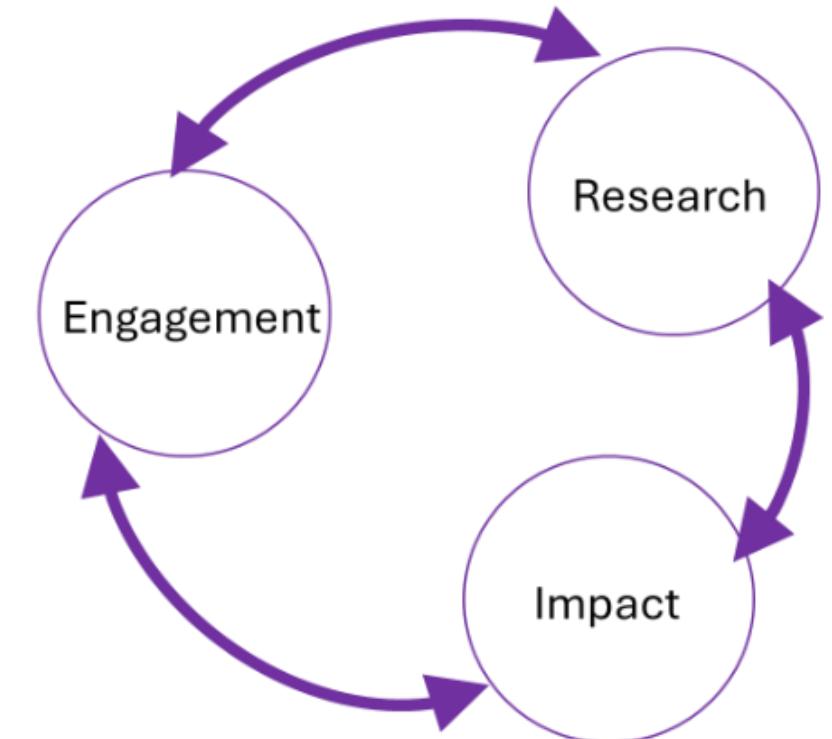
Research Excellence Framework

Definition of Impact

Impact is defined as an effect on, change or benefit to the economy, society, culture, public policy or services, health, the environment or quality of life, beyond academia.

Definition of Engagement

For the purposes of the REF, engagement is defined as an interaction between the HEI and relevant individuals, groups, communities, organisations, the public, commercial partners, or policy makers, that is purposeful, responsible, and context appropriate.



Definition of underpinning research

For underpinning research, ‘underpinned by’ means that the research made a distinct and material contribution to the impact taking place, such that the impact would not have occurred or would have been significantly reduced without the contribution of that research.

Assessment of Engagement and Impact

- Worth 25% of the unit quality profile
- Assessed through Impact Case Studies (ICS)
- Criteria of Reach and Significance

Number of ICS per FTE

Volume measure (FTE)	Number of ICS
Up to 9.99 (option 1)	1
Up to 9.99 (option 2)	2
10 to 19.99	2
20 to 39.99	3
40 to 59.99	4
60 to 89.99	5
90 to 119.99	6
120 to 169.99	7
170 or more	8, plus one more further ICS per additional 50 FTE

Eligibility period for ICS

- **Impact:**
 - 1 August 2020 to 31 July 2028
 - Unless between 1 August 2020 and Dec 2020 and already submitted (due to the COVID extension)
- **Underpinning research:**
 - 1 January 2008 to 31 December 2028

Continued ICS

- Continued ICS recognise ongoing impact
- ICS are continued if **both**:
 - the body of underpinning research is the same as described in a REF 2014 and/or REF 2021 ICS **and**
 - the new impact described for this REF period significantly overlaps with the impact described in the 2014/2021 ICS
- ICS are not continued if
 - additional underpinning research has taken place since that described in the previous ICS
 - the impact types or beneficiaries have changed or are new

Eligibility of underpinning research outputs

- ‘Research produced by the submitting unit’ means that staff carried out the underpinning research
 - within the scope of the relevant UoA descriptor
 - while working in the submitting HEI
- The staff:
 - Need not be employed on a volume contributing contract or on a contract that constitutes an eligible employment relationship for REF 2029
 - Can be staff working in the submitting HEI, who may be unpaid, but who are employed or engaged by an organisation other than the HEI

Eligibility of underpinning research outputs

- The underpinning research cannot be
 - Solely authored by research students
 - Produced by individuals employed by other HEIs, for example visiting professors
 - produced by current members of the submitting unit before they joined the HEI

ICS template: contextual information

- Title of the ICS, dates of underpinning research and impact
- Names, roles of underpinning researchers and those enabling the engagement and impact
- References (maximum 6)
- Sources to corroborate the impact
 - Maximum 10
 - Including up to 5 names
 - Only 1 testimonial per organisation preferred

ICS template: substantive content

- Total words over 3 sections: 2200
- Summary of impact (suggested words 100)
- Underpinning research (suggested words 600)
 - If discussing engagement as part of the research, please use more of the total word count for this section as necessary
- Details of the impact (suggested words 1500) May include
 - the engagement strategy and activities that enabled impact
 - any relevant indicators of responsible practices that enabled, sustained or enhanced the engagement or the impact

Confidential Impact Case Studies

- HEIs should have confidence to submit ICS that include confidential information with the prior agreement of the relevant organisation(s).
- Confidential ICS will only be shared with REF team and those involved in the assessment process.
- Panels criteria will address procedures for confidential material and be published after the Criteria phase
- Advance permission must be sought to submit ICS with Government Security Classification, and full guidance will be published as part of the Special Requests guidance

Additional ICS data requirements

- For externally funded research leading to impact
- This data will not be used for the assessment
- Please provide:
 - name(s) of funder(s)
 - [Research Organisation Registry \(ROR\)](#) identifier
 - name(s) of funding programme(s)
 - grant number(s)
 - amount of grant (in British pounds)
 - ORCID for each named researcher, where held
 - name(s) of formal partner(s)
 - country/countries/specific UK nation where the impact occurred

Thank you and stay in touch

- Use QR code to sign up for **REF updates** straight to your inbox.
- Please visit **get involved** on our website to view current opportunities.
- Email us at **info@ref.ac.uk** if you have any suggestions about how we can improve our guidance for you.

