

KE Funding Technical Expert Group

– Terms of Reference

Overview

Research England

We empower England's universities to advance knowledge, improve lives, and strengthen livelihoods by stewarding a world-leading research system that delivers real outcomes for the UK. As a guardian of academic excellence and integrity, we enable curiosity-driven discovery while strategically aligning with government priorities - especially economic growth and regional innovation. We serve the taxpayer by investing in impactful research, not just funding activity. Through deep sector insight, smart metrics, and agile funding models, we provide coherence across the system and respond quickly to national needs.

HEIF Review

The HEIF Review is examining how Research England's Knowledge Exchange formula funding is allocated to ensure the formula remains transparent, evidence-based and aligned with government priorities. It builds on the [HEIF Policies and Priorities](#), published in October 2025, which set out expectations around outcomes-focused accountability, alignment with national missions, and future adjustments to the allocation formula. The review is examining the effectiveness of current metrics and modifiers, distributional impacts across different types of higher education providers, and options for improving stability, predictability and strategic outcomes. This work will support the development of a refreshed funding model that better reflects the diversity of knowledge exchange activity, future-proofs the formula against budget changes, and strengthens accountability for public investment.

KE Funding Technical Expert Group

The KE Funding Technical Expert Group will provide advice to Research England on the analytical, methodological and design considerations underpinning the HEIF allocation model. The group's insight will help ensure the future formula is robust, transparent, evidence-based and able to accommodate future policy and budget scenarios.

Appointments will be made for an initial 4-month term. Research England may extend the group's duration beyond this period where additional engagement is required to support the HEIF Review. The expected time commitment is one online meeting per month for a 4-month period, time required for this will include reading papers in advance, attending the meeting, email correspondence, and supporting ad hoc queries. The group will be managed by the Research England Knowledge Exchange team. Meeting materials will be circulated at least one week in advance to support informed and equitable participation across all members.

Terms of Reference

1. Advise Research England's Knowledge Exchange directorate on the development of the HEIF funding formula and associated metrics, providing technical expertise on KE funding metrics, formula construction and analytical choices.
2. The Group's advice will be informed by their individual expertise, and the Group's make-up reflects the range of stakeholders with technical expertise related to Knowledge Exchange funding.
- a. The Group's advice will inform Research England decision making, but the ultimate decision on Research England's activities and direction will be taken by the Executive. A summary of the advice provided by the expert group will be published. Advice will be sought on several technical topics including but not limited to;
 - a. Performance measures
 - b. Formula mechanics, parameters and threshold testing
 - c. Data issues, interdependencies and modelling implications
 - d. Feasibility, proportionality and unintended consequences
3. The Group may be required to provide rapid advice on ad hoc technical questions arising through the HEIF review.
4. The Group's expert input will inform reports written by the KE Team to RE Council.

Membership

Membership has been selected based on the technical expertise required for the HEIF Review, in line with transparent and proportionate selection criteria. Research England will monitor the diversity of perspectives contributing to this work and, where gaps are identified, will seek additional wider engagement outside the group to ensure that a broad range of stakeholder views are reflected.

Table 1: Core membership of the KE Funding Technical Expert Group (bold), including observers from the OfS and devolved Funding Bodies.

Name	Organisation
Rhys Perry	Head of KE data & evidence Co-chair
Jessica Lucia	Senior Policy Advisor Co-chair
Tomas Coates Ulrichson	UCI Policy Evidence Unit
Jorge Velez Ospina	NCUB
Lauren Tuckerman	Innovation & Research Caucus
Rebecca Riley	City-REDI
Kirstie Cochrane	SCI
Michael Lee	UKRI policy analyst
Lyuba Dimitrova	UKRI policy analyst
Frederick Firth	DSIT analyst
Richard Niblett	RE analyst
Lara Allen	RE analyst
Bex Druguid	RE analyst

Halima Jibril	Innovation & Research Caucus
<i>Davina Benton</i>	<i>OfS (observer)</i>
<i>Fiona Bates</i>	<i>SFC (observer)</i>
<i>Corrine Nguyen</i> <i>Jonathan Davey</i>	<i>Medr (observers)</i>
<i>Ross Cameron</i>	<i>DfE NI (observer)</i>

Conflicts of Interest

Members must declare any actual, potential, or perceived conflicts of interest relating to discussions, evidence, or recommendations made by the Group. Research England will determine how any conflict should be managed, which may include recusal from specific discussions.

Given the nature of the HEIF funding model, it is recognised that most members will have institutional or professional interests; the expectation is that these are declared transparently and managed proportionately.

Confidentiality and Transparency

Members must maintain confidentiality of papers and discussions unless otherwise stated and agreed. Research England will publish a summary of the Group's advice following the conclusion of its work. Summaries of advice will be published without attributing comments to individual members unless otherwise agreed.

Approved: 17 April 2026