



# **COARA ACTION PLAN 2025–2027**

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## Introduction and organisational context

The Centre for Development Evaluation and Social Science Research (CREDI), an open research infrastructure founded in 2016, aims to strengthen the culture of evidence-based policymaking in Bosnia and Herzegovina and the wider Western Balkans region. Central to its mission is **reforming research assessment**, where CREDI values all research outputs, recognizing contributions beyond traditional metrics like journal publications. CREDI advocates for a more inclusive and comprehensive assessment of research, ensuring that diverse outputs and impacts are acknowledged. As an employer, CREDI provides equal opportunities to researchers based on their dedication to producing results that are relevant and impactful in policy and academic contexts.

As a signatory of the Agreement on Reforming Research Assessment (ARRA), CREDI is committed to advancing a shared framework to transform research assessment practices within and across research organizations. The goal is to improve the quality and impact of research by embracing a more holistic approach to evaluation. ARRA provides a set of principles, commitments, and a roadmap for these reforms, fostering a coalition of organizations dedicated to implementing them. Signatories share a common vision: research assessment should recognize a wide range of outputs, practices, and activities that contribute to research excellence and societal impact. This vision emphasizes qualitative judgment, with peer review as a cornerstone, supported by the responsible use of quantitative metrics.

This plan aligns with the broader reform movement led by the Agreement on Reforming Research Assessment (ARRA) and the Coalition for Advancing Research Assessment (CoARA). Together, they strive to create a more inclusive, collaborative space dedicated to a research system that delivers higher quality, greater impact, and improved efficiency. CoARA serves as a platform for experimenting with and developing innovative assessment criteria, methods, and tools, as well as for critical reflection, sharing best practices, and mutual learning. Organizations maintain full autonomy throughout the reform process, empowering them to choose their approach, set their own pace, and adapt strategies to their unique context—be it national, disciplinary, or specific to individual researchers—while remaining aligned with their strategic goals and mission.

CREDI's COARA Action Plan was developed through a participatory approach, allowing all team members to review and discuss the draft before it was adopted by management. The plan was developed to incorporate CREDI Open Access to Research Infrastructure Policy<sup>1</sup> and CREDI Gender Equality Plan<sup>2</sup>.

This plan aims to systematize CREDI's efforts to enhance research assessment by fostering an environment that values diverse research outputs and contributions. It emphasizes developing and implementing new, inclusive evaluation methods that go beyond traditional metrics, aligning with ARRA and CoARA's principles of broadening research impact. Through this plan, CREDI commits to continuous improvement, collaborative learning, and advancing best practices, ensuring that its approach to research assessment supports high-quality, impactful research that contributes meaningfully to evidence-based policymaking and societal progress in Bosnia and Herzegovina and the Western Balkans region.

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<sup>1</sup> <https://credi.ba/wp-content/uploads/2023/09/CREDI-Policy-for-Open-Access-to-RI-public-version-web.pdf>

<sup>2</sup> <https://credi.ba/wp-content/uploads/2023/09/GEP-CREDI.pdf>

## Operational action plan

To fulfil the mandate of the CoARA agreement, an institutional collective effort led by the Management Board and the Research Directorate of CREDI resulted in the creation of the following Action Plan. A dedicated Working Group was established, bringing together staff from different units, including researchers, data collectors, repository managers and administration. This Working Group meets regularly to monitor, assess, and adapt the progress of each Action within the plan.

The foundation of the Action Plan, referred to as Action 0, emphasizes the essential involvement of scientific staff and researchers at all career stages in implementing the plan's activities.

The CoARA Action Plan to advance research assessment in our institution includes the following 9 Actions:

<b>Action 0</b>	Engage scientific staff across all career stages in implementing the Action Plan
<b>Action 1</b>	Define institutional research evaluation principles.
<b>Action 2</b>	Revise research evaluation criteria in assessment processes for recruitment, career development, and tenure.
<b>Action 3</b>	Ensure gender equality, equal opportunity, and inclusivity in all assessment practices.
<b>Action 4</b>	Promote Open Science and Data Management as integral aspects of research assessment.
<b>Action 5</b>	Develop tools, dashboards, and metrics that reflect reformed assessment standards.
<b>Action 6</b>	Increase transparency and awareness of assessment indicators among researchers and management.
<b>Action 7</b>	Offer guidance and mentorship to support early-career researchers in career development.

<b>Action 8</b>	Communicate institutional decisions on evaluation practices and events transparently.
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This Action Plan establishes a framework for continual improvement and learning within our organisation, ensuring research assessment practices reflect both the CoARA mandate and our commitment to fostering impactful, inclusive, and high-quality social science research. The abovementioned actions are in more details elaborated in the following sections. For each action, the current status, action details and expected milestones are included.

## **Involve institutional scientific staff across career stages in all actions**

ACTION NUMBER: 0

### CURRENT STATUS

Feedback from stakeholders, particularly from senior researchers and project leads, has been increasingly considered in assessing research activities. In recent years, collateral activities beyond publications—such as knowledge transfer, training modules, public engagement events, and editorial work—have been added to the assessment reports of research teams and individual researchers. However, this feedback is currently gathered in an informal and unstructured manner, and researchers at all levels are only partially involved in the assessment process.

### ACTION DETAILS

To support the commitments of the CoARA agreement and our Action Plan, it is essential that researchers at every career stage be actively engaged in a structured and consistent manner. Named "Action 0" to reflect its foundational role, this initiative will drive researcher participation in all subsequent actions. Committees or working groups of researchers across different career stages will be established to promote organized feedback and discussion and coordinated with the centre's management.

Regular meetings and events will be organized to keep scientific staff updated on CoARA-related changes in research assessment and to foster an ongoing exchange of ideas. This mutual learning approach will enable researchers to share perspectives and provide structured feedback. A methodology for implementing this mutual learning process will be developed.

## EXPECTED MILESTONES

<b>Deadline</b>	<b>Activity details</b>
<b>End of 2025</b>	Develop methodologies for structured feedback from researchers regarding research assessment (e.g., create committees representing researchers at various career stages).
<b>End of 2026</b>	Complete at least one consultation round with researchers on relevant Action topics.
<b>End of 2027</b>	Ensure that all Actions incorporate researcher feedback into the CREDI's assessment processes, fostering a collaborative approach to research evaluation reform.



## Define institutional research evaluation principles

ACTION NUMBER: 1

### CURRENT STATUS

While fair and transparent practices guide many of CREDI's research assessment processes, a formal, publicly acknowledged framework for these practices has not yet been established.

### ACTION DETAILS

To align with CoARA commitments and ensure transparency, CREDI will define and publicly communicate its research evaluation principles—a comprehensive set of guidelines by which research assessment is conducted within the institution. These principles will reflect best practices outlined in the San Francisco Declaration on Research Assessment (DORA), the “European Charter for Researchers,” as well as CoARA's recommendations.

### EXPECTED MILESTONES

Deadline	Activity details
<b>End of 2026</b>	Finalize the research evaluation principles and obtain approval from the Management Board.
<b>Early 2027</b>	Publish the principles on CREDI's website, followed by dissemination to various stakeholders, including external stakeholders, internal evaluation panels, and researchers.

## **Review of research evaluation criteria in assessment procedures for career path evaluation (hiring, career development)**

ACTION NUMBER: 2

### CURRENT STATUS

CREDI has evaluation criteria that consider various types of research outputs, but these are not structured. In addition, these criteria need continuous review, updates, and clear communication with all stakeholders involved in research assessment.

### ACTION DETAILS

The relevant departments plan to continue existing training and development activities for both scientific and administrative staff, while implementing enhancements to hiring and evaluation processes as follows:

- Revise and adapt procedures for selecting, hiring, and evaluating CREDI's scientific staff to align with EU recommendations and CREDI's institutional principles for research assessment (see Action 1).
- Improve feedback mechanisms for all applicants involved in the recruitment process.
- Increase transparency in job postings, contract terms, and salary information, aligning with recommendations from the European Council.

Additionally, this Action will involve updating evaluation materials and templates to better capture a broader range of research contributions, such as leadership roles, international collaborations, and mentorship, ensuring compliance with the principles outlined in Action 1 and Action 7.

## EXPECTED MILESTONES

<b>Deadline</b>	<b>Activity details</b>
<b>End of 2025</b>	Complete review of selection, hiring, and career evaluation procedures.
<b>End of 2026</b>	Enhance awareness of career development opportunities and improve transparency.
<b>End of 2027</b>	Strengthen the feedback system for applicants and provide training for evaluators and panel members, including organizing training events for all staff involved in hiring processes.

## **Ensure gender equality, equal opportunities, and inclusiveness in the assessment processes**

ACTION NUMBER: 3

### CURRENT STATUS

CREDI has implemented a Gender Equality Plan (GEP)<sup>3</sup> that structures initiatives supporting gender equality, equal opportunities, and inclusiveness. Specifically, the GEP includes Objective 2.1. Ensure gender equality in recruitment and evaluation of employees and Objective 2.2. Support the gender equal career progression. According to GEP, there is a plan in 2025 to develop policies and measures aiming to promote and ensure gender equality in the engagement of staff and external associates.

### ACTION DETAILS

- Conduct an analysis of the evaluation and assessment procedures used at CREDI, aligning this action with the findings from Actions 1 and 2.
- Develop concrete proposals for research assessment criteria and best practices that promote equal opportunities, inclusiveness, and the value of diversity.
- Provide guidelines on addressing unconscious bias in evaluation processes to ensure fair assessment criteria in specific contexts.
- Create online training modules for evaluators at all levels, focusing on gender equality and inclusivity in assessment practices.
- Publicly release the GEP annual report, accompanied by dissemination activities to engage the wider community.

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<sup>3</sup> <https://credi.ba/wp-content/uploads/2023/09/GEP-CREDI.pdf>

## EXPECTED MILESTONES

Deadline	Activity details
<b>End of 2025</b>	Develop policies and measures aiming to promote and ensure gender equality in the engagement of external associates.
<b>End of 2026</b>	Integrate policies and measures aiming to promote and ensure gender equality into research assessment practices.

## **Support Open Science and Research Data Management as new practices to be recognized in research assessment**

ACTION NUMBER: 4

### CURRENT STATUS

CREDI has already developed comprehensive policies regarding the Data Archive for Social Sciences in Bosnia and Herzegovina (DASS-BiH)<sup>4</sup>, which include guidelines for the deposition of research data. These guidelines emphasize the importance of Open Science and Research Data Management (OS & RDM) in enhancing research transparency and accessibility. Training sessions, webinars, and events aimed at early-career researchers are organized regularly to promote these practices. CREDI actively participates in national and international working groups and engages in various initiatives, including European projects, to foster collaboration and networking. As part of its ongoing efforts, CREDI is committed to refining its institutional RDM strategy to maximize the value of research data and support innovative scientific approaches.

### ACTION DETAILS

- Enhance the existing OS & RDM guidelines into a more comprehensive policy, offering precise operational guidance and tools for researchers to facilitate the deposition of research data.
- Communicate the updated policy internally to researchers, organizing training sessions and informational events to highlight the principles of Open Science (integrity, reproducibility, efficiency), alongside the benefits, challenges, and pathways to openness (see also Actions 6 and 8 for strategies to raise awareness and communicate changes).

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<sup>4</sup> <https://dass.credi.ba/policies-and-procedures/>

- Develop incentives to promote improved management and recognition of research outputs beyond traditional publications, such as awards and recognition badges.

#### EXPECTED MILESTONES

<b>Deadline</b>	<b>Activity details</b>
<b>End of 2025</b>	Release the enhanced policy on Research Data Management, incorporating guidelines for the deposition of research data.
<b>End of 2026</b>	Establish connections between the updated guidelines and policies, metrics, and informative dashboards for tracking RDM practices.
<b>End of 2027</b>	Conduct follow-ups and provide guidance on the integration of OS & RDM practices into research assessment activities.

## **Develop tools, dashboards, and metrics embracing the reformed assessment**

ACTION NUMBER: 5

### CURRENT STATUS

CREDI currently lacks structured dashboards and tools for research evaluation. Although efforts have been made to gather data for evaluation processes, the existing tools do not provide a comprehensive or organized framework for assessing research outputs and activities. Therefore, the focus is on developing systems that will enhance data accessibility and usability for researchers.

### ACTION DETAILS

- Develop and implement structured tools and dashboards that effectively recognize the diversity of research activities and outputs at CREDI.
- Incorporate indicators related to Open Science, early knowledge sharing, and research data management into the new tools, aiming to provide a comprehensive overview of research activities.
- Explore the use of open bibliographic and citation databases to create transparent, reproducible research metrics that align with CoARA principles. This approach will emphasize a diverse range of indicators, including technology transfer and contributions to diversity and inclusion within research practices.
- Ensure that the new tools will facilitate the inclusion of qualitative aspects of research and enhance the evaluation of non-traditional research outputs.



## EXPECTED MILESTONES

<b>Deadline</b>	<b>Activity details</b>
<b>End of 2025</b>	Design and prototype structured tools and dashboards tailored for CREDI's research evaluation needs.
<b>Mid-2026</b>	Analyse measurable aspects of research activities, utilizing findings from the CoARA Working Group on "Responsible Metrics and Indicators" to inform the development of these tools.
<b>End of 2026</b>	Integrate new informative indicators into evaluation reports, including those related to Open Science, pre-prints, data sharing, and diversity and inclusion. Proposals for these indicators will be discussed with management and researchers for feedback and refinement.
<b>2025-2027</b>	Conduct assessments of the new indicators and dashboards, ensuring their principles and content are communicated and shared with the scientific staff, as outlined in Action 0.

## **Raise awareness and enhance transparency on assessment indicators with researchers and management**

ACTION NUMBER: 6

### CURRENT STATUS

Currently, CREDI provides some training for early-career researchers regarding indicators for research monitoring and metrics used in evaluation processes. When assessing individual researchers, research groups, and domains, CREDI shares details of the indicators used in a clear and thorough manner with all relevant parties.

### ACTION DETAILS

- Organize seminars and events focused on research assessment, specifically designed for scientific staff, including PhD students and early-career researchers. These events will familiarize attendees with commonly used indicators, as well as qualitative and quantitative evaluation practices aligned with the CoARA framework and the new research assessment protocols.
- Define, structure, and make available a comprehensive set of tools used by evaluators for various monitoring activities to ensure clarity and consistency in the evaluation process.

### EXPECTED MILESTONES

<b>Deadline</b>	<b>Activity details</b>
<b>End of 2025</b>	Conduct an introductory presentation for all scientific staff detailing the current state of research assessment at CREDI, along with plans for integrating the CoARA approach into CREDI's tools and systems.
<b>End of 2027</b>	Redefine and share the comprehensive set of tools and resources established by CREDI for research monitoring and evaluation, ensuring that they are accessible internally at all levels.

## **Provide guidance to enable effective career mentoring for early-career researchers**

ACTION NUMBER: 7

### CURRENT STATUS

CREDI has initiated separate mentoring activities focused on early-career researchers, aimed at providing direct career orientation, as well as on senior staff in supervisory roles through the development of mentoring guidelines.

### ACTION DETAILS

1. Develop comprehensive mentoring guidelines for senior staff that will include both written documentation and supervisor training to enhance their mentoring effectiveness.
2. Continue implementing introductory courses aimed at early-career researchers, covering essential topics such as research careers, funding opportunities, and entrepreneurship. Additionally, continue with a senior-to-junior mentoring scheme to facilitate knowledge transfer and support for early-career staff. These initiatives align with the recommendations for career development and mentorship outlined in the latest European Charter for Researchers.

### EXPECTED MILESTONES

<b>Deadline</b>	<b>Activity details</b>
<b>2025-2027</b>	Complete series of training programs for both supervisors and early-career researchers, ensuring comprehensive support is available for effective career development.

## **Communicate institutional decisions on evaluation processes and evaluation events**

ACTION NUMBER: 8

### CURRENT STATUS

CREDI has unstructured procedures concerning the hiring, promotion, and renewal of scientific staff, which are currently available only internally. At present, institutional decisions regarding changes to evaluation processes and the criteria that will follow the implementation of CoARA are communicated internally and are not yet publicly accessible.

### ACTION DETAILS

To enhance transparency, it is essential to develop a strategy for communicating institutional decisions related to research assessment activities and the indicators that support these evaluations, both internally and externally. The objective is to ensure that these decisions are eventually documented in institutional procedures and made available to all scientific staff.

- **Internal Communication:** Ongoing discussions with all research staff will continue with the aim to provide a detailed overview of decisions on evaluation processes, which will be compiled and made accessible for all staff. This will include specific descriptions of every evaluation event that takes place at CREDI.
- **External Communication:** A mutual learning process with external stakeholders will be initiated to facilitate the organization and future communication of CREDI's decisions regarding evaluation processes.

### EXPECTED MILESTONES

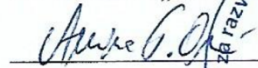
Deadline	Activity details
<b>End of 2024</b>	Begin the dissemination and promotion of the CREDI Action Plan and the forthcoming changes to research assessment practices.
<b>End of 2025</b>	Provide a detailed overview of internal evaluation processes, including the indicators, metrics, and tools that will be adopted for each specific process.
<b>2025-2027</b>	Continue the ongoing dissemination of information related to these topics, ensuring alignment with the latest changes, adaptations, and findings in research assessment, ultimately aiming for transparent publication in the future.

## Monitoring and updating of the Action Plan

This Action Plan is subject to regular evaluation and review to ensure continued relevance of the CREDI procedures and to detect any changes needed. Therefore, the plan goes under the periodic review every three years based on the results of progress reports envisaged to be completed by the end of 2025 and 2026.

Sarajevo, 11.11.2024.

FONDACIJA „CREDI“



Amina Tabaković Oruč

