

CoARA Outputs Endorsement Process Guidelines

SUBMISSION & PUBLICATION PROCESS FOR
COARA OUTPUTS

COARA SECRETARIAT

April, 2026

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Document version overview

Revision history			
Version	Date	Revised by	Comments
1.0	12-05-2025	Dr. Erzsébet Toth Czifra, Colette Schrodi, Katrina Gibbs, Tereza Szybisty	First draft
2.0	19-09-2025	Katrina Gibbs, Dr. Estradivari, Dr. Erzsébet Toth Czifra, Damini Pantaleon	Working draft based on WG feedback and operational functions put in place since the adoption of the Endorsement Framework in June 2025
3.0	8-10-2025	Katrina Gibbs Damini Pantaleon	Updated revision
4.0	20-4-2026	Katrina Gibbs Damini Pantaleon	Revised section on Type A Community Consultation and Type A outputs consolidated feedback template added. Includes updates on the CoARA Collection resource library, publicly launched in February 2026.

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Introduction

This document provides a concise overview and practical guidance on the [Endorsement Framework](#) process for the submission, publication, and dissemination of outputs produced by the CoARA community. The Endorsement Framework supports Nominator Groups, including CoARA Working Groups and National Chapters, as well as Cascade Funding Beneficiaries and nominated Third Parties¹.

These guidelines are conceived as a living document that welcomes feedback to further streamline and improve processes, along with the evolving needs of the CoARA community.

The current version (October 2025) outlines the step-by-step process for endorsement submission, review, and final publication. It also provides guidelines on design principles for CoARA publications, as well as an overview of dissemination support.

Endorsement process: a step-by-step guide

Following the formal adoption of the [Endorsement Framework](#) at the General Assembly on 23 June 2025, the processes for endorsement and publication of CoARA outputs have now been put in place for two types of CoARA outputs, Type A: Actionable Policy Resources and Type B: Evidence Review Documents.

[Please click here to access a presentation](#) including a detailed overview of the Endorsement Framework process as of October 2025, including the full-size infographics provided in the following sections.

The following sections include an **overview of the Endorsement Framework** and a detailed **step-by-step submission and publication process guide**.

Overview of the Endorsement Framework

The Endorsement Framework aims to establish a means to consider outputs and build consensus within the coalition around tools that support [CoARA's Commitments](#). The Endorsement Framework provides a mechanism for the review of outputs by the

¹ For Type A outputs, characterised as Actionable Policy Resources, that are produced by third parties, i.e., non-CoARA members, can be nominated for endorsement by a CoARA WG, NC or by the SB itself.

CoARA community and the CoARA Steering Board. The framework also aims to facilitate the uptake of tools, recommendations, guidelines, and more to further advance reform efforts by consolidating outputs endorsed by the CoARA community and Steering Board in the [CoARA Collection](#), our community-owned resource library providing practical and context-based tools for reform.

The framework distinguishes between two principal types of outputs that determine their corresponding endorsement routes:

- Type A: Actionable Policy Resources
 - o Tools, frameworks, and actionable recommendations that promote the uptake of reform efforts and facilitate direct implementation of the commitments to ARRA.
 - o Subject to SB review and endorsed Type A outputs to be included in the CoARA Collection.
 - To facilitate SB review, feedback and revisions from Community Consultations should be summarised using the CC Feedback Template document (see *Step 3*, p. 12 for more details).
- Type B: Evidence Review Documents
 - o These documents provide supporting evidence and context-based reflection to support in-depth understanding of the needs, challenges, and potential solutions for research assessment reform but cannot be directly implemented.
 - o Subject to Community Consultation only and endorsed Type B outputs to be linked to the CoARA Collection.

See below for more details on an overview of the process, endorsement routes, and output type descriptions.

Overview of the Endorsement Process:

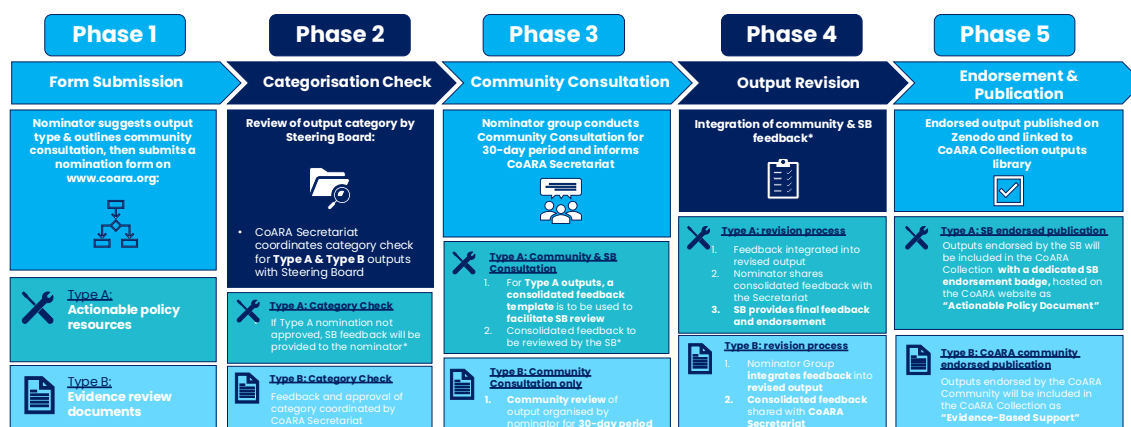


Figure 1: Overview of the Endorsement Process

Details of Endorsement Route for Type A Outputs:

Type A: Actionable Policy Document

Type A description	Examples	Endorsement route
Actionable Policy Document		1. CoARA community consultation organised by the Nominator Group
Tools, frameworks, recommendations that help the CoARA community to implement the commitments of ARRA.	<ul style="list-style-type: none"> Frameworks Guidelines Tools and toolkits Initiatives Declarations Games and interactive tools 	2. Revision of outputs by Nominator Group
Require Community Consultation and endorsement from the CoARA Steering Board.		3. Review and endorsement by Steering Board
		4. Endorsed by the CoARA Steering Board and included in CoARA Collection as "Actionable Policy Document" output

Figure 2: Type A endorsement route

Details of Endorsement Route for Type B Outputs:

Type B: Evidence-Based Support

Type B description	Examples	Endorsement route
Evidence-Based Support		1. CoARA community consultation organised by the Nominator Group
Reflective documents that provide evidence, contextual, or auxiliary information to support RRA, but cannot be directly implemented.	<ul style="list-style-type: none"> • Reports from pilots • Literature reviews • Collections of good practices • Conference reports • Survey findings • Workshop/focus group summaries 	2. Revision of outputs by Nominator Group
Require Community Consultation by relevant WGs, NCs, or invited reviewers organised by Nominator Group.		3. Endorsed by the CoARA community and included in CoARA Collection as "Evidence-Based Support" output

Figure 3: Type B endorsement route

Step-by-step process for submission and publication of outputs

Following the establishment of the Endorsement Framework and the first output submitted for endorsement, the current process for nominating outputs for endorsement includes a five-step approach that aims to facilitate transparency and exchange between the Nominator Group, Secretariat, Steering Board, and broader CoARA community throughout the process.

Please find an overview of the process and step-by-step guide below:

[Step-by-step practical guide of the Endorsement process:](#)

Step-by-step practical guide

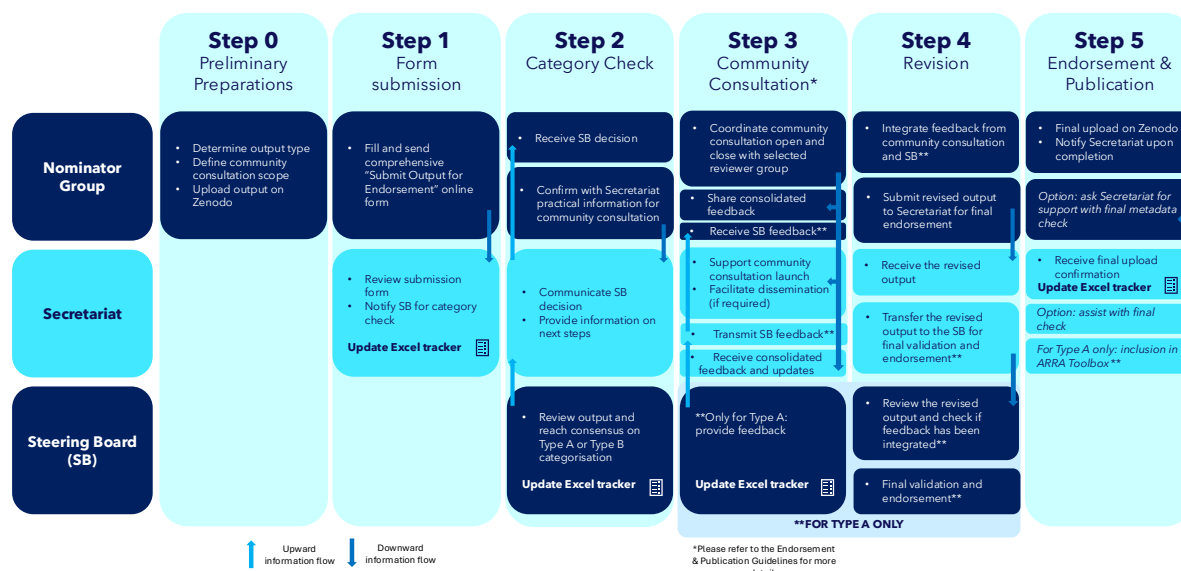


Figure 4: Step-by-step practical guide of the Endorsement process

Step 0: Preliminary phase

When drafting their output, Nominator Groups are expected to be aligned with the ARRA commitments as described in the [Endorsement Framework](#).

Nominator Groups determine their output type (type A or type B) and define the scope of the Community Consultation (i.e. individuals, CoARA bodies, open consultation) prior to the submission of the output for nomination.

Prior to the submission of the online form, the Nominator Group should upload their output on the [dedicated Zenodo community](#). This step is required before proceeding to Step 1: the submission of the nomination form.

By default, outputs should be made available with open access. However, the Nominator Group can choose to restrict access if they prefer. In such cases, the restricted access must be shared with the CoARA Secretariat.

Alternatively, Nominator Groups may choose to share their draft output via Google Drive or an alternative platform offering access to a downloadable PDF version of the output. This is up to the discretion and preferences of the Nominator Group.



Figure 5: Visual layout of the dedicated Zenodo community

Step 1: Fill-in the online “Submit Output for Endorsement” form

Nominator Groups **submit their nomination of an output as Type A or Type B on the online form: “Submit Output for Endorsement”**. The form covers the identification of the Nominator Group, output type and details, the Community Consultation type (i.e. limited expert review or open consultation) and details, and metadata.

Define requirements for the Community Consultation

In the form, Nominator Groups for both Type A and Type B are expected to determine the scope of the Community Consultation (i.e. limited expert review or open consultation) and provide detailed information about their targeted community reviewer group, including the type of community, contact information of the reviewers (if any individuals), and the desired consultation period.

Provide relevant metadata and abstract for output in nomination form

In the form, Nominator Groups for both Type A and Type B are expected to provide detailed metadata to be later used for categorisation and tagging purposes on Zenodo and the CoARA website. Note that the abstract description provided should also be considered as a draft description of the output to provide an overview for readers, published on the CoARA website.

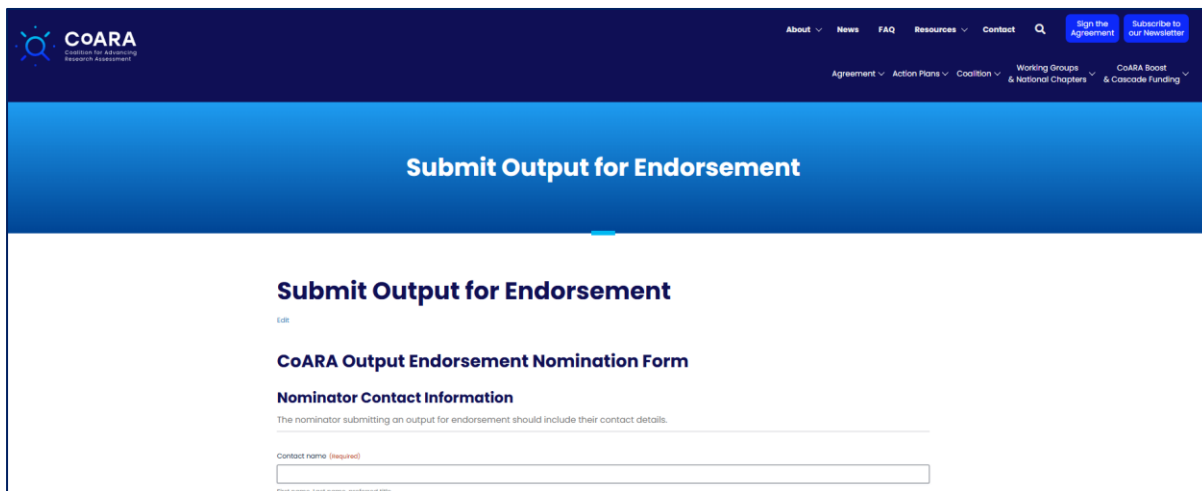


Figure 6: Screenshot of the official dedicated submission form available on the CoARA website

Step 2: Category check

Once the form has been submitted by the Nominator Group, the CoARA Secretariat will review the submission and conduct a categorisation check.

- **Type A nominated outputs** (Figure 2) are subject to review and feedback from the CoARA Steering Board. For more details on the review process, please refer to Section 3 “Review, revision and endorsement processes” in the [Endorsement Framework](#).

The SB review process will be facilitated by the CoARA Secretariat.

- **Type B nominated outputs** (Figure 3) do not require SB review and will proceed directly to Step 3 following categorisation check from the CoARA Secretariat.

Step 3: Community Consultation Period

Community Consultations are required for both Type A and Type B outputs. The Community Consultation period can occur prior to submission of the output for endorsement, but information on the type of reviewer group and consolidated feedback must be provided to complete the endorsement process.

Nominator Groups are expected to communicate with the CoARA Communication Office to confirm the steps and process for the Community Consultation, as defined in the “Submit Outputs for Endorsement” form.

The feedback gathered from the Community Consultation should provide consolidated and actionable feedback that ensures the output addresses CoARA Commitments.

Nominator Groups have the choice between having a **limited expert review** or an **open**

consultation.

Nominator Groups are expected to act as the **primary coordinator** of the Community Consultation and ensure the respect of the [CoARA Code of Conduct](#).

The CoARA Secretariat may offer operational support in the following ways:

	Limited Expert Review	
	CoARA website*	Alternative platforms
Support provided by the CoARA Secretariat	<ul style="list-style-type: none"> - Output uploaded to a dedicated webpage on the "Community Consultation" section of the CoARA website - Webpage will be restricted to the Community Reviewer group with password protection and email login - Unique link and password provided to the Nominator Group 	No support offered.
Actions required by the Nominator Groups	<ul style="list-style-type: none"> - Unique link and password shared to the defined Community Reviewer - Opening and closing of the community consultation - Gathers and provides consolidated feedback to Secretariat by email 	<ul style="list-style-type: none"> - Coordinates opening and closing of the Community Consultation period and keeps the CoARA Secretariat informed - Moderates and manages the consultation on the chosen platform

	Open Consultation	
	CoARA website*	Alternative platforms
Support provided by the CoARA Secretariat	<ul style="list-style-type: none"> - Output uploaded to a dedicated webpage on the "Community Consultation" section of the CoARA website - Webpage will be password protected and require email login (no additional information about the reviewers will be captured) - Open consultation disseminated via CoARA communication channels (i.e. LinkedIn, blog post, CoARA mailing list, and/or newsletter) 	<ul style="list-style-type: none"> - Open consultation disseminated via CoARA communication channels (i.e. LinkedIn, blog post, CoARA mailing list, and/or newsletter) using the drafts provided by Nominator Groups

	newsletter) using the drafts provided by Nominator Groups	
Actions required by the Nominator Groups	<ul style="list-style-type: none"> - Prepare and share drafts for CoARA communication channels (i.e. LinkedIn, blog post, CoARA mailing list and/or newsletter) - Moderates comment section - Gathers and provides consolidated feedback to Secretariat by email 	<ul style="list-style-type: none"> - Provides links to access the output and feedback form (if relevant) to the CoARA Secretariat - Prepare and share drafts for CoARA communication channels (i.e. LinkedIn, blog post, CoARA mailing list and/or newsletter) - Coordinates opening and closing of the Community Consultation period and keeps the CoARA Secretariat informed - Moderates and manages the consultation on the chosen platform - Gathers and provides consolidated feedback to Secretariat by email

*For outputs hosted on the CoARA website: an access will be provided to a password protected, dedicated webpage with a comment section for feedback to be gathered and provided as consolidated feedback to the CoARA Secretariat. Reviewers will provide a name and email to login to provide feedback in the comment section. No additional information will be captured on the reviewer profile and emails will not be publicly visible. Please note that the names used will be visible on the password protected Community Consultation page.

The Nominator Group is required to provide consolidated feedback to the CoARA Secretariat by email at the end of the community consultation period.

For Type A outputs only, the Steering Board will review the integration of the feedback provided during the Community Consultation period. For Type A outputs, the Steering Board will review how the authors integrated the feedback into the revised output.

To facilitate this review process, Nominator Groups should provide a consolidated overview of the main feedback received, highlighting the most critical feedback outlined in key themes and explaining how the feedback was integrated into the revised output.

[Please click here to use the template for consolidated feedback of Type A outputs](#) to ensure clarity and to facilitate the Steering Board review process.

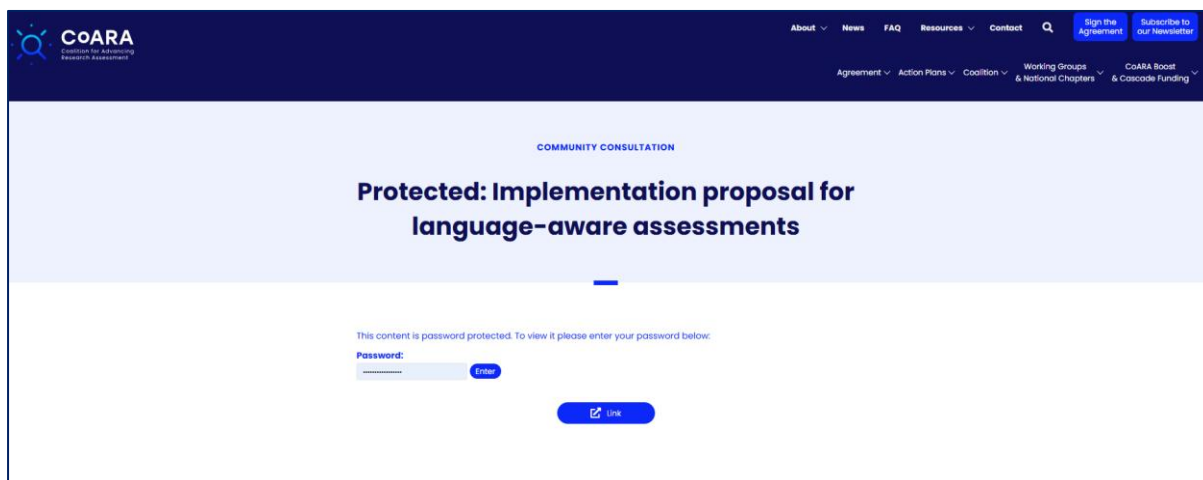


Figure 7: An example of a restricted Community Consultation webpage

Step 4: Output Revision

Following Community Consultation, Nominator Groups are expected to integrate feedback from the Community review into their Type A or Type B output.

- **For Type A and Type B outputs:** the Nominator Group will integrate feedback from the community review into their output. Revised output should be submitted to the CoARA Secretariat by email.
- **For Type A outputs only:** the Steering Board will review the integration of feedback to the revised output following the Community Consultation period.
 - o The Steering Board will consider whether revised outputs have adequately integrated or considered feedback from Step 3: Community Consultation. Additionally, the Steering Board will consider whether the implementation option is in line with the ARRA commitments.
 - o Following review of the revised output, the Steering Board will provide final validation and endorsement, or final feedback.
 - o See *Endorsement Framework Section 3.4 Steering Board review for more details*.

Step 5: Final Publication of the Output

Once the consultation period is over and the Nominator Group has integrated the feedback received, an updated version of the output should be published on Zenodo. Note that once published on Zenodo, outputs cannot be deleted, however, revised versions of the output may be uploaded ([see the Zenodo guideline on creating updated versions](#)).

Optionally, Nominator Groups are encouraged to coordinate a review of the final Zenodo publication with the CoARA Secretariat to ensure that all relevant metadata has been

included. The metadata provided on Zenodo will be used for publication, categorisation, and tagging on the [CoARA Collection](#), hosted on the CoARA website.

Publication description and metadata

When finalising the publication of the output, Nominator Groups should ensure that the following information is clearly outlined in the publication description and metadata²:

- 100-250 words abstract:
 - o An abstract will be used as the output description on the CoARA website following endorsement.
 - o Abstracts should include usage scenarios where applicable.
- Author and contributor information:
 - o Producers (co-authors), project leaders (i.e., WG Co-Chairs), editors, and reviewers should all be included on the Zenodo publication and in the document summary (*see Contributor Roles below for more details*).
- Target audience:
 - o Indicate who the output is intended based on organisation type (i.e., Research Funding Organisations, Universities, etc.). This will later be used as a category filter on the CoARA Collection, hosted on the CoARA website.
- CoARA Commitments addressed:
 - o Identify which Commitments have been addressed by the output. This will later be used as a category filter on the CoARA Collection, hosted on the CoARA website.
- Keywords and implementation cases (optional)
 - o Keywords can be included to further facilitate tagging and faceted search functionality.
 - o Providing links to implementation cases is also encouraged, but not mandatory.

Classification and publication of endorsed outputs in the CoARA Collection

As a conclusion of the endorsement process, endorsed outputs will be hosted on the CoARA website, linked to their Zenodo publications, for additional visibility in a user-friendly, categorised, searchable [CoARA Collection](#). See *Dissemination Support* section for more information.

² Ideally, all metadata information will be included upon initial submission of the output nomination form. Prior to final publication, please ensure that all the metadata information has been properly updated in the Zenodo publication and output summary, including reviewer acknowledgements.

- Type A Outputs will be included in the CoARA Collection with a distinct endorsement badge as Actionable Policy Documents endorsed by the CoARA Steering Board.
- Type B Outputs will be categorised as Evidence-Based Support endorsed by the CoARA Community.

For an overview of the different platforms involved in the submission and publication process, please refer to the figure below:

Platform guide for Nominator Groups



Figure 8: Overview of the different platforms used by Nominator Groups along the Endorsement Framework process

Publishing on Zenodo: additional information

Nominator Groups' outputs are to be published on Zenodo on the dedicated "[CoARA Output Submissions for Endorsement](#)" community. Additionally, finalised and endorsed outputs should be linked to relevant CoARA communities, including:

- [CoARA Working Groups](#)
- [CoARA National Chapters](#)
- [CoARA Boost Cascade Funding Beneficiaries](#)

All outputs will be published on Zenodo from the outset of the submission process. Note that once an output is published on Zenodo, it cannot be deleted; however, the version of the output can be continually updated.

- [Click here for a general Zenodo publication guide.](#)
- [Click here to learn more about updating versions on Zenodo.](#)

Zenodo allows for the publication of most research outputs, including datasets, preprints, reports, software, posters, presentations, and more. Should a Nominator Group output not be supported on Zenodo, please contact communication@coara.org who will support you in identifying a solution.

Outputs published on Zenodo should include a concise abstract, relevant keywords, information on the intended audience (i.e. organisation type), as well as author and reviewer information (see below under “Contributor Roles” for more details). This metadata is key for categorising and linking outputs from Zenodo back to the [CoARA Collection](#) on the www.coara.org website.

Contributor Roles

In line with CoARA’s principles, Nominator Groups are encouraged to capture the diversity of contributions made to their outputs and credits a variety of contributors. Below are recommendations on how to transparently reflect different contributor roles:

Contributor Role	Use Case
Producer	Co-authors who have actively contributed to the outputs.
Project Leader(s)	WG Co-Chairs, NC Co-Chairs, or project leads on Cascade Funding Projects.
Editor	Contributors who offered support such as proofreading, formatting, or other logistic support such as coordinating the creation of the output.
Other	Reviewers or other contributors (e.g. sponsors, data collector, etc.).

In addition to these contributor roles, Nominator Groups are welcome to add contributors following the credit taxonomy and other contributor roles offered by Zenodo. [Click here for more details.](#)

Working Groups are also encouraged to use ORCID IDs in their accreditation practices. [Click here for more details.](#)

Contributors to outputs, as well as **clear versioning information**, should be listed on the **summary page in the output**. Summary pages and versioning information on the output should be updated and aligned with versioning information on Zenodo.

Nominator Groups are also encouraged to acknowledge reviewer contributions in the document summary and on the Zenodo publication.

Dissemination Support

Endorsed outputs will be hosted on Zenodo and then linked to the CoARA website under the [CoARA Collection](#), a community-owned resource library offering practical and context-based tools for reform. Both Type A and Type B outputs will be hosted on the website library, categorised as Actionable Policy Documents and Evidence-Based Support.

- **Only Type A outputs** will be categorised as **Actionable Policy Documents** with an official Steering Board endorsement badge to enhance visibility for **implementation tools** to serve the CoARA community.
- **Type B outputs** will be categorised as **Evidence-Based Support** in the library to offer a rich pool of resources to advance research assessment reform.

Each output can be filtered by output type, creator group, and related CoARA Commitments. Please see below for more details on the CoARA Collection.



Figure 9: Screenshot of the CoARA Collection hosted on the CoARA website

The CoARA Secretariat offers support to further increase visibility of outputs produced by the CoARA Working Groups through the following channels:

1. Posts on CoARA's social media channels to highlight the publication of outputs ([click here for an example](#));
2. Highlighting key features of the output in a blog post hosted on the CoARA website ([click here for an example](#));
3. Presenting key findings from WG Co-Chairs and project leads in the upcoming CoARA Spotlight series (online knowledge exchange events to begin in November 2025);
4. Featuring outputs in the [CoARA Newsletter](#);
5. Targeted email campaigns to defined subsets of CoARA members (i.e., Working Groups, country-specific demographics, or random sampling).

To request detailed dissemination support in addition to the [CoARA Newsletter submission form](#) from the CoARA Secretariat, please send an email to communication@coara.org.

To ensure that your request is well received, please follow the steps below:

- Select a main point of contact for dissemination requests on behalf of the Nominator Group and keep relevant members in CC as needed.
- Inform communication@coara.org about your upcoming publication timelines, including the desired consultation period, community reviewers, links to outputs, desired platforms for dissemination, etc.
- Provide a draft for email send-outs, social posts, blog posts, and/or newsletter submissions with including a brief description of the output.
- Provide a clear outline of communication support needed and the desired timeline for dissemination. In case an output is open for community consultation, details about that are also to be specified.
- Co-define a communication strategy and roll-out plan for the output dissemination with CoARA Communications.
- Please anticipate response time of **3-5 working days for CoARA Communications** to accommodate your requests.

CoARA Style Guidelines

- **Template for CoARA Working Group outputs:** [Please click here.](#)
- **CoARA Communications Package:** [please click here to access the zip file for CoARA branded elements.](#) The zip file for CoARA branded elements includes the

following:

- Templates: CoARA Working Group output template. [Please click here.](#)
- Brand Guidelines: use of the CoARA logo.
- Fonts: Poppins and Avenir Next LT Pro.
 - The Poppins font is to be used for titles and subtitles as shown in this document and accompanying letterhead templates.
 - The Avenir Next LT Pro font is to be used for body text with 11-point font size, as shown in this document and accompanying letterhead templates.
- Logos: CoARA and EU-funded.
- Colours: #00b8f2, #0d29f9, #004494, #0F0F55, #EEF2FF.



Figure 10: CoARA Visual Identity

- See [CoARA logo guidelines document](#) for more details.
- Images for social media dissemination: CoARA support badge and Working Group icons.
- PowerPoints: CoARA branded PowerPoints for meetings and webinars.
- CoARA Working Groups should use the CoARA WG Publication template with corresponding fonts in the template for their outputs, as outlined above.
- **Summary pages** for CoARA outputs should include the relevant information of the publication, including the authors, date of publication, version information, summary, and status of the output.
- **CoARA outputs** should be written in **British English** with **justified alignment** and **1.15 spacing**. Pages should be numbered on the bottom right-hand side of the page, as shown in this document.
- CoARA outputs should be **licensed under [Creative Commons 4.0](#)** by default.

- CoARA Working Groups are encouraged to use their custom icons for dissemination on social media. Please see below for an example:



Figure 11: WG OI4RRA Social Icon example

We look forward to receiving your outputs and working in close collaboration to ensure that outputs are made visible and accessible across the community. We thank all members for your contributions to date, and we are excited to collectively build a rich pool of resources to be shared among the coalition and beyond together!