

SCOPE+i Resources for an open science (OS) aware responsible research assessment (RRA) process

Federation of Finnish Learned Societies
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What are SCOPE+i Resources?

Resources (earlier referred to as OSAF resources)

- are 16 practical documents in form of guides, templates, checklist and toolbox
- based on what is already published
- support understanding of SCOPE Framework for evaluating research in a responsible way
- disseminate concept of open science (OS) aware responsible research assessment (RRA)
- provide templates for the use of organizations to fit their needs
- provide considerations and guides for all phases of research assessment process

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Why to familiarize and adopt SCOPE+i Resources?

Resources

- are aligned with the SCOPE Framework
- aim to facilitate the transition towards RRA with particular focus on contributions to Open Science (OS)
- help to understand the complexities of RRA reform
- support the structured organization of research assessment process and information from initial planning through to the publication of assessment protocols
- can be used for assessment of researchers and different types and sizes of research entities like organizations, countries or all disciplines.
- can be used and customized by organizations to fit their needs.
- are useful also in training/orientation sessions e.g. for new employees or PhD students.

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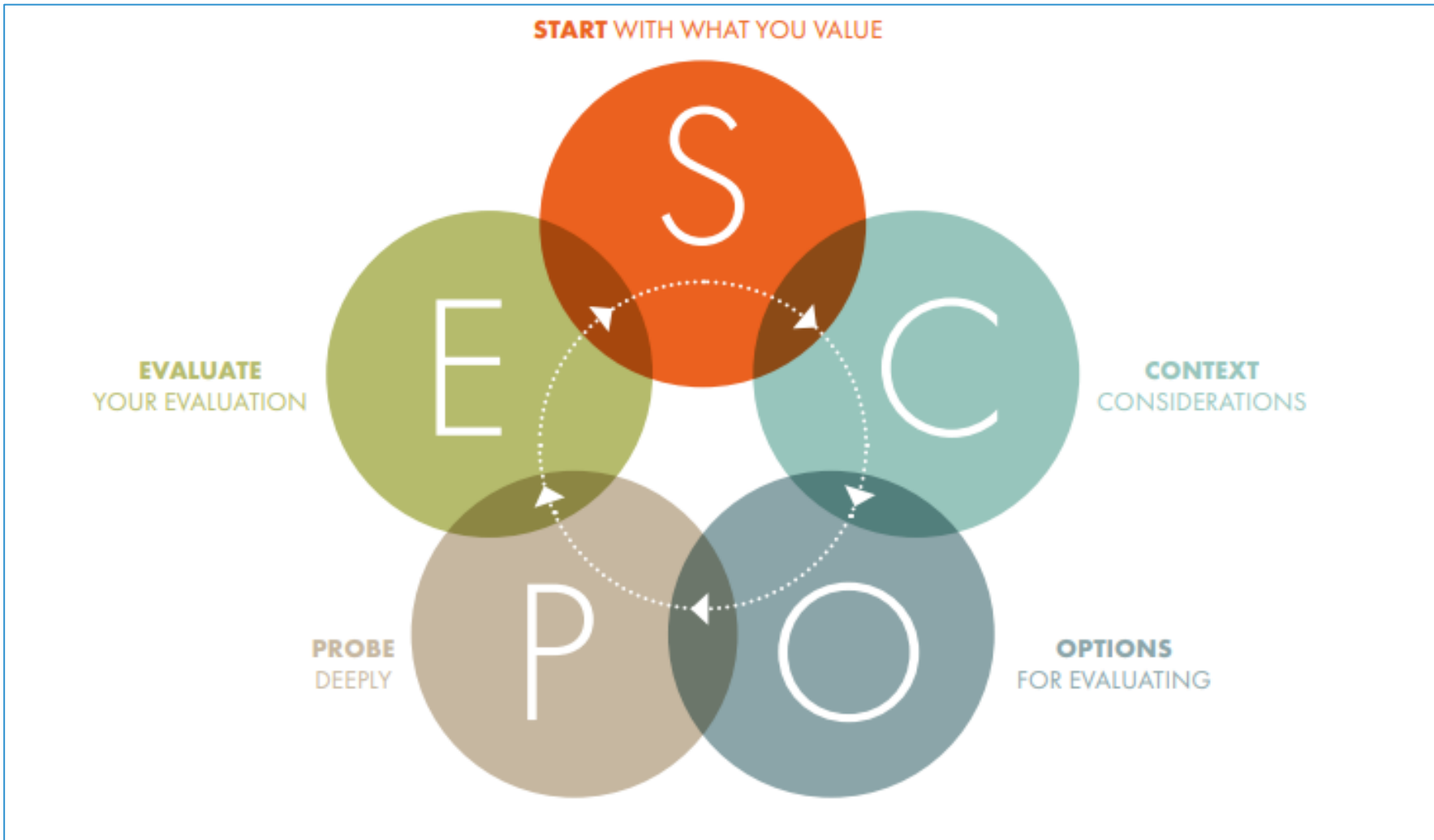
SCOPE Framework is practical step-by-step process

SCOPE Framework is a five-stage model for evaluating responsibly

- designed to help research managers, or anyone involved in conducting research evaluations, in planning new evaluations as well as checking existing evaluations.
- SCOPE is an acronym, where S stands for START with what you value, C for CONTEXT considerations, O for OPTIONS for evaluating, P for PROBE deeply, and E for EVALUATE your evaluation.

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International Network of Research Management Societies (INORMS) - Research Evaluation Group (2023). The SCOPE Framework. The University of Melbourne. Report. <https://doi.org/10.26188/21919527.v1>



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The SCOPE Principles

The five stages of SCOPE operate under three main principles:

1. Evaluate only where necessary.

Evaluation is not always the right strategy. When it comes to incentivising behaviours, for example, it may be more fruitful to enable them than to evaluate them.

2. Evaluate with the evaluated.

Any evaluation should be co-designed and co-interpreted by the communities being evaluated.

3. Draw on evaluation expertise.

We should apply the same rigour to our evaluations that we apply to our academic research.

START with what you value

- Clearly articulate what you value about the entity being evaluated
- Not with what others' value (external drivers)
- Not with available data sources (the 'Streetlight Effect')

CONTEXT considerations

- Ensure your evaluation is context-specific
- WHO are you evaluating? (Entity size and discipline)
- WHY are you evaluating?

OPTIONS for evaluating

- Consider both quantitative and qualitative options
- Be careful when using quantities to indicate qualities

PROBE deeply

- WHO might your evaluation approach discriminate against?
- HOW might your evaluation approach be gamed?
- WHAT might the unintended consequences be?
- CONSIDER the cost-benefit of the evaluation

EVALUATE your evaluation

- Did your evaluation achieve its aims?
- Was it formative as well as summative?
- Use SCOPE to evaluate your evaluation.

SCOPE+i Resources are aligned with SCOPE phases

SCOPE+i RESOURCES	S	C	O	P	E
T Assessment readiness template	●	●			
G Guide for overcoming common obstacles in implementing RRA			●	●	
G Guide on equity, diversity and inclusion (EDI)			●	●	
G Assessment team guidelines	●	●			
G Guide for evaluators and evaluands			●	●	
T Stakeholder mapping template	●	●			
T Value statement template	●				
T Purpose and context statement template		●			
G Guide on translating values, purpose and context into an assessment protocol			●	●	
G Indicator toolbox			●	●	
G OS assessment guide	●	●			
G Narrative CV template, OS aware guide			●	●	
G Guide on the diversity of OS contributions, roles and activities			●	●	
C Checklist for responsible assessments	●	●	●	●	●
G Guide for evaluating the evaluation					●
T Strategy self-evaluation template			●	●	

G = GUIDE **T** = TEMPLATE **C** = CHECKLIST

Contents of 16 SCOPE+i Resources

SCOPE+i Resources have guides, templates, checklist and toolbox about

- maturity and capacities, actors & stakeholders and values of a RRA process
- considerations for assessing open science
- reflection of RRA process

SCOPE+i Resources can be applied in all research assessment phases such as

- reflecting assessment readiness
- designing assessment
- performing assessment and
- evaluation&dissemination assessment

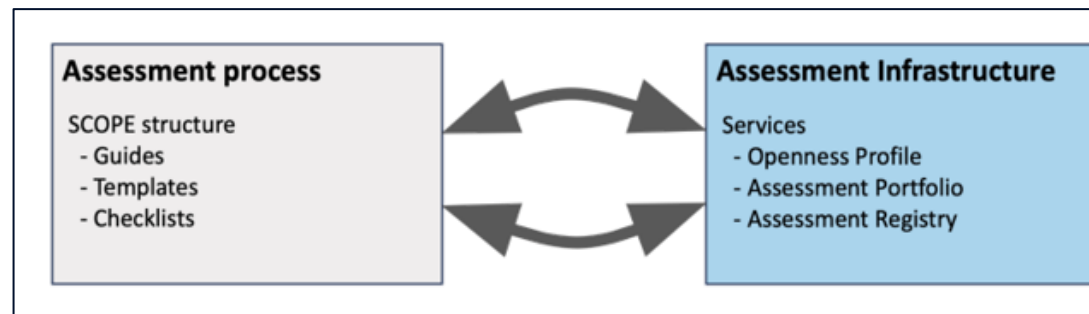
Where can you find SCOPE+i Resources?

Resources can be downloaded in [Zenodo community GraspOS Templates & Guidelines with CC0 license](#)

- CC0 enables reusers to distribute, remix, adapt, and build upon the material in any medium or format, with no conditions.

SCOPE+i Resources are integrated into [Assessment Portfolio](#) and [Assessment Registry](#) of the [GraspOS Infrastructure](#)

- The infrastructure has user friendly front-end UI for searching and browsing datasets, tools, SCOPE+i Resources and services.



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SCOPE+ i Resources in alphabetical order with permanent IDs

SCOPE+i Resource	DOI	Zenodo link
Assessment readiness template	10.5281/zenodo.15525577	https://doi.org/10.5281/zenodo.15525577
Assessment team guide	10.5281/zenodo.15525548	https://doi.org/10.5281/zenodo.15525548
Checklist for responsible research assessments	10.5281/zenodo.15524455	https://doi.org/10.5281/zenodo.15524455
Guide for evaluating the evaluation	10.5281/zenodo.15526189	https://doi.org/10.5281/zenodo.15526189
Guide for evaluators and evaluands	10.5281/zenodo.15526025	https://doi.org/10.5281/zenodo.15526025
Guide for overcoming common obstacles in implementing RRA	10.5281/zenodo.15526054	https://doi.org/10.5281/zenodo.15526054
Guide on equity, diversity and inclusion (EDI)	10.5281/zenodo.15526122	https://doi.org/10.5281/zenodo.15526122
Guide on the diversity of OS contributions, roles and activities	10.5281/zenodo.15526089	https://doi.org/10.5281/zenodo.15526089
Guide on translating values, purpose and context into an assessment protocol	10.5281/zenodo.15525721	https://doi.org/10.5281/zenodo.15525721
Indicator toolbox	10.5281/zenodo.15526168	https://doi.org/10.5281/zenodo.15526168
Narrative CV template	10.5281/zenodo.15525987	https://doi.org/10.5281/zenodo.15525987
Open Science assessment guide	10.5281/zenodo.15525630	https://doi.org/10.5281/zenodo.15525630
Purpose and context statement template	10.5281/zenodo.15525469	https://doi.org/10.5281/zenodo.15525469
Stakeholder mapping template	10.5281/zenodo.15525686	https://doi.org/10.5281/zenodo.15525686
Strategy self-evaluation template	10.5281/zenodo.15526008	https://doi.org/10.5281/zenodo.15526008
Value statement template	10.5281/zenodo.15524532	https://doi.org/10.5281/zenodo.15524532



Let's make it happen! Together.

THANK YOU



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