INSTITUTIONAL DATA EVALUATION AND ASSESSMENT (IDEA) MATURITY MODEL

	Initial	Emerging	Established	Optimizing
Cultural Norms & Expectations	Data are treated as byproducts rather than meaningful research outputs. There is little to no institutional awareness of, or value placed on, evaluating data contributions. Researchers are not expected to share data or demonstrate its impact, and there are no norms or practices for reporting reuse or citation.	Conversations about the importance of data as a scholarly asset are beginning. Institutional norms around reuse tracking and data evaluation are weak, with practices largely shaped by individual champions or external mandates. Some departments informally recognize data as a legitimate output, but expectations are largely compliance-driven and inconsistent.	There is growing recognition that data are valuable scholarly contributions, and that data sharing and reuse actively advance institutional goals and values. This awareness is reflected in the formalization of practices for documenting and evaluating data contributions in some departments and their integration into selected institutional workflows. Reporting on data sharing, citation, and reuse is becoming increasingly routine, but expectations to report are not yet consistent across the institution.	There is a shared understanding that data sharing and reuse are central to the institution's ability to achieve its goals and demonstrate leadership within the research community. Expectations for documenting and reporting these practices, including evidence of impact, are consistent across the institution, while specific practices are discipline-sensitive and co-developed with researchers. Data evaluation metrics are systematically applied to inform strategy, investment, and recognition, reinforcing data as a driver of both scholarly integrity and institutional excellence.
Policies & Processes	Institutional and department-level policies do not reference data sharing or reuse as scholarly contributions. There are no criteria, review guidelines, or workflows to document or recognize data contributions. As a result, data activities are not expected or considered in hiring, promotion, or performance evaluations, and no internal processes support their assessment.	Institutional policies acknowledge data contributions, but mainly in relation to compliance, ownership, or management responsibilities rather than as scholarly outputs. Processes for including data activities in review materials exist but are vague, often grouping them with other categories like public engagement or general research outputs. Recognition remains inconsistent and is largely dependent on the discretion of individual reviewers or departments.	Institutional policies explicitly identify data sharing, reuse, and impact as recognized scholarly contributions that advance both research integrity and institutional goals. Processes to document and evaluate data contributions are increasingly formalized, with guidelines that call for their inclusion in CVs, dossiers, and performance reviews. Expectations for reporting are becoming clearer, but application remains uneven across departments and disciplines.	Institutional policies require the reporting and evaluation of data contributions in hiring, promotion, and tenure processes, recognizing them as critical to advancing both scholarly excellence and institutional competitiveness. Processes for assessing data impact are well-defined, regularly updated, and supported by structured templates, examples, and training. Expectations for documenting and reporting data contributions are consistent and standardized across administrative workflows, ensuring they are fully embedded in institutional review and recognition systems.
Incentives & Rewards	Data contributions are not recognized as impactful scholarly outputs and are generally excluded from performance or promotion evaluations. No institutional incentives—monetary, reputational, or developmental—exist to support or encourage data sharing and impact reporting. When recognition of data contributions occurs, it is informal and not connected to institutional practices.	Data contributions receive occasional recognition, often driven by individual advocacy or specific funder requirements. Some departments provide limited incentives, such as acknowledgments in annual reviews, but these efforts are modest and fragmented. Recognition and rewards for data sharing are inconsistent and provide little motivation for researchers to prioritize these activities.	The institution and many departments formally recognize data sharing, reuse, and impact as scholarly contributions, recommending their inclusion in CVs, promotion materials, and internal reporting. Incentive programs, such as internal grants, seed funding, or awards for data-related work are in place, signaling institutional support for these activities. However, implementation and promotion of these incentives remains uneven, and recognition of data contributions is not yet consistently applied.	Data contributions and their impact are fully recognized as scholarly outputs and are consistently integrated into researcher evaluation frameworks alongside traditional measures. A comprehensive system of incentives — including funding, recognition programs, and advancement opportunities — supports and motivates data sharing and is routinely reviewed to ensure alignment with institutional goals. Recognition and rewards are applied transparently and consistently across the institution, and data contributions are regularly highlighted as markers of excellence and leadership in institutional reports and communications.
Infrastructure	Institutional systems and platforms operate in isolation, with no mechanisms to connect or coordinate data-sharing activities. Persistent identifiers (PIDs) are not consistently used to track people, datasets, or outputs, and no governance structures guide how data are managed or evaluated. Institutional tools or data sources for measuring data-sharing activities do not exist, and there is no staffing or technical support dedicated to these efforts.	Limited integration exists between select systems, enabling partial tracking of data sharing but leaving most information siloed. Some tools, such as PIDs, have been adopted, but their use is inconsistent and governance frameworks are minimal, often limited to compliance or department-level practices. Relevant data sources exist but remain difficult to access. Informal staff support is available, but roles are undefined and coordination across areas of the institution is lacking.	Institutional systems and workflows support regular tracking of data sharing and limited measurement of impact, though integration across departments remains incomplete. PIDs are routinely used to connect data contributions to people and projects, and governance frameworks are being developed to guide the use of tools and data sources more consistently. Dedicated staff or teams support evaluation activities, with defined roles in units like the library and research office. Coordination is growing but remains uneven across the institution.	Institutional systems are fully interoperable and aligned with external standards, enabling comprehensive tracking and evaluation of data sharing and reuse. PIDs and data evaluation tools are fully integrated into institutional workflows, supported by robust governance frameworks that ensure consistency, transparency, and adaptability. Support is coordinated, accessible, and embedded across research and administrative units, providing sustained expertise and continuity.
Capacity Building	There are no coordinated training or outreach efforts focused on evaluating or reporting data-sharing activities. Workforce development efforts are absent. While relevant expertise exists in some departments, it is not deployed to meet institutional data evaluation needs and researchers lack access to consultation or guidance to support these activities.	Limited evaluation-focused support and training exist in a few units, but awareness and reach are low. Workforce development is informal and ad hoc, without institution-wide coordination or integration into institutional priorities. A small number of experts provide consultation upon request, yet guidance on evaluating or reporting data-sharing activities is inconsistent and services are not promoted in a way that makes them easy to find or use.	Training and outreach opportunities related to evaluating data-sharing activities are broadly available and increasingly embedded in institutional offerings, though uptake varies across roles and departments. Workforce development is coordinated through programs in institutional units such as the library and research office, with growing alignment to institutional priorities. Experts provide defined consultation and support for evaluation, and cross-unit coordination is strengthening, even if coverage is not yet comprehensive.	Training on evaluating and reporting data-sharing activities is current, widely used, and tailored to diverse roles and disciplines. Workforce development is strategic, regularly assessed, and fully aligned with institutional goals, ensuring sustained growth of expertise. Experts collaborate across units to provide visible, accessible consultation and support, with content and guidance updated in response to feedback and emerging needs. Capacity-building efforts are integrated into research workflows, making evaluation support a standard part of the institutional research environment.
External Alignment & Engagement	There is little or no institutional awareness of external research assessment reform efforts, such as DORA, CoARA, HELIOS Open, or other initiatives aimed at broadening the recognition of scholarly contributions. Principles for evaluating diverse research outputs are absent from institutional policies and review practices, and there is no recognition of how such reforms could advance the institution's goals or priorities. The institution does not engage with or contribute to external reform communities.	Awareness of external research assessment reform efforts, such as DORA, CoARA, HELIOS Open, is beginning to take hold within the institution. References to these efforts may appear occasionally in meetings, reports, or policy discussions, but they are not yet reflected in formal guidance or evaluation practices. Engagement with external reform communities is limited and typically driven by individual champions or by activity within a handful of departments or disciplines, without clear connection to institutional goals or priorities.	The institution increasingly incorporates principles from external research assessment reform efforts into its policies and practices. Guidance documents and review criteria acknowledge the importance of recognizing diverse scholarly contributions, including data, with references to reform initiatives appearing across multiple units. These practices are understood not only as aligning with community standards but also as supporting the institution's own goals for transparency, integrity, and research excellence. Engagement with external reform communities is more coordinated, though uptake and application remain uneven across departments and disciplines.	The institution demonstrates a sustained commitment to research assessment reform by actively participating in and contributing to external initiatives such as DORA, CoARA, HELIOS Open and related communities. Principles for recognizing diverse scholarly contributions, including data, are fully embedded in institutional policies, communications, and evaluation frameworks, helping the institution pursue its goals of excellence, accountability, and competitiveness. The institution is recognized as a leader in these reform communities, contributing knowledge, tools, and models that shape broader practices and standards.