Guidance for CHARTED Flexible Fund Reviewers[1]

General information

This document provides guidance on reviewing and scoring applications to CHARTED's *Fund 1 - FAIRifying Training Resources* and *Fund 3 - Tools and Frameworks*. The purpose of Fund 1 is to support trainers and training providers in improving the FAIRness of their training resources. The maximum amount applicants can request per application in Fund 1 is £40k. The purpose of Fund 3 is to support the development of tools and frameworks that make the training landscape easier to navigate. Applications for two types of projects were accepted: small projects up to £15k and large projects up to £150k. In Round 1 applications to both Fund 1 and Fund 3 will be reviewed by the same set of reviewers.

The main steps of the review process are as follows:

1. Allocation of applications to reviewers.
2. Independent review and scoring of applications using the GoodGrants platform.
3. Online panel meeting of reviewers to discuss and rank applications.

If you have any questions or require assistance, please contact the CHARTED team on charted@drtp-skills.ac.uk.

Release of applications

Applications have been submitted through the GoodGrants platform. Once the applications have been checked by the CHARTED team, they will be assigned to reviewers with relevant expertise. Explicit conflicts of interests will be taken into account at this stage as well.

Agreeing to terms and conditions

The first time you try to access the applications you have been assigned, you will be asked to agree to some terms and conditions, including some on confidentiality and AI use.

Confidentiality

The content of applications, reviews (yours and others') and panel discussions must be kept strictly confidential. Please address all questions about the reviewing process to the CHARTED team only. Do not discuss the content of any part of the reviewing process (including scores and ranking order) with anyone outside the CHARTED team and the review panel. You must delete any copies of applications after the panel meeting.

[1] Based on instructions created for the Research Software Maintenance Fund (round 2) by the Institute for Research Software under a Creative Commons Attribution Non-Commercial 2.5 License.

Generative AI use

Any use of Generative AI / large language models (e.g. ChatGPT, CoPilot, Gemini, Claude, etc.), in the preparation of reviews or participation in the panel is strictly forbidden. Please note that this includes accessing these models through your institution.

Generative AI use is forbidden both because documents provided for review are confidential and must not be used as an input for generative models, and because we want *your* assessment of the application, not an AI model's assessment.

Conflicts of interest

Once you have confirmed that you agree with our terms regarding confidentiality and use of generative AI, you will be able to see the applications that have been assigned to you. **Please have a look through all applications and inform us of any conflicts of interest (CoI) by Friday 13 November 2026 by emailing the CHARTED team on charted@drtp-skills.ac.uk.**

You will be asked to review all applications you are not conflicted with. The panel chair will place you in a break-out room while those CoI applications are discussed.

We are following the UKRI's definition of what constitutes a conflict of interest:

> UKRI defines a conflict of interest as a situation where an individual's ability to exercise judgement or act in one role is, could be, or is seen to be impaired or otherwise influenced by their involvement in another role or relationship. Even a perception of competing interests, impaired judgement or undue influence may be damaging to UKRI's reputation.

Please consult the UKRI's Declaration of interests: guidance for assessors, reviewers and panellists page for further information.

Review process

There is a single review round. The full reviewing process is as follows:

1. The CHARTED team assigns reviewers to applications. This will be done taking into consideration the reviewers' affiliation to avoid obvious conflicts of interest.
2. Reviewers are asked to accept the CHARTED Terms and Conditions, including around confidentiality, data protection and Generative AI use.
3. Reviewers are given access to the applications and will have 5 days to report any additional conflicts of interest to the CHARTED team.
4. Reviewers review the applications that have been assigned to them and submit scores and comments on the GoodGrants platform by **Friday 4 December 2026.**
5. Reviewers meet online to discuss the applications and decide on final scores and ranking. The meeting will be scheduled for the morning on **Tuesday 8 December 2026.**

6. The CHARTED team makes final funding decisions and informs applicants of the outcomes.

Pre-panel reviews and scoring

Each reviewer reviews and scores applications assigned to them ahead of the panel. Scores and comments must be recorded on the GoodGrants platform.

Please follow these steps:

1. Register on the GoodGrants platform
2. Log in and select the “Review” tab on the upper left-hand side of the window.
3. You should now see the currently active review rounds. Applications for Fund 1 and Fund 3 were submitted through separate forms, therefore, they also have separate review forms. You should be able to see both CHARTED Fund 1 and CHARTED Fund 3 Full Scoring forms.
4. Select one of them to see a list of your assigned applications. Click through each of them and check if you have any conflicts of interest. If you do, report them to the CHARTED team, using the charted@drtp-skills.ac.uk email by Friday 13 November.
5. If you do not have conflict of interest, please provide a numeric score for each of the criteria and provide written feedback. Please remember this feedback will be visible to the applicants. If you wish to make a comment that should not be shared with the applicants (e.g. to be discussed during the panel meeting) make sure to mark it as internal feedback (a checkbox to mark a comment as internal appears once you begin to type in the review feedback box). Other reviewers will be able to see the internal comments as well.

All reviews must be completed and recorded on GoodGrants by Friday 4 December 2026.

Panel meeting

At the panel meeting, the applications will be discussed to produce a final score for each and create a ranked list. The order in which the applications are discussed will be set by the CHARTED team and shared in advance of the panel meeting. The order will be based on the pre-panel average of each application and the amount of money requested (more highly scored applications and ones requesting more money will be discussed first).

Due to the relatively small number of applications received, the panel will be chaired by a representative from the CHARTED team. For each application, the panel chair will facilitate a short discussion among all reviewers to produce a consensus, final score for that application. In case of any direct conflicts of interest another panel member may be asked to temporarily take over as a chair.

Any additional feedback for the applicants should also be collected at this point. *Panel members are asked not to introduce information that is not included in the application or materials directly linked from the application into the discussion.*

Once all applications have been individually discussed, the panel chair will return to the rank-ordered list to reflect on the ordering, recommend acceptance/rejection and discuss any remaining issues or uncertainties. When the recommendation lists are complete, the panel has completed its task. The panel will then be asked to provide any feedback on the review process.

Scoring an application and preparing feedback

The same three review categories are applied to both Fund 1 and Fund 3 applications. Each can be scored from 0 to 5, with 5 corresponding to a very strong application. If you identified any gaps or issues please make sure to mention them in your feedback. You can leave multiple comments. You can also mark them as internal feedback - i.e. to only make them visible to other reviewers and the CHARTED team.

Criteria

The main criteria are as follows:

- **Scope (0-5):**
  - Alignment with CHARTED and Fund 1 or Fund 3 goals.
- **Soundness (0-5)**:
  - Feasibility of the approach
  - Capability to deliver
- **Benefit to the community (0-5):**
  - Impact on supporting local and wider dRTP communities.

The more detailed description of each criterion is included below, along with an indication as to which application section is most likely to contain relevant information. However, if the criteria are addressed in other sections as well, please take those into consideration. We are primarily looking for your help in determining if the proposed projects are in-scope, deliverable and can have a positive impact on the dRTP ecosystem.

Although the scoring criteria are the same for all applications, Fund 1 and Fund 3 are focused on different aspects of the ecosystem. Please review the information below carefully to better understand what we are looking to fund through both Funds.

Fund 1 - FAIRifying Training Resources

The purpose of this fund is to support trainers and training providers in improving the FAIRness of their training resources. The total amount of funds available is £350k, spread across two application rounds. The maximum amount applicants can request is £40k and we expect to fund several applications in this round. If all applications are strong, we may fund all proposed projects. Therefore, instead of scoring the applications against each other, please focus on their merit and potential benefit - both local and community-wide.

Scope

This criterion should reflect the alignment with the Fund 1 goals and adherence to the FAIR principles. The applicants were encouraged to use the CHARTED's FAIR evaluation service

to scope their proposed work, but this was not a strict requirement. We are seeking to fund projects that are focused on at least one of the following:

- Improving FAIRness of the existing training resources - the proposals do not have to cover all aspects of Findability, Accessibility, Interoperability and Reusability. They can focus on specific elements only.
- Producing best practice documents for creating or improving FAIRness of training resources.
- Creating or expanding training materials that focus on FAIR principles for training resources.

More detailed examples are included in the “What we are looking for” section on the Fund 1 page at https://drtp-skills.ac.uk/funds-fair/.

The key information for this criterion should be included in section C (Project details) but other sections could provide useful details as well. Applications that are clearly in-scope and articulate the proposed work well should receive high scores for scope.

Soundness

This criterion should cover both the feasibility of the approach (primarily addressed in Section D - Cost and plans, including the attached documents) and the capability to deliver (primarily addressed in section B - Applicant Information). Questions to consider are: Is the proposed work feasible with the outlined effort in the specified time-frame? Does the project budget make sense? Please note that CHARTED is able to fund applications at 80% FEC. Do the applicants have the right expertise and enough institutional support to deliver the proposed work? Please have a look at the information provided across all sections and provide a single score for the application soundness.

Benefit to the community

This criterion should evaluate how useful the proposed work is - both for local dRTPs but also to the wider community of potential beneficiaries. Questions to consider are: Is the proposed work useful? Does it address a known gap or provide a novel solution? The proposals that have potential for higher impact should be scored higher.

Fund 3 - Tools and Frameworks

The purpose of this fund is to support the development and extension of tools, frameworks and approaches that improve the navigability of the dRTP training ecosystem. The total amount of funding available is £350k, spread across two application rounds. In each round we expect to fund one large (up to £150k) and several small projects (up to £15k) but this may vary depending on the range of applications. Please focus, primarily, on determining if the proposed projects are in-scope, feasible and of benefit to the dRTP community, rather than trying to rank them against each other.

The main criteria are the same as for Fund 1, but have a slightly different focus. Please take note of the size of each application - whether it is a large or small project - and score each

on its merit. Please do not judge applications for small projects against large projects, and vice-versa.

Scope

This criterion should reflect the alignment with the Fund 3 goals. The proposed projects may be focused on:

- Design, development or testing of new tools for self-assessment and diagnostics to help dRTPs identify what skills they may need to complete specific tasks, advance the skills they currently possess, or identify knowledge gaps.
- Development and improvement of frameworks, schemas, catalogues or other approaches that capture or improve the alignment between different dRTP roles and skills; link skills with training resources; or more generally improve the transparency and navigability of the dRTP skills ecosystem.
- Extension of existing tools or frameworks to make them useful for new communities within the dRTP landscape, or to include previously missing perspectives.
- Development and testing of new approaches to continuous professional development.
- Creation of best practice guides or other resources that contribute to a more transparent and easier to navigate training ecosystem.

The above-mentioned tools may have a narrower focus initially (e.g., specific domain, role, or skillset) but should have the potential for being extended to a wider dRTP ecosystem. More detailed examples are included in the “What we are looking for” section on the Fund 3 page at https://drtp-skills.ac.uk/funds-tools/.

The key information should be included in section C (Project details) but other sections could provide useful details as well. Applications that are clearly in-scope and articulate the proposed work well should receive high scores for scope.

Soundness

This criterion should cover both the feasibility of the approach (primarily addressed in Section D - Cost and plans, including the attached documents) and the capability to deliver (primarily addressed in section B - Applicant Information). Is the proposed work feasible with the outlined effort in the specified time-frame? Does the project budget make sense? Please note that CHARTED is able to fund applications at 80% FEC Do the applicants have the right expertise and enough institutional support to deliver the proposed work? Please have a look at the information provided across all sections and provide a single score for the application soundness. **Please note this may be very different for large and small projects allowed in Fund 3.**

Benefit to the community

This criterion should evaluate how useful the proposed work is for both local dRTPs but also to the whole community. This information should primarily be included in section E - Supporting information. The applications for large projects are especially expected to have a community-wide impact.

Questions

If you have any questions about the information included in this guide or encounter any issues with reviewing the applications, please get in touch with the CHARTED team at charted@drtp-skills.ac.uk,