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RE-IMAGINE Transferability Guide

Adapting the Ethics-in-Practice Framework and Toolbox to local higher education contexts

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1.



PURPOSE AND SCOPE

This Guide helps educators, students, researchers and institutional actors adapt the RE-IMAGINE approach to a new course, discipline, research workflow, organisational unit or institution. Its purpose is to help users make local adaptation choices while maintaining the connection between ethical reflection, responsibilities and practice.

How the Three Resources Work Together

Resource	Role
Ethics-in-Practice Framework	Provides the conceptual and methodological approach, ORRI Translation Map and Decision-Making Cycle.
Ethics-in-Practice Toolbox	Provides practical instruments and stakeholder-specific guidance, including actions to take after using the instruments.
Transferability Guide	Supports local mapping, selection, adaptation and review of the approach in a new setting.

Read the relevant Framework sections and selected Toolbox instruments alongside this Guide. For instructions on checking outputs, completing declarations or acting on instrument findings, refer to the Toolbox, particularly Chapter 9, "What to Do After Using the Instruments." Here, the focus is on identifying what needs to change when those resources are introduced into a different setting.

Basis for the Guidance

Development was informed by structured external feedback organised around relevance, adaptability and applicability. Open-ended responses were reviewed in relation to these dimensions to identify local adaptation needs and practical conditions for use. Comments on the overall assessment provided additional considerations. The guidance translates those considerations into adaptation prompts and suggested records.

Dimension	Local Adaptation Question
Relevance	Which local need does the approach address, and for whom?
Adaptability	What should change locally while retaining the core approach?
Applicability	Can the adapted instruments fit the actual workflow and available support?

These questions support planning and review; they do not establish demonstrated transfer.

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MAP THE APPROACH TO THE LOCAL SETTING

Choose a specific setting for the first adaptation. Avoid an institution-wide redesign when the immediate need concerns one course, research team or service. Describe the existing workflow before adding an instrument.

Prepare a Local Context Map

What to Establish	What to Record
Need and scope	The activity or workflow, intended users and the gap that the RE-IMAGINE resources should help address.
Existing practice	Current instructions, forms, review points and sources of advice that already serve a related purpose.
Responsibilities	Local role names, decision authority, reviewer and contact for unresolved questions.
Conditions of use	Language, disciplinary conventions, AI experience, time, accessibility and available tools or support.
Placement	Where the selected instrument will enter the workflow, and where its output will go.

Identify the Gap Before Adapting

If an existing process already meets the need, consider incorporating relevant prompts into it rather than creating a separate form. If responsibilities are unclear, identify the relevant local role before presenting the instrument to users. If there is no specialised AI role, establish which existing teaching, research or support function can offer guidance within its remit.

Retain the Framework Connection

Use Framework Section 4.3 and Annex 1 for the ORRI Translation Map, and Section 5.2 for the Ethics-in-Practice Decision-Making Cycle. Check that the local workflow still supports context identification, stakeholder involvement and responsibility, ORRI-guided reflection, risk identification, responsible decision-making, documentation and review. These functions may be distributed across existing records; they need not appear in one new form.

The ORRI Translation Map links the four operational principles to ethical objectives, stakeholder practices and indicators. Use it to check that local adaptations preserve these connections.

Principle	Practical Question
Openness	Is AI use transparent, explainable and appropriately communicated?
Responsibility	Who is accountable for the use, outputs and consequences of AI?
Reflexivity	Are risks, limitations, assumptions and unintended effects critically examined?
Inclusiveness	Are access, fairness, diversity and different user needs considered?

The ORRI Translation Map links the four operational principles to ethical objectives, stakeholder practices and indicators. Use it to check that a local adaptation retains this connection. Its indicators support reflection and review rather than fixed performance measurement. See Framework Section 4.3 and Annex 1, and Section 5.2 for the decision-making cycle.

Define the Boundary of the Adaptation

State whether the adaptation is for personal use, a course, a team or a wider institutional process. Identify any local approval needed for that scope. A change accepted within one course should not be presented as an institution-wide requirement without the relevant authority.

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SELECT AND ADAPT THE RELEVANT INSTRUMENTS

Use the Toolbox overview to select instruments by purpose. The entry points below support local selection; the instructions for each instrument remain in the Toolbox.

Local Need	Toolbox Entry Point
Review tool suitability	3.1 Digital & AI Tool Evaluation Sheet
Adapt teaching or assessment practice	4.1 Teaching Materials Design and Inclusive Learning Guide; 4.2 Assessment Guide; 4.3 AI Use Disclosure Template
Clarify student use and transparency	5.1 Responsible AI Use – Student Guide; 5.2 AI Output Evaluation Checklist; 5.3 AI Use Declaration Template
Align AI-assisted research with local requirements	6.1 Researcher AI Use and Data Protection Checklist; 6.2 AI Use Statement Template
Connect AI use to institutional procedures	7.1 Institutional AI Governance and Data Protection Checklist; 7.2 AI Adoption Decision Guide

Adapt Operational Details Deliberately

Translate terms, add local examples, identify responsible roles, insert procedural references and choose a workable format. Keep the instrument's purpose and relevant decision or documentation fields. Preserve the distinction between a review instrument and a template that records AI assistance; local submission arrangements should not imply that a declaration grants permission.

When integrating prompts into an existing form, note which RE-IMAGINE instrument supplied them and where the remaining functions are addressed. Do not remove a substantive ethical question solely because it is difficult to answer. Clarify it, locate the relevant information or identify a support contact.

Match the Level of Support to the Setting

Where AI experience is limited, provide a brief explanation of purpose and one locally relevant example. Where practices are established, focus on gaps or inconsistent responsibilities across workflows. Adjust the introduction to actual user needs rather than assuming that technical infrastructure indicates ethical readiness.

Keep a Short Adaptation Record

Record the original instrument and version, intended setting, changes and reasons, local owner, unresolved questions and review date. Keep the original available. Label translated or modified versions as local adaptations so future users can trace the source and understand the scope.

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ADAPT FOR DIFFERENT STAKEHOLDER GROUPS

The table identifies local details to settle before introducing the instruments. It complements the Toolbox's instructions on what users do after using them.

Group	Local Details to Settle
Educators	Course outcomes and disciplinary examples; assessment requirements; learner access needs; where disclosure is shared; the contact for concerns beyond the educator's remit.
Students	Assignment-specific permitted assistance; language and explanations; when and where the declaration is submitted; the educator or contact for unclear requirements.
Researchers	Research stage and data types; existing ethics and data handling workflows; disclosure requirements; relevant permissions; the research or specialist support contact.
Institutional actors	Responsible units and approval authority; links to existing governance and support processes; available resources; pilot scope; ownership of monitoring and review.

Keep Expectations Consistent Across Roles

Check connected adaptations together. An educator's assignment instructions should match the student declaration and explanation of permitted AI assistance. A research team's reporting arrangements should match the project workflow and applicable publication requirements. An institutional review should identify the authorised decision-maker rather than assigning approval to whoever completes a checklist.

Illustrative Local Adaptations

A language course retains the student declaration's purpose but translates explanatory text, adds examples of permitted language assistance and specifies the submission point. A research team connects relevant checklist prompts to its existing data management review and identifies the local support contact. An institution links governance recommendations to its existing action-tracking process, with named units and deadlines.

These are suggested adaptation options, not reports of completed applications. In each case, retain the source instrument and record the local changes. Instructions for verifying content, resolving concerns and documenting decisions are provided in the Toolbox and its chapter titled "What to Do After Using the Instruments."

Make Consultation Routes Usable

Replace generic references such as "relevant institutional role" with a local role or service where possible. Explain how users contact it and what information they should provide. If no route is available, resolve that gap before introducing an adaptation that depends on consultation.

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REVIEW THE ADAPTATION AND PLAN CONTINUED USE

Framework Section 8 describes institutional adoption. This section supports the narrower task of checking whether a local adaptation is understandable and workable before extending it to other settings.

Try It in a Bounded Setting

Choose one course activity, research workflow or service process, ensuring that any normally required approvals are in place. Define the users, purpose, duration and person responsible for collecting feedback. Explain which aspects of the local adaptation are being reviewed. Where consequential AI use is proposed, establish required safeguards before trying the affected activity.

Review Against the Three Dimensions

Dimension	Review Prompt	Possible Refinement
Relevance	Does it address the intended local need and the people affected?	Adjust the scope, example or instrument selection.
Adaptability	Are local terms and roles clear while the core ethical functions remain identifiable?	Revise wording, role references or connections to existing procedures.
Applicability	Can users fit it into the workflow, understand its outputs and access needed support?	Change placement, format, explanation or consultation arrangements.

Collect feedback on unclear terms, time required, duplicated records, missing contacts and questions that users could not resolve. Check whether the adaptation retained its intended purpose. Review the quality of the process rather than treating form completion or satisfaction alone as evidence that the AI use is appropriate.

Record the Review and Decide on Next Steps

Keep the adaptation version, setting, feedback, changes agreed, responsible person and next review point. Decide whether to continue in the same setting, revise and try again, extend to a similar setting or discontinue the adaptation. Wider use may require approval and support beyond the original activity.

Maintain Continuity

Assign an owner for keeping terminology, procedural references and contacts current. Review the adaptation when the purpose, tool, data or local requirements change. Share lessons with relevant colleagues where useful, without transferring confidential activity records unnecessarily.

If wider integration is appropriate, connect the adaptation to existing training, course design, research support, quality assurance or governance arrangements. Retain its stated scope and version history. A local adaptation may remain useful within a single activity without becoming an institutional policy.

Companion resources: RE-IMAGINE Ethics-in-Practice Framework; RE-IMAGINE Ethics-in-Practice Toolbox.