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Background

This Guide supports the transformation of CAETS publication policies and practices to better match the changing communications environment, positioning CAETS to achieve greater impact through its publications. It does not replace our publication tradition but rather builds upon it to ensure that the knowledge contained in CAETS reports reaches the diverse audiences that can understand, apply, and act upon it—and that its value extends well beyond the release of a single report.

The Guide's content is drawn from Knowledge, Communications, & Digital Engagement: *An Integrated Knowledge Ecosystem*, Council and Board approved (*17 September 2026*) two-part document designed to support CAETS' transformation. Part I—Strategy, establishes the strategic foundation; Part II describes the standards and implementation guidance needed to put the Strategy into practice. This Guide operationalizes that implementation. The strategic approach is governed by the four Core Principles shown below.

Core Principles of Strategy	
Audience First	Identify at the outset who is expected to use the knowledge, for what purpose, and in what form it will be most useful. Design publications with that intended audience in mind.
Create Knowledge Once. Create Impact Repeatedly.	Rigorously create foundational knowledge once, then deliberately adapt and extend that work to reach different audiences, support different applications, and continue to generate impact over time.
Technical Integrity & Knowledge Traceability	Maintain technical integrity and knowledge traceability between the foundational knowledge base and its subsequent adaptations.
Adaptive Evolution	Continue to adapt and evolve implementation processes and guidance to leverage new tools and new communications channels.

The approach is anchored by our Bylaws[1], which imply audiences of importance for CAETS' communications.

Audience	Related CAETS Objective
Member Academies	Foster collaboration and the development of bi-and multi-lateral programs between member academies.
Policy-Makers	Prepare science-based proposals in order to advise governments and international organizations on policy issues related to engineering and technology development.
Practicing Engineers	Contribute to advancing engineering and technological sciences in order to promote economic growth, sustainable development, and societal well-being throughout the world.
Educators	Contribute to continuous improvement and modernization of engineering education and practice internationally.
General Public	Foster a balanced public understanding of the applications of engineering and technology.
Multiple	Promote ethics in engineering, research and practice. Promote diversity and inclusion in the global engineering profession.

[1] CAETS Bylaws. CAETS Bylaws – International Council of Academies of Engineering and Technological Sciences.

About This Guide

This Guide supports creation and dissemination of the Knowledge Portfolios that are key to the CAETS Integrated Knowledge Ecosystem shown in Figure 1.

Key Definitions:

- **Foundational Publication:** The authoritative technical base of a Knowledge Portfolio, developed and reviewed through CAETS processes.
- **Companion Deliverable:** An audience-specific expression of knowledge derived from and traceable to the Foundational Publication.
- **Knowledge Amplification:** The deliberate adaptation and extension of authoritative knowledge to create repeated opportunities for impact.
- **Knowledge Portfolio:** A Foundational Publication together with its related Companion Deliverables.
- **Knowledge Platform**: The digital enabler of the Knowledge Ecosystem that connects Foundational Publications, Companion Deliverables, and the metadata needed to make CAETS' work discoverable, accessible, and reusable.

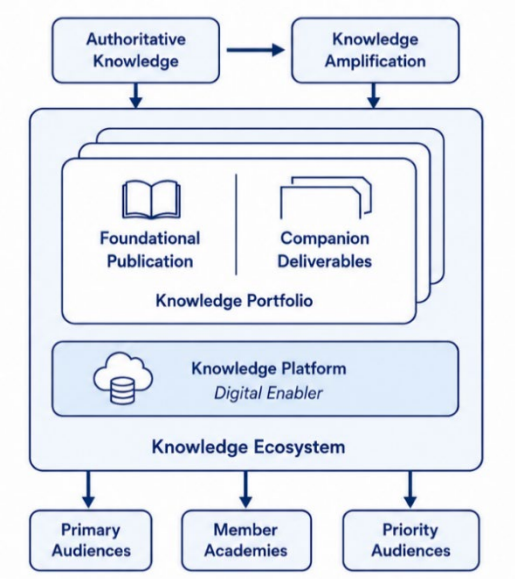


Figure 1. Integrated Knowledge Ecosystem

- **Primary Audience:** The audience for whom the Foundational Publication is principally developed.
- **Priority Audience:** Additional audiences CAETS deliberately seeks to reach through Knowledge Amplification.
- **Knowledge Initiative:** The *lifecycle process* through which CAETS moves from identification of a Global Challenge through creation, amplification, application, and ongoing management of authoritative knowledge to achieve Global Impact.

A Knowledge Initiative identifies a Global Challenge; builds an authoritative technical knowledge base regarding potential solutions; creates a Foundational Publication for dissemination; and, where appropriate, adapts and amplifies that technical knowledge base to create Companion Deliverables for publication. Publications are distributed directly to their intended audiences in addition to being made available for discovery via the Knowledge Platform—supporting application, action, and ultimately, Global Impact.

This Guide provides the implementation framework for a Knowledge Initiative. It also provides Reference materials that describe alternative publication structures and types, how to apply CAETS Publication Standards, and other specialized guidance. Finally, it provides downloadable tools and resources including worksheets, forms and checklists to support implementation.

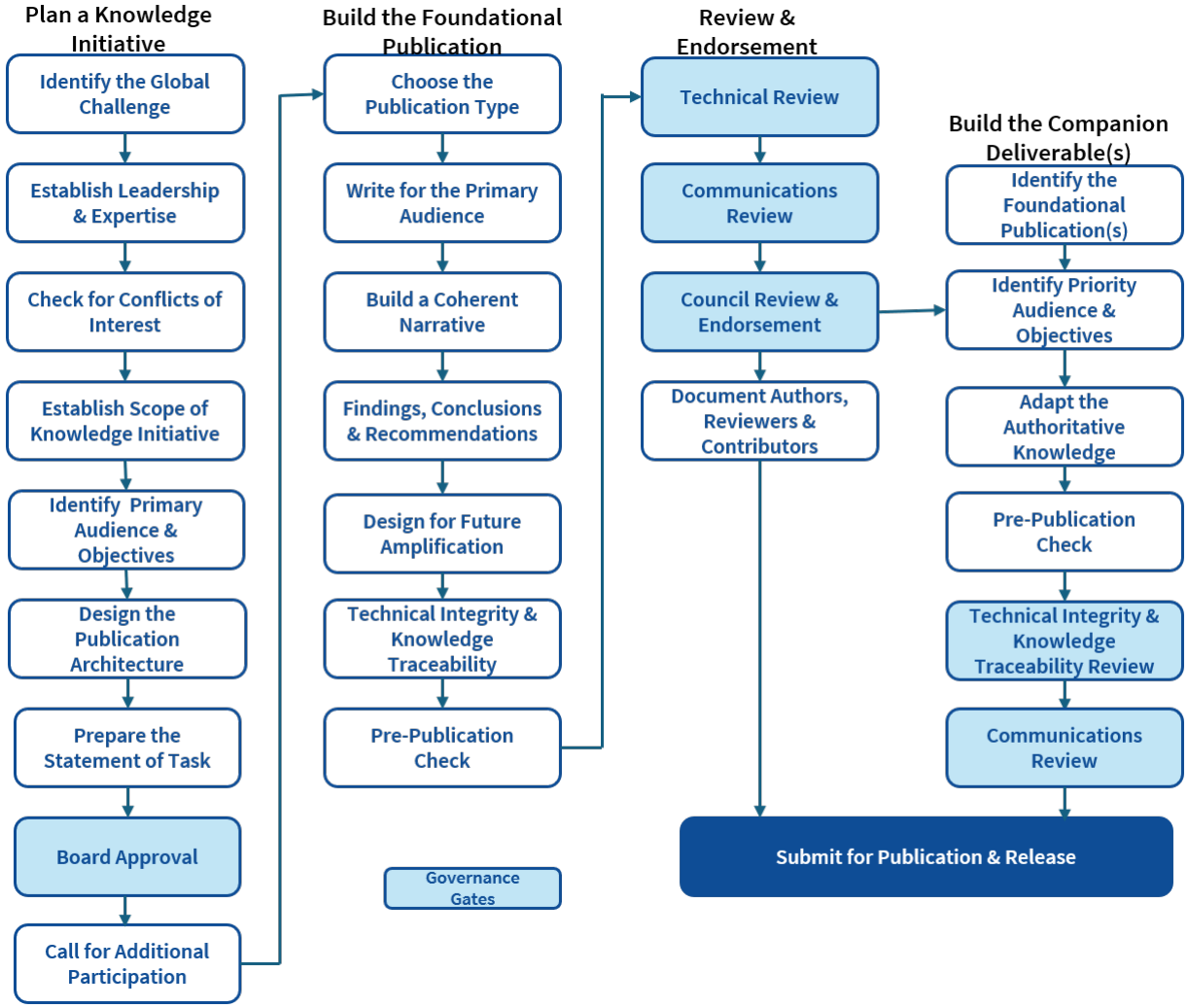
Primary users of this guide include Working Group Members, Publication Leads, and other individuals who undertake development of a Companion Deliverable as well as individuals who participate in review of a Foundational Publication or Companion Deliverable. Key roles and accountabilities are shown in the table that follows.

Other users include host academies and those responsible for developing CAETS Statements or other public communications.

Role	Principal Accountabilities
Working Group Chair	Provides overall leadership for a Knowledge Initiative; maintains alignment with its approved Statement of Task; ensures that the required expertise is engaged; ensures that conflict-of-interest disclosures are obtained, reviewed, and updated as appropriate; maintains coherence where an initiative includes multiple Foundational Publications or related activities; and retains appropriate technical-integrity oversight of work arising from the initiative. (*May also be the Publication Lead*.)
Publication Lead	Leads development of a Foundational Publication and/or Companion Deliverable; follows applicable CAETS Publication Standards, guidance, and review requirements; and is accountable for the coherence and quality of the work. For a Foundational Publication, the Publication Lead is also accountable for technical integrity and for ensuring that substantive technical review comments are appropriately considered and resolved. For a Companion Deliverable, the Publication Lead is responsible for maintaining technical integrity and knowledge traceability to the Foundational Publication.
Communications Committee	Provides and/or coordinates the communications review; advises on audiences, messages, formats, and communications channels; may identify or support opportunities to amplify CAETS knowledge; supports ongoing evolution of the Publication Standards.
Secretariat	Provides institutional continuity and support across planning, review, endorsement, publication, and ongoing management; maintains publication records and metadata; obtains and maintains DOIs; and coordinates 5-year review for currency of Knowledge Portfolios; supports ongoing evolution of the Knowledge Ecosystem.
Board	Oversees implementation of the Strategy; approves the standards and policies through which it is implemented; and approves the Statement of Task for individual initiatives.
Council	Endorses Foundational Publications in accordance with CAETS governance requirements, establishing them as authoritative knowledge and authorizing their subsequent amplification through Companion Deliverables under the conditions established in these standards.

Navigating This Guide: *Roadmap and Resources*

The roadmap below portrays the Knowledge Initiative lifecycle and links to sections in this Guide.



Downloadable Resources

References	*Foundational Publication*	*Companion Deliverable*
A. Cover and Publication Pages	-Publication Standards Checklist	-Companion Deliverable Planning
B. Controlled Publication Record	-Technical Report Template	-Technical Integrity & Knowledge Traceability Review
C. Publication Structures	-White Paper Template	-Technical Integrity & Knowledge Traceability Review & Disposition
D. Publication Standards	-Position Paper Template	-Communications Review Disposition*
E. ISO 690 Quick Reference Guide	-Policy Paper Template	***Publication & Release***
Planning a Knowledge Initiative	-Policy Brief Template	-Publication Release Checklist
-Foundational Publication Checklist	-Technical Review Form	-Publication Page Template
-Conflict of Interest Disclosure/Disposition	-Technical Review Disposition	-Controlled Publication Record Template
-Audience Planning Form	-Communications Review Disposition*	**Portfolio Evolution & Management**
-Statement of Task Template	-Member Academy Review	**-5-year Currency Review Template**
	-Member Review Disposition	**-Guide-User Feedback Form**
	-Visual Identity Assets	

*Review based on Publication Standards

1. Planning a Knowledge Initiative

1.1 Identify the Global Challenge

The planning process begins with identification and refinement of a global challenge and identification of specific areas in which CAETS is positioned to contribute towards solutions. The challenge should be defined in terms of scale and urgency; global and local impact; and key drivers and root causes. This may be accomplished by a core group of individuals who represent interested member academies.

1.2 Establish Leadership and Expertise

Having identified the basis for the initiative, the next step is to assemble the technical expertise required to address the challenge. This includes identification of the Working Group Chair, the Publication Lead (which may be the Working Group Chair), and preliminary Working Group Membership, subject to augmentation via an invitation to all member academies to designate representatives based on an approved Statement of Task.

1.3 Check for Conflicts of Interest

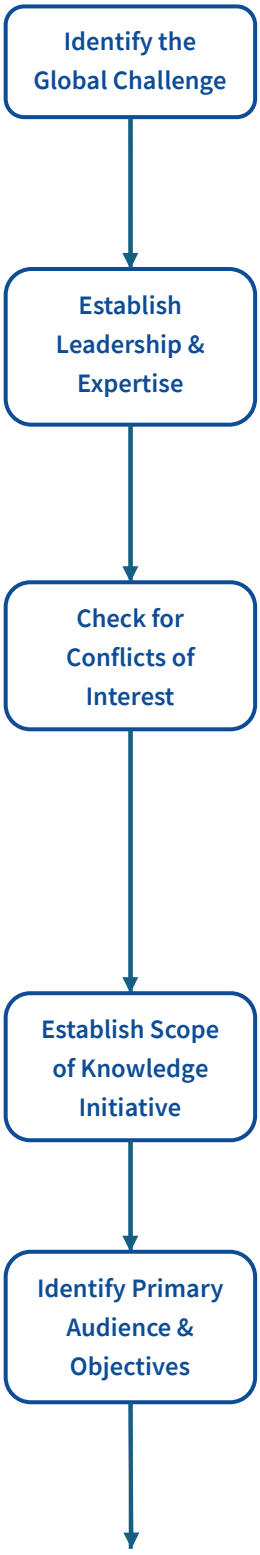
A Conflict of Interest occurs when an individual's personal, financial, or other private interests could influence, or appear to influence, their professional judgement or decisions. Each member of the Working Group must complete a disclosure form, which is submitted to the Working Group Chair via their respective member academy. The Working Group will discuss the disclosures and related information and agree on disposition, which must be documented for retention by the Secretariat. The disclosure, disposition, and documentation process must continue throughout the initiative as new members are added and/or new conflicts arise. The Working Group Chair is accountable for overseeing this process.

1.4 Establish Scope of Knowledge Initiative

Based on the global challenge identified, and the assembled technical expertise, refinement of the challenge may be necessary to clearly define the scope of the Knowledge Initiative. The scope must define its purpose, boundaries, and focus areas to ensure that CAETS is positioned to contribute. The purpose should identify *why*—the fundamental reason for establishing the Knowledge Initiative.

1.5 Identify Primary Audience and Objectives

These are the individuals expected to understand, use, apply, or act upon the content of the Foundational Publication. The identified Primary Audience must be specific enough to guide the tone of the narrative. Additional Priority Audiences may also be identified at this stage; these audiences are also interested in the content but would benefit from a different tone, a more accessible format (e.g. different level of detail, emphasis, or form of communication). Potential Companion Deliverables may be identified at this stage, but the initial planning need not anticipate every future opportunity. For each Primary and Priority Audience, objectives should be established to describe *how* the identified audiences will use the knowledge—the desired outcomes from its creation.



1.6 Design the Publication Architecture

The Working Group must determine how its authoritative knowledge can most effectively be organized, developed, reviewed, and used. An initiative may result in a single Foundational Publication or a coordinated family of Foundational Publications, each addressing a distinct sector, region, technology, or other dimension of a common global challenge (shown in Figure 2).

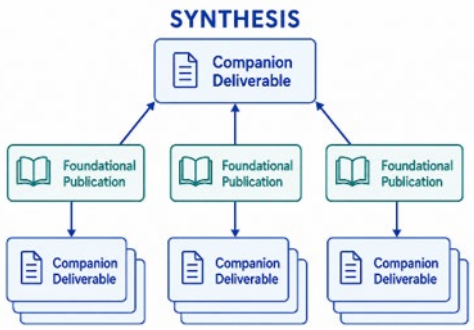


Figure 2. Synthesis of Family of Publications

A family approach could allow individual publications to proceed on timelines appropriate to their readiness and make individual elements easier to update or replace as circumstances change. A synthesis Companion Deliverable could subsequently integrate cross-cutting findings, conclusions, or recommendations *derived from* and *traceable to* the authoritative knowledge in the family of Foundational Publications.

This flexibility allows authoritative knowledge to reach audiences earlier, support more focused use and amplification, and enable individual components to be updated as circumstances change without requiring reconsideration of an otherwise current body of work. If a family of Foundational Publications is planned, each must have its own Statement of Task.

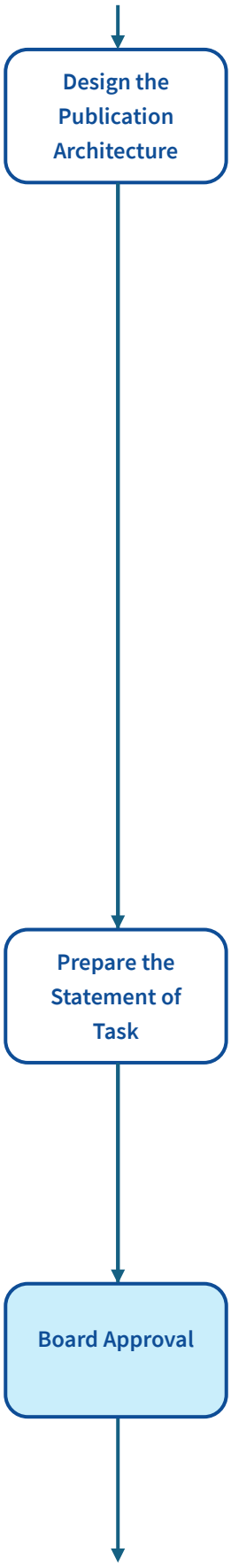
Potential Companion Deliverables for each Foundational Publication may also be considered at this stage.

1.7 Prepare the Statement of Task

The Statement of Task defines the scope and objectives of the Knowledge Initiative and establishes the basis for Board approval. It must identify the challenge being addressed, the intended Primary Audience, and the proposed publication architecture, including the anticipated Foundational Publication and, where appropriate, potential Priority Audiences and Companion Deliverables. Documentation of the conflict-of-interest review must accompany the Statement of Task when it is submitted to the Board. The approved Statement of Task provides the reference point for subsequent knowledge development.

2. Board Approval—*Governance Gate*

The Statement of Task, together with documentation of the resolution of conflicts of interest, is submitted to the Secretariat for Board Review when the initiative has been developed sufficiently to permit meaningful consideration of its purpose, scope, audiences, publication architecture, leadership, and proposed approach. The Secretariat coordinates Board review, which may occur during a meeting of the Board or via an electronic channel (e.g. email or an online ballot form).



Board approval authorizes the initiative to proceed within the terms of the Statement of Task without freezing the project design or requiring Board review of routine execution decisions.

After approving the Statement of Task, the Secretariat distributes it to all member academies and invites them to nominate representatives, particularly individuals with expertise not adequately represented in the preliminary membership. Individuals added at this stage will are required to complete and submit a Conflict of Interest Disclosure Form for review and disposition.

Call for additional participation

3. Build the Foundational Publication

3.1 Choose the Publication Type

CAETS knowledge will be published in several forms, selected to reflect the purpose, audience, and nature of the work. The publication types and typical lengths below provide a common framework for planning and publication while allowing sufficient flexibility to meet the needs of individual initiatives.

Choose the Publication Type

Publication Type	Principal Purpose	Characteristics	Typical Pages
Technical Report	Provide authoritative technical analysis and synthesis of a complex issue	Evidence-rich; technically substantive; may address multiple dimensions; may include detailed supporting material and appendices	20–100
White Paper	Examine an emerging or strategically important issue and develop an informed CAETS perspective	Focused analysis and synthesis; may frame an issue, identify implications, and establish directions	10–40
Position Paper	Establish and explain a CAETS position on a defined issue	Focused argument supported by evidence and analysis; clearly states the position and rationale	5–15
Policy Paper	Analyze a policy issue in sufficient depth to support policy consideration or action	Integrates technical evidence with policy context and implications	10–25
Policy Brief	Provide concise, actionable knowledge for policymakers or other decision-makers	Distills relevant evidence, implications, and recommendations	2–6
Article	Explain or interpret CAETS knowledge for a defined audience in an accessible narrative form	Focused narrative adapted to the intended audience	2–6

The typical page lengths shown in the table are guidelines drawn from a variety of sources. In practice, there are no agreed upon limits, although some potential audiences (e.g. governmental institutions) may have prescribed formats and page limits. **Foundational Publications should be as long as necessary to establish their authoritative basis and as short as possible to communicate it effectively.**

Frequently used Publication Types for a Foundational Publication are Technical Reports and White Papers; substantive Position Papers and Policy Papers could also provide an authoritative knowledge base. Policy Briefs and Articles are most likely to be used as Companion Deliverables. Selection of the specific type for a given Foundational Publication will be based on the Primary Audience and objectives as defined in the approved Statement of Task. Length should follow purpose and content.

3.1.1 Consider Companion Deliverables

Companion Deliverables may substantially adapt language, organization, and emphasis to communicate clearly with Priority Audiences. Many of the Publication Types listed above could also be used for Companion Deliverables; however, additional options, including those shown below, may better suit the audience and communication objectives.

Additional Types for Companion Deliverables	Typical Purpose and Use
Infographic	Communicates key findings, relationships, processes, or quantitative information visually
Video	Presents or explains key knowledge for digital engagement, education, public communication, or other audiences
Presentation	Organizes authoritative knowledge for briefings, meetings, conferences, education, or stakeholder engagement
Digital or Interactive Content	Enables audiences to explore or engage with CAETS knowledge through formats that may evolve with technology and user needs

Consideration of likely Companion Deliverable formats at this stage is beneficial, as it may influence the structure of the Foundational Publication.

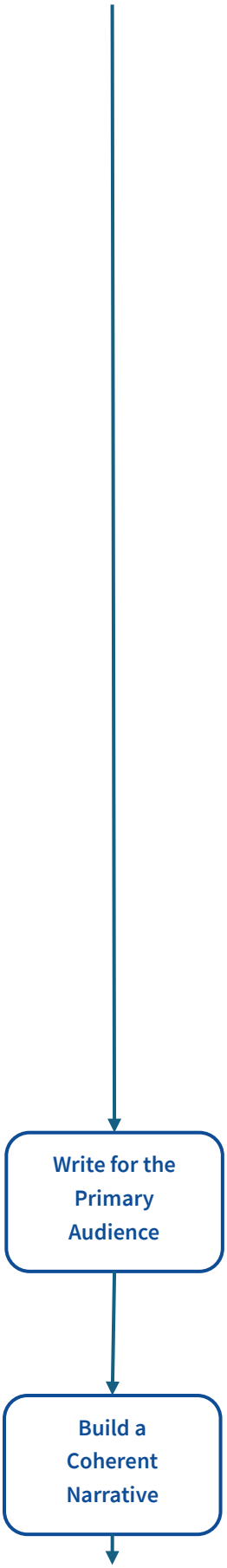
3.2 Write for the Primary Audience

A Foundational Publication is written for the Primary Audience identified during planning. Technical depth, terminology, structure, explanation, and presentation must reflect what that audience needs to understand and use the work.

Language, tone, and technical complexity must be appropriate to the Primary Audience and purpose of the publication. CAETS publications should be authoritative and evidence-based without being unnecessarily academic, technical, or formal.

3.3 Build a Coherent Narrative

A Foundational Publication should be organized around the questions it is intended to answer rather than around the organizational structure of the Working Group or the



sequence in which individual sections were developed. Sections and chapters should contribute to the coherence, with relationships among topics made explicit and unnecessary duplication removed. Figures, graphics, tables, and other visual elements should be used where they will clarify complex information, reinforce the narrative, or make important relationships and findings more readily understood.

3.4 Findings, Conclusions, & Recommendations

Findings are objective, evidence-based results identified during the work. Conclusions are judgments drawn from those findings; they synthesize the evidence, explain its meaning in context, and provide answers or insights. Recommendations are actionable outcomes based on the conclusions. They should be used selectively, supported by the analysis, and directed to the Primary Audience or another clearly identified decision-maker able to act on them.

3.5 Design for Future Amplification

The Foundational Publication should be developed as the authoritative foundation for subsequent use and amplification. Clear structure, concise statements of key findings, reusable graphics, consistent terminology, and well-organized source material will facilitate development of Companion Deliverables and future adaptation.

3.6 Technical Integrity & Knowledge Traceability

The Foundational Publication establishes the authoritative knowledge base from which Companion Deliverables are developed. Its findings, conclusions, recommendations, evidence, and other substantive content should therefore be structured so subsequent adaptations can be traced to and remain technically faithful to the authoritative source.

3.7 Pre-Publication Check

Before final review and endorsement begin, the Working Group will conduct an end-to-end pre-publication check to confirm that the document is complete, internally consistent, and ready for review. This check will verify that:

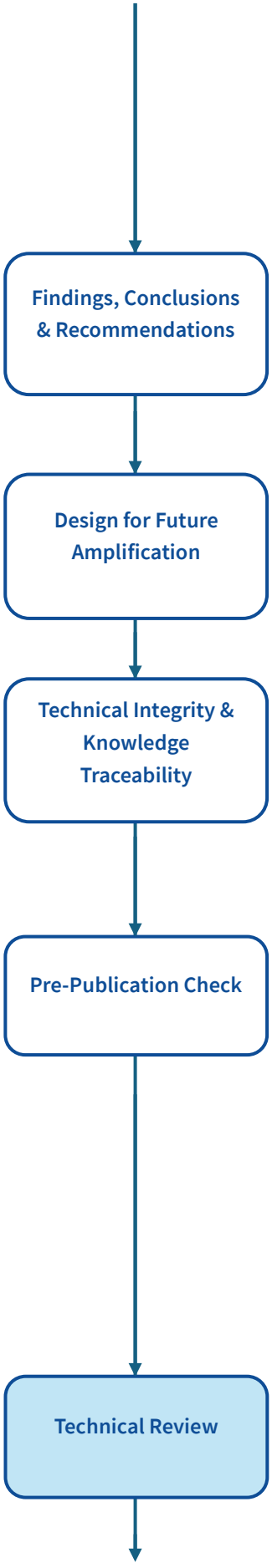
- evidence and sources are properly attributed;
- the document adheres to CAETS Publication Standards; and
- the publication is ready to proceed to the final review and endorsement processes.

4. Review and Endorsement

Review and endorsement ensure the technical integrity, communications quality, and institutional authority of CAETS knowledge. Foundational Publications undergo Technical Review, Communications Review, and Council Review and Endorsement.

4.1 Technical Review: Governance Gate

Every Foundational Publication will undergo independent technical review appropriate to its scope, complexity, and significance. The review will assess the evidence, analysis, expert judgments, conclusions, and recommendations to identify



material gaps, unsupported claims, significant uncertainties, or alternative interpretations that could affect the credibility or usefulness of the work. This review underpins the technical integrity of the report.

The Publication Lead is responsible for preparation and conduct of the Technical Review.

4.1.1 Preparing for Independent Technical Review

Technical reviewers must collectively provide the breadth of expertise, independence, and diversity needed to cover the full scope of the report. The reviewer pool should include individuals familiar with the report's potential applications and reflect a mix of gender, career stage, geographic location, and institutional backgrounds, while avoiding bias. Cited references may help identify experts who have written or reviewed related work, and automated tools may also support this process. Each reviewer should receive the full report and a template outlining the review elements.

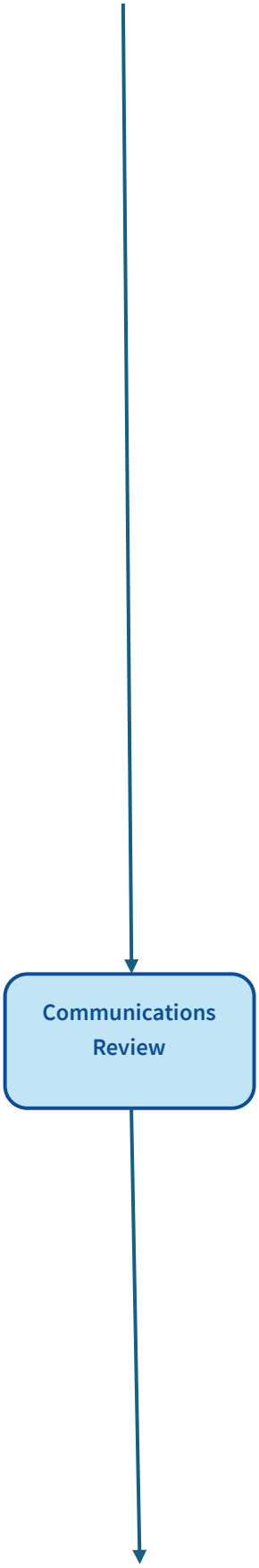
4.1.2 Managing and Documenting Review Comments

The Publication Lead, with assistance from Working Group members, must consider every comment and fully resolve substantive issues. A record of all comments together with their disposition must be retained for submission to the Secretariat for long-term retention. The published Foundational Publication will identify the individuals who participated in the technical review, normally in the Acknowledgements or, where appropriate, in an appendix.

4.1.3 Submission to the Secretariat

Upon completion of the Technical Review, the Foundational Publication, together with the documentation regarding the technical review, will be submitted to the Secretariat, who will initiate the subsequent reviews.

4.2 Communications Review—Governance Gate



The Communications review will occur sufficiently early to permit meaningful improvement and will be provided or coordinated by the Communications Committee, with Secretariat support as appropriate. This review may be conducted in parallel with the Technical Review, depending on publication readiness. **It must be completed prior to initiation of the Council review.** The Communications Review will assess adherence to CAETS Publication Standards.

The Chair of the Communications Committee will designate reviewers and will collect and synthesize review comments and recommendations for submission to the Secretariat upon completion of the review.

4.2.1 Managing and Documenting Review Comments

The Secretariat will send the results of the Communications Review to the Publication Lead for action. The Publication Lead will determine the actions to be taken and will document the disposition of each comment upon completion; this documentation will be returned to the Secretariat together with the updated Foundational Publication.

4.2.2 Publication Readiness

The updated publication, together with the record of comments and their disposition will be made available to the Communications Committee, to permit additional refinement and/or enforcement of Publication Standards. After reviewing the updated document, the Communications Committee may make a recommendation to the Council regarding whether the document is publication-ready from a communications perspective.

4.3 Council Review & Endorsement: Governance Gate

The Secretariat distributes the Foundational Publication to CAETS member academies for review and Council endorsement. **Council endorsement of the Foundational Publication is achieved when at least one-third of CAETS member academies endorse the publication, in accordance with CAETS governance requirements.**

Member academies are also asked to authorize subsequent publication of Companion Deliverables that are demonstrably linked to the Foundational Publication in terms of Technical Integrity and Knowledge Traceability without further Council Review. **This authorization also requires approval by at least one-third of the member academies.**

4.3.1 Soliciting Member Academy Reviews

Member academies are invited to provide comments and non-binding suggestions for improvement. All suggestions must be considered by the Publication Lead.

4.3.2 Responding to Member Academy Reviews

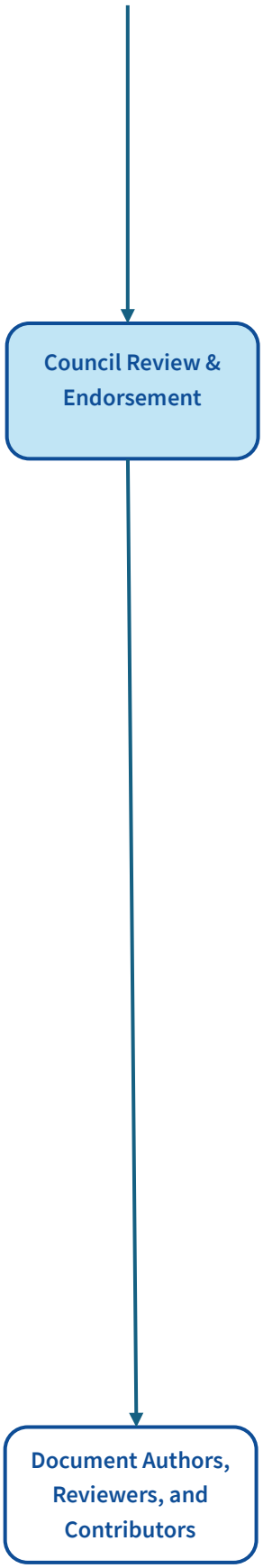
The Secretariat collects the member academy reviews and sends the Publication Lead a synthesized summary, unless a lengthy review period makes periodic compilations more practical. The Publication Lead, working with the Working Group members, determines the appropriate response to each suggestion and documents its disposition. The Publication Lead then returns this documentation and the updated Foundational Publication to the Secretariat, which informs the academies that submitted suggestions of the disposition of their feedback.

Failure to gain endorsement of the Foundational Publication by at least one-third of the member academies at this stage will result in either renewed effort to gain additional endorsements through the review process described above or termination of the Knowledge Initiative.

Assuming that the Foundational Publication is endorsed, failure to gain authorization to publish Companion Deliverables without Council review means that all Companion Deliverables from this Foundational Publication will be subject to the full Council endorsement process.

4.4 Document Authors, Reviewers, and Contributors

The Publication Lead will document authors, contributors, and technical reviewers and insert that information into the completed Foundational Publication to be submitted to the Secretariat. This information may be included in the Acknowledgements section of the report or in an Appendix, if lengthy.



4.5 Submit for Publication and Release

Upon completion, the final document, together with the final record of changes made in response to Council feedback and required information about authors, contributors, and reviewers is submitted to the Secretariat, which initiates the Publication and Release phase described in Section 6.



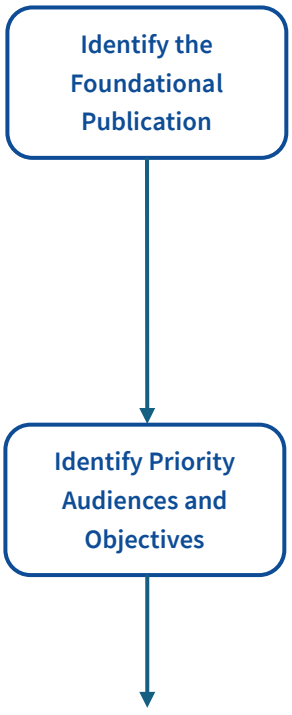
Council endorsement establishes the Foundational Publication as authoritative knowledge and, if approved, authorizes its publication and amplification through the related Companion Deliverables to establish the Knowledge Portfolio.

5. Develop the Companion Deliverable(s)

The development process for Companion Deliverables is abbreviated since the authoritative knowledge already exists. A Publication Lead for the Companion Deliverable(s) must be designated or otherwise identified to initiate the process (e.g. a volunteer from the Working Group or other interested individual). A single Publication Lead may be responsible for one or more Companion Deliverables. Key steps are summarized below.

5.1 Identify the Foundational Publication

The Publication Lead must first select the authoritative knowledge assets to be used in creation of the Companion Deliverable(s). A Companion Deliverable is typically derived directly from a selected Foundational Publication, but in some cases, it may be derived from another companion deliverable. (For example, a Policy Brief derived from a Policy Paper could serve as the basis of an Infographic.) A Companion Deliverable may also be derived via synthesis of knowledge from a family of Foundational Publications as illustrated in Figure 3. In any case, the authoritative knowledge used to develop a Companion Deliverable must be traceable to one or more Foundational Publications.



5.2 Identify Priority Audience & Objectives

Having established the knowledge base, one or more Priority Audiences together with objectives for each must be identified. Technical depth, terminology, structure, explanation, and presentation must reflect what that audience needs to understand and use the work. Language, tone, and technical complexity must also be appropriate for the Priority Audience(s) and purpose of the publication. Definition of a clear objective—how the audience will use the knowledge—is needed to further shape the Companion Deliverable.

5.3 Adapt the Authoritative Knowledge

The Publication Lead will adapt the authoritative knowledge—reframing it for use by specified Priority Audience(s). Companion Deliverables may substantially adapt language, change emphasis, reduce the level of detail, and restructure the content, but must maintain clear linkage to the underlying knowledge asset(s). This adapted knowledge may be used to create one or more Companion Deliverables instantiated in differing formats and disseminated via multiple communications channels. (For example, the adapted knowledge could be used to create both an infographic and a brief video.) A variety of potential formats for Companion Deliverables is described in Section 3.1. The Publication Lead may enlist other individuals who are adept at creation of specific formats to assist in development of the Companion Deliverable(s).

5.4 Pre-Publication Check:

The Publication Lead is responsible for ensuring that the adapted knowledge used in creation of the Companion Deliverable(s) retains clear linkage to its authoritative foundation. Multiple-source relationships should be identified and documented. If content not clearly traceable to the Foundational Publication(s) is identified by the Publication Lead, two options exist: rework the Companion Deliverable to exclude the problematic content; or subject the Companion Deliverable to the full Council Review and Endorsement process. The Publication Lead will submit the completed Companion Deliverable, together with documented pre-check results, to the Secretariat, which will coordinate the final review process.

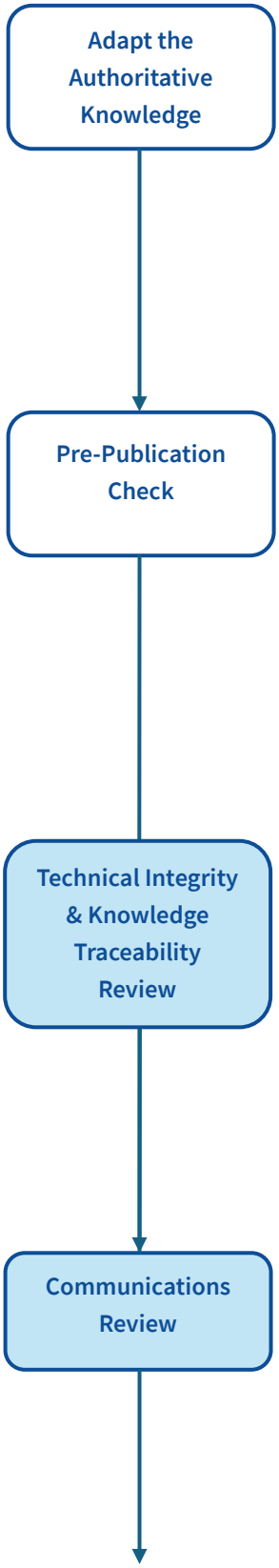
5.5 Technical Integrity & Knowledge Traceability Review: *Governance Gate*

The Publication Lead(s) of the Foundational Publication(s) used to create the Companion Deliverable will conduct a Technical Integrity & Knowledge Traceability review to ensure that it maintains demonstrable linkage to the underlying knowledge assets. (If a Publication Lead is unavailable, another qualified individual will be designated for this purpose.) This review must be fully documented.

If this review determines that the Companion Deliverable contains content not traceable to the Foundational Publication(s), it must be modified to exclude that content or subjected to the full Council review and endorsement process described in Section 4.3.

5.6 Communications Review: Governance Gate

A Communications Review will be conducted by designees from the Communications Committee to ensure adherence with Publication Standards. Review results may indicate the need for further refinement of the Companion Deliverable, in which case they will be forwarded to the Companion Deliverable Publication Lead for consideration. ***If the Publication Lead makes substantive changes that impact Technical Integrity and Knowledge Traceability, those changes must be reviewed by the Foundational Publication Lead or designee prior to finalization***. The Publication Lead will document the disposition of the Communications Review. The Communications Committee may assess whether the updated deliverable is publication-ready from a communications perspective.



5.7 Submit for Publication & Release



Assuming both the Technical Integrity and Knowledge Traceability review and the Communications review are successfully completed, together with **confirmation that Council endorsement of the referenced Foundational Publication(s) also authorized publication of Companion Deliverables absent further review**, the Companion Deliverable Publication Lead will submit the final deliverable, together with review documentation to the Secretariat for Publication and Release.

6. Publication and Release

6.1 Preparing the Final Publication Package [See Reference A]

The Secretariat will prepare the final publication package upon receipt of the completed version of the document together with full documentation of all governance reviews.

A standardized Publication Page will be developed in accordance with Reference A. A downloadable template will be available via the Resources section for initial use by the Publication Lead. The Secretariat will complete the template, inserting the DOI as well as the list of member academies who endorsed the publication (as applicable). Some Companion Deliverable formats will not have a Publication Page.

6.2 Persistent Identification

Each Foundational Publication will receive a Digital Object Identifier (DOI) providing a persistent identifier for the publication and its associated metadata. Companion Deliverables may also receive a DOI when persistent identification, independent citation, or broader discovery would add value. The Secretariat will reserve the DOI late in the pre-publication process, once the title is stable and the publication is near final.

6.3 Controlled Publication Record [See Reference B]

The Secretariat will establish and maintain a single Controlled Publication Record for every publication. It will include descriptive metadata derived from the publication itself; relationship metadata that retains connections to other publications (e.g. linkages between Foundational Publications and Companion Deliverables); and discovery-related metadata to enable search engines to find and share the content. Metadata content will evolve as new tools and techniques become available.

6.4 Distribution to Primary and Priority Audiences

The publication may be distributed via direct communications channels to increase engagement and impact. Such channels will be identified by Working Group members, with assistance from the Communications Committee, to reach and engage Primary and Priority Audiences directly.

6.5 Dissemination via the CAETS Knowledge Platform

Every publication will be released for dissemination via the Knowledge Platform, which supports publicly accessible communications channels. Current channels include the CAETS website and LinkedIn; other channels will be added as the system evolves.

The Platform will maintain the portfolio relationships that link Foundational Publications and their Companion Deliverables to enable search and discovery. It also will retain linkage of a family of Foundational Publications that may underpin a synthesis Companion Deliverable.

6.6 Dissemination via Zenodo

Foundational Publications will be deposited into Zenodo (provider of the DOI), providing a persistent external repository with an additional pathway for discovery beyond the CAETS Platform. Companion Deliverables with an assigned DOI will also be deposited. The Zenodo record will contain the publication and associated metadata to support discovery through broader scholarly and digital information environments.

Together, the CAETS Platform and Zenodo serve complementary purposes: the CAETS Platform provides institutional context and connections among CAETS knowledge, while Zenodo provides persistent external storage, identification, and broader discovery.

6.7 Institutional Archive

The Secretariat will maintain a restricted-access institutional archive associated with the Controlled Publication Record (See Reference B) containing the materials needed to preserve, manage, update, translate, adapt, and reuse the Foundational Publication and its Companion Deliverables. The archive will contain editable source files together with their graphics and other reusable assets.

7. Managing and Evolving a Knowledge Portfolio

7.1 Adding Companion Deliverables After Publication

Working Groups are encouraged to consider Companion Deliverables while developing Foundational Publications, as this may shape the publication's structure. For example, a well-structured Executive Summary could serve as the basis for a standalone Companion Deliverable, helping engage broader audiences and provide easy access to the underlying work.

In practice, most Companion Deliverables will be developed after publication. Ongoing development and dissemination helps reach new audiences, keep communications current for users, and leverage new communications channels that require different publication formats.

The process detailed in Chapter 5 provides the guidance needed to continue addition of Companion Deliverables after publication.

7.2 Updating or Replacing Deliverables

Foundational Publications as well as Companion Deliverables may require correction, supersession, or replacement over time for a variety of reasons, including identification of errors or obsolescence due to technological or environmental factors. Changes to an endorsed Foundational Publication must preserve the integrity of the endorsed record and follow governance appropriate to the nature of the change. Records of updates will be maintained via the Controlled Publication Record described in Section 6.3; updated versions will be made available via the CAETS Knowledge Platform as well as the Zenodo repository.

If a published deliverable must be replaced, it will be no longer presented as current on the CAETS Knowledge Platform. The Secretariat will also work with Zenodo to determine whether the publication can be removed or access can be restricted. (Zenodo permits updates but limits removal of publications deposited more than 30 days before the request; however, public access may still be restricted.)

7.3 Five-Year Portfolio Currency Review

CAETS Knowledge Portfolios will be reviewed for currency every five years, or earlier when significant developments warrant reconsideration. The review will begin with the Foundational Publication as the

authoritative knowledge base but will consider the continuing usefulness, relevance, and coherence of the Knowledge Portfolio as a whole.

The Secretariat will coordinate this review, consulting appropriate subject-matter experts and others as needed. The review will consider whether the Foundational Publication remains current and authoritative; whether existing Companion Deliverables remain accurate, useful, and appropriately linked to the authoritative source; and whether changes in knowledge, technology, policy, audience needs, or the external environment warrant further action. It also supports the ongoing evolution of the Knowledge Ecosystem.

The review may recommend continued use without change; targeted updating or development of Companion Deliverables; replacement of the Foundational Publication; or designation of some or all of the portfolio as archival. The Secretariat will present the findings and recommended disposition to the Board.

Material designated as archival will remain accessible as part of the CAETS institutional record but will be clearly identified as no longer representing current authoritative CAETS knowledge. Where successor publications or deliverables exist, they will be clearly linked.

7.4 Learning and Experimentation

Adaptive Evolution, one of the Core Principles underlying this approach, acknowledges the need to continue to adapt and evolve implementation processes and guidance to leverage new tools and new communications channels. A key enabler of this adaptation will be feedback from users of this guide. Understanding better what works and what doesn't will help identify and improve the Guide over time.

Additionally, tools and technologies will continue to evolve, providing new opportunities as well as new perils. CAETS must keep pace with the evolving environment and adapt its infrastructure and processes accordingly. This will typically be accomplished through piloting of emerging tools, experimentation to better understand how to optimize our publications for multilingual publication, exploration of new communications channels, and identification of new publication formats that extend our engagement with new audiences.

8.0 Other Types of CAETS Communications

Sections 1–7 address public communications developed by Working Groups. CAETS also issues public announcements about events and other activities, as well as public statements arising from its annual meetings or other circumstances. Announcements, such as notices of upcoming events or the Communications Prize award, should follow applicable CAETS Publication Standards but generally do not require review by member academies. The Secretariat and the Chair of the Communications Committee oversee these communications.

8.1 CAETS Statements

CAETS Statements represent member academies' views and require both Communications Review and Council Review and Endorsement described in Sections 4.2 and 4.3. Because Statements are typically brief (1–3 pages) and may be time-sensitive, the reviews occur in parallel. If the Secretariat or Communications Committee Chair identifies substantive changes resulting from the review process, the final version may be recirculated to member academies to reaffirm endorsement.