

OTM-R Checklist

Case number:

Name Organisation under review:

Organisation's contact details:

Date endorsement charter and code:

Open, Transparent, and Merit-based Recruitment Check-list: OTM-R

A specific self-assessment checklist is provided for Open, Transparent and Merit-Based Recruitment (OTM-R). Please report on the status of achievement by responding in the "Answer" column: **++Yes completely / +- Yes substantially / -+ Yes partially / -- no**. Also detail on the indicators and the form of measurement used in the "Suggested Indicators (on form of measurements)" column.

- The "Open", "Transparent" and "Merit-based" checkboxes are indicative of the type of policies and practices the questions refer to, as detailed in the C&C. They are pre-set in the HRS4R E-tool and cannot be changed. No action is needed from institutions in their respect.
- The difference between "+/- Yes substantially" and "-/+ Yes partially" ratings is that in the first case the volume of the remaining work to be done until completion is little as compared to the effort that has been put so far in that direction, whereas for "-/+ Yes partially", the remaining work is either the same in volume or more than what has been achieved.
- For the "Suggested indicators" column, whenever the user hovers the mouse in the row dedicated to each question, a small text box will pop up, indicating options of potential indicators to use. However, each institution should identify own measurements of the effectiveness of its OTM-R policy which should be further reviewed and adapted.

	Open	Transparent	Merit-based	Answer: (++Yes completely / +- Yes substantially / -+ Yes partially / -- no)	Suggested indicators (or form of measurement)
OTM-R system					
Have we published a version of	x	x	x	+	The OTM-R policy is published only in English: https://www.paleo.pan.pl/files/mate/img/IPalPAN/Dokumenty/HR/OTM_R_Policy_IPAL_PAS.pdf

our OTM-R policy online (in the national language and in English)?					
Do we have an internal guidesetting out clear OTM-R procedures and practices for all types of positions?	x	x	x	++	Yes, but only Polish: https://www.paleo.pan.pl/files/mate/img/IPalPAN/Dokumenty/HR/Regulamin%20rekrutacji%20na%20stanowiska%20naukowe%20IPal%20PAN%2014%2005%202024.pdf
Is everyone involved in the process sufficiently trained in the area of OTM-R?	x	x	x	++	The OTM-R procedures and practices covering all types of positions have been formally published on our institutional website and distributed to all staff concerned. This ensures that everyone involved has access to the necessary guidance and training resources. Additionally, one person involved in the process regularly takes part in HR Excellence trainings which provide knowledge concerning the OTM-R. It is passed on to the WG members during meetings.
Do we make (sufficient) use of e-recruitment tools?	x	x		+	As a small institute, we do not find it necessary to implement complex e-recruitment tools. We handle applications by email and use Zoom for occasional online interviews, along with EURAXESS tool, and webpages of the National Science Centre.
Do we have a quality control system for OTM-R in place?	x	x	x	+	We do not have a separate, formal quality control system dedicated solely to OTM-R. However, recruitment procedures are monitored by the institute's management, and the recruitment regulations include a specific provision on quality control to ensure compliance with OTM-R principles.
Does our current OTM-R policy encourage external candidates to apply?	x	x	x	++	Yes, our OTM-R procedures are publicly accessible, ensuring that external candidates are encouraged to apply.
Is our current OTM-R policy in line with policies to attract researchers from abroad?	x	x	x	++	Yes, our OTM-R procedures are published in English and publicly accessible (also via EURAXESS), ensuring that external candidates are encouraged to apply
Is our current OTM-R policy in line with policies	x	x	x	++	Yes, our current OTM-R policy is designed to be inclusive and in line with broader policies aimed at attracting underrepresented groups. Recruitment procedures are transparent and publicly available to ensure equal opportunities for all candidates.

to attract underrepresented groups?					
Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers?	x	x	x	+	Yes, our current OTM-R policy is in line with policies aimed at providing attractive working conditions for researchers. The Institute offers a social package for employees, including co-financing for holidays for employees and their families, and private medical care coverage. While salaries are determined by statutory regulations and the Institute relies primarily on public funding, we strive to ensure that other aspects of employment (assess to e.g., laboratories) are supportive and beneficial for researchers.
Do we have means to monitor whether the most suitable researchers apply?				+	We do not have a formal monitoring system, but applications are reviewed carefully to ensure the most suitable candidates are selected.
Advertising and application phase					
Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?	x	x		++	YES
Do we include in the job advertisement references/links to all the elements foreseen in the relevant section of the toolkit?	x	x		++	Yes, our job advertisements include references or links to all relevant elements outlined in the OTM-R toolkit. This ensures that candidates have access to complete information about the position, recruitment procedures, and applicable policies.
Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?	x	x		++	YES
Do we make use of other job	x	x		++	YES (NCN and government webpages)

advertising tools?					
Do we keep the administrative burden to a minimum for the candidate?	x			++	Yes, we keep the administrative burden to a minimum for candidates. Applications are submitted via email with a CV, diploma copy and cover letter, and no unnecessary documents or forms are required.
Selection and evaluation phase					
Do we have clear rules governing the appointment of selection committees?		x	x	++	Yes, the rules for appointing selection committees are clearly defined in our recruitment regulations. https://www.paleo.pan.pl/instytut/praca-i-kariera.html
Do we have clear rules concerning the composition of selection committees?		x	x	++	Yes, the composition of selection committees is clearly defined in our recruitment regulations. https://www.paleo.pan.pl/instytut/praca-i-kariera.html
Are the committees sufficiently gender-balanced?		x	x	++	YES
Do we have clear guidelines for selection committees, which help to judge 'merit' in a way that leads to the best candidate being selected?			x	++	Yes, selection committees follow clear guidelines to assess merit and select the best candidate.
Appointment phase					
Do we inform all applicants at the end of the selection process	x			++	YES
Do we provide adequate feedback to interviewees	x			++	YES

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Do we have an appropriate complaints mechanism in place?	x			++	YES (defined in our recruitment regulations) https://www.paleo.pan.pl/instytut/praca-i-kariera.html
Overall assessment					Overall, our recruitment process is transparent, fair, and aligned with OTM-R principles. Procedures and guidelines are publicly available in English (and Polish), and vacancies are advertised openly to encourage applications from both internal and external candidates. While we do not have formal e-recruitment systems or extensive quality control mechanisms due to the institute's small size, management carefully monitors all applications, ensuring merit-based selection and adherence to OTM-R standards. The Institute also provides attractive working conditions through a social package and supportive policies for employees.
Do we have a system in place to assess whether OTM-R delivers on its objectives?				-+	No formal assessment system exists, but recruitment is monitored internally to ensure compliance with OTM-R objectives.