**TEMPLATE 3 – OTM-R Checklist**

Case number:

Name Organisation under review:

Organisation’s contact details:

Submission date:

Date endorsement Charter and Code:

**OTM-R Checklist**

A specific self-assessment checklist is provided for Open, Transparent and Merit-Based Recruitment (OTM-R). Please report on the status of achievement, also detail on the indicators and the form of measurement used.

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| ***OTM-R checklist for organisations*** |
|  | **Open** | **Trans-parent** | **Merit-based** | **Answer:++ Yes, c*ompletely******+/-Yes, substantially*** ***-/+ Yes, partially******-- No*** | **\*Suggested indicators (or form of measurement)** |
| **OTM-R system**  |  |  |  |  |  |
| 1. Have we published a version of our OTM-R policy online (in the national language and in English)? | x | x | x |  | [web link] |
| 2. Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions? | x | x | x |  | [Date of latest update; ensure that it is sent to all staff] |
| 3. Is everyone involved in the process sufficiently trained in the area of OTM-R? | x | x | x |  | - Existence of training programs for OTM-R- Number of staff following training in OTM-R  |
| 4. Do we make (sufficient) use of e-recruitment tools?  | x | x |  |  | Web-based tool for (all) the stages in the recruitment process |
| 5. Do we have a quality control system for OTM-R in place? | x | x | x |  |  |
| 6. Does our current OTM-R policy encourage external candidates to apply? | x | x | x |  | Trend in the share of applicants from outside the organisation |
| 7. Is our current OTM-R policy in line with policies to attract researchers from abroad?  | x | x | x |  | Trend in the share of applicants from abroad |
| 8. Is our current OTM-R policy in line with policies to attract underrepresented groups?  | x | x | x |  | Trend in the share of applicants among underrepresented groups (frequently women)  |
| 9. Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers? | x | x | x |  | Trend in the share of applicants from outside the organisation |
| 10. Do we have means to monitor whether the most suitable researchers apply? |  |  |  |  |  |
| **Advertising and application phase** |  |  |  |  |  |
| 11. Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?  | x | x |  |  |  |
| 12. Do we include in the job advertisement references/links to all the elements foreseen in the relevant section of the toolkit?  | x | x |  |  |  |
| 13. Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?  | x | x |  |  | - The share of job adverts posted on EURAXESS;- Trend in the share of applicants recruited from outside the organisation/abroad |
| 14. Do we make use of other job advertising tools? | x | x |  |  |  |
| 15. Do we keep the administrative burden to a minimum for the candidate?  | x |  |  |  |  |
| **Selection and evaluation phase** |  |  |  |  |  |
| 16. Do we have clear rules governing the appointment of selection committees? |  | x | x |  | Statistics on the composition of panels |
| 17. Do we have clear rules concerning the composition of selection committees? |  | x | x |  | Written guidelines |
| 18. Are the committees sufficiently gender-balanced? |  | x | x |  |  |
| 19. 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 |  | Written guidelines |
| **Appointment phase** |  |  |  |  |  |
| 20. Do we inform all applicants at the end of the selection process?  |  | x |  |  |  |
| 21. Do we provide adequate feedback to interviewees? |  | x |  |  |  |
| 22. Do we have an appropriate complaints mechanism in place? |  | x |  |  | Statistics on complaints |
| **Overall assessment**  |  |  |  |  |  |
| 23. Do we have a system in place to assess whether OTM-R delivers on its objectives? |  |  |  |  |  |