



Human Resources Strategy for Researchers

Call for expressions of interest for the creation of a pool of Peer reviewers for Step 5 (external evaluations)

Introduction

The Commission Recommendation on the European Charter for Researchers and a Code of Conduct for the Recruitment of Researchers was adopted in March 2005¹. Both the Charter and the Code of Conduct address the roles, responsibilities, and entitlements of researchers and their employers or funding organisations. The European Charter for Researchers aims at ensuring that the relationship between these parties contributes to the successful generation, transfer and sharing of knowledge, and to the career development of researchers. The Code of Conduct for the Recruitment of Researchers aims at improving recruitment processes through fairer and more transparent selection procedures and by taking into account different means of judging merit.

Since its adoption, the Commission has promoted the Charter & Code through a multitude of activities including various high level conferences and workshops. It encourages employers and funders of researchers to publically declare their support to the principles underlying the Charter & Code. To date, more than 450 organisations representing more than 1200 individual institutions from 35 Member States and Associated Countries have endorsed the Charter & Code principles² by sending a written statement to the European Commission which is then published on the EURAXESS Rights website.

However, many actors have been asking for a more formalised process to commit to the Charter & Code while keeping the administrative burden as low as possible. Such a formalised process should reward organisations committing to and engaging in the actual implementation of the Charter & Code principles by signalling their effort to the public, thus increasing their attractiveness to researchers who would identify them as providing a stimulating and favourable working environment.

In response, the "Human Resources Strategy for Researchers" (HRS4R) was launched at the French Presidency conference on "Young Researchers" that took place in Rennes in November 2008. The mechanism consists of five main steps³:

1. An internal analysis by the organisation, involving all key institutional players, to compare institutional practices against the Charter and Code principles;
2. The development and publication of an Institutional Human Resources Strategy for Researchers together with an Action Plan detailing the proposed actions for improvement in compliance (what, by when, by whom);
3. The “acknowledgement” of the institution’s Institutional Human Resources Strategy for Researchers by the European Commission;

¹ http://ec.europa.eu/euraxess/pdf/brochure_rights/am509774CEE_EN_E4.pdf

² <http://ec.europa.eu/euraxess/index.cfm/rights/charterAndCode>

³ http://ec.europa.eu/EURAXESS/pdf/hrs4r/Paper_on_the_HR_Strategy_for_Researchers.pdf

4. The implementation of the Institutional Human Resources Strategy for Researchers and the associated Action Plan by the institution, which through its internal quality assurance mechanism also carries out a self-assessment at least every second year on the basis of which it may update its Human Resources Strategy for Researchers as necessary;
5. An external evaluation, which takes place periodically, but no later than every 4th year. Evaluation is based on a short report prepared by the institution, which is reviewed by a panel of external evaluators (*peer reviewers*) or through Quality Assessment mechanisms, such as National Evaluation Agencies.

In order to allow participating organisations to share experiences, good practices, and different approaches to the Human Resources Strategy for Researchers, in 2009 the Commission set up an “Institutional Human Resources Strategy Group”. This group is composed of universities and other research performing institutions as well as research funding organisations that are fully committed to implementing the principles underlying Charter & Code in their institutional policies and practices by developing institutional Human Resources Strategies for Researchers. Several umbrella organisations and other multipliers are also members of the group and promote the HR Strategy for Researchers among their relevant constituencies. The Institutional HR Strategy Group provides other institutions and the Commission with a valuable source of 'hands-on' information and will help to create the critical mass necessary to bring about sustainable change. Today, the Institutional HR Strategy Group has more than 150 member organisations in three separate cohorts. Several mutual learning seminars for the members of the different cohorts have taken place, giving them the opportunity to discuss their experiences and to define actions for a successful implementation of the HR Strategy for Researchers. Some organisations will be ready soon for Step 5 of the HR Strategy, the external evaluation.

Objectives of this call for expressions of interest

The aim of this call for expressions of interest is to draw up a pool of peer reviewers for Step 5 of the HR Strategy process (external evaluation). The peer reviewers will evaluate the implementation and success of the Institutional HR Strategy for Researchers developed by participating institutions, both on the basis of written material and through site visits. Each peer reviewer will evaluate up to twelve institutions, including visits of up to six institutions depending on the total number of institutions to be evaluated. The first evaluation round will take place in late 2013 and the second round in autumn 2014.

The outcome of the external evaluation will determine whether the Commission will renew or withdraw the acknowledgement of the HR Strategy for Researchers of the participating organizations. The peer reviewers will be supported by Deloitte evaluators who will provide them with adequate training and tools to conduct the evaluation in a coherent, professional and effective way.

Expected role of the peer reviewers

Depending on the number, site visits will be arranged for all or part of the participating organisations. During these site visits, peer reviewers will meet the persons responsible for the implementation of the Institutional HR Strategy and Action Plan (developed during Step 2 of the HR Strategy process). Three peer reviewers will visit each institution during one day. During this meeting, the peer reviewers will identify the extent to which the institution has implemented what

was foreseen in their Institutional HR Strategy and Action Plan and to what extent they were effective in achieving the expected results.

Prior to their visit, the three peer reviewers will receive the documents describing the Institutional HR Strategy and Action Plan of the evaluated institution as well as other relevant background material regarding the organisation. Deloitte will provide all the necessary guidance, a check-list and a questionnaire. Deloitte will remain at the disposal of the peer reviewers during the whole process.

After the visit of the institution, the three peer reviewers will report to Deloitte. A straightforward and short reporting template will be used for this purpose. Deloitte will aggregate the three reports into one single evaluation report that will be communicated to the European Commission as well as the participating organisation.

If the number of organisations wishing to participate in the external evaluations organised by Deloitte exceeds the maximum number foreseen, the evaluations for part of them will be carried out solely on the basis of the written material made available by the organisations.

Expected profile

Candidates for the pool of peer reviewers should fulfil the following prerequisites:

- Be experienced human resources staff officers;
- Have a good knowledge of the Charter & Code;
- Come from universities or research institutions;
- Have experience in internal audit and/or evaluation of organisations;
- Be good at explaining complex issues to peers from diverse cultural and institutional backgrounds;
- Be confident speaking in front of a group of peers;
- Be able to lead and steer a discussion in a results oriented way;
- Be good at summarising discussion results and at presenting them in a clear and well-structured way in writing;
- Have good interpersonal skills;
- Have a very good command of English.

We offer

- An exceptional opportunity to participate in a key policy initiative of European dimension;
- The chance to visit universities and other research performing institutions as well as research funding organisations in different parts of Europe, and to share your experience with them;
- A one-day training in Brussels explaining in detail the evaluation and reporting process, and the European Commission's expectations;
- Reimbursement of all costs relative to the travels and accommodations;
- Attractive fees.

Recruitment process

Deloitte will collect the expressions of interest. Deloitte evaluators will analyse the CVs and forms received. Taking into account this analysis, the European Commission will decide which candidates will be admitted to the next step. Deloitte will then notify all candidates whether they have been selected for a recruitment phone interview or rejected.

Following the recruitment phone interviews, Deloitte evaluators will notify candidates whether they have been selected for the pool or not. The selected peer reviewers will participate in a one-day training session in the Deloitte premises in Brussels in May 2013.