TEMPLATE 3 – OTM-R Checklist

Case number: **2023ES81286**

Name Organisation under review: **Instituto de Investigación Sanitaria de Navarra (IdiSNA)**

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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.

OTM-R checklist for organisations					
	Open	**Trans-parent**	**Merit-based**	**Answer:** **++ Yes, *completely*** ***+/-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	++	IdiSNA has an OTM-R Policy published in both English and Spanish. **Link:** https://www.idisna.es/rrhh/hrs4r

OTM-R checklist for organisations					
	Open	Trans-parent	Merit-based	Answer: ++ Yes, *completely* +/-Yes, *substantially* -/+ Yes, *partially* -- *No*	*Suggested indicators (or form of measurement)
2. Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions?	x	x	x	-/+	IdiSNA has internal recruitment guidelines. Work will be done to develop a Human Resources Policy that integrates the OTM-R principles for all types of positions. **Indicators:** • Personnel Management Procedure developed and updated. • Date of the latest update.
3. Is everyone involved in the process sufficiently trained in the area of OTM-R?	x	x	x	-/+	There are currently no specific training programs for OTM-R principles. Only, the Human Resources staff do have specific training. **Indicators:** • Existence of training programs for the application of OTM-R principles. • Number of training activities organized.
4. Do we make (sufficient) use of e-recruitment tools?	x	x			+/-	IdiSNA has an electronic tool for the management of the different job offers, accessible from the institution's website. This is where the documentation relating to the different job offers is published and managed. https://www.idisna.es/conocenos/trabajar-con-nosotros **Indicators**: • Link to job portal.
5. Do we have a quality control system for OTM-R in place?	x	x	x	--	There is no quality control system in place for OTM-R.

OTM-R checklist for organisations					
	Open	**Trans-parent**	**Merit-based**	**Answer:** **++ Yes, *completely*** ***+/-Yes,*** ***substantially*** ***-/+ Yes, partially*** ***-- No***	***Suggested indicators (or form of measurement)**
					Indicators: • Date of the latest internal audit performed.
6. Does our current OTM-R policy encourage external candidates to apply?	x	x	x	+/-	**Indicators:** • Percentage of applicants from outside.
7. Is our current OTM-R policy in line with policies to attract researchers from abroad?	x	x	x	-/+	The institution's OTM-R policy allows foreign candidates to participate in the selection process. **Indicators:** • Number of nationalities. • Percentage of foreign applicants.
8. Is our current OTM-R policy in line with policies to attract underrepresented groups?	x	x	x	+/-	**Indicators:** • Trend in the share of applicants among underrepresented groups.
9. Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers?	x	x	x	-/+	**Indicators:** • Trend in the share of applicants from outside the organization.
10. Do we have means to monitor whether the most suitable researchers apply?				+/-	The suitability of the different candidates is assessed in each case based on the merits and experience accredited during the selection process and based on their suitability for the post offered. **Indicators:** • Annual revision of OTM-R results.

OTM-R checklist for organisations	Open	Trans-parent	Merit-based	Answer: ++ Yes, *completely* +/-Yes, *substantially* -/+ Yes, *partially* -- *No*	*Suggested indicators (or form of measurement)
Advertising and application phase					
11. Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?	x	x		-/+	Job offers are adjusted to the same template. They are disseminated through the IdiSNA web portal. No offers have yet been published through EURAXESS. **Indicators:** • Advertising procedure. • Templates availability. • Number of jobs offers published on the EURAXESS.
12. Do we include in the job advertisement references/links to all the elements foreseen in the relevant section of the toolkit?	x	x		-/+	Reference is made to the research project in which you will participate, as well as the funding body. **Indicators:** • Number of elements referenced / linked.
13. Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?	x	x		--	Currently, the EURAXESS portal has not been used for the publication of job vacancies. **Indicators:** • Number of offers published in EURAXESS.
14. Do we make use of other job advertising tools?	x	x		+/-	Job offers are also disseminated through the institution's social networks (Twitter, Linkedin) and on other state-level portals (REGIC). **Indicators:** • Number of offers published on other websites and platforms.

OTM-R checklist for organisations	Open	Trans-parent	Merit-based	Answer: ++ Yes, *completely* +/-Yes, *substantially* -/+ Yes, *partially* -- No	*Suggested indicators (or form of measurement)
15. Do we keep the administrative burden to a minimum for the candidate?	x			+/-	Those interested in the job vacancies offered must initially upload their CV and indicate their personal details in the electronic tool. Shortlisted candidates are then asked to provide proof of the various merits indicated in their CVs. **Indicators:** • Average number of commonly requested documents.
Selection and evaluation phase					
16. Do we have clear rules governing the appointment of selection committees?		x	x	-/+	The personnel management procedure does not establish specific guidelines for the appointment of selection boards. The selection committees are in line with the position offered. **Indicators:** • Statistics on the composition of committees.
17. Do we have clear rules concerning the composition of selection committees?		x	x	-/+	There are no specific guidelines on the composition of selection committees. **Indicators:** • Written guidelines.
18. Are the committees sufficiently gender-balanced?		x	x	-/+	This depends to a large extent on the research groups in which the selected person will be integrated. Gender balance in selection committees is not currently monitored.

OTM-R checklist for organisations	Open	Trans-parent	Merit-based	Answer: ++ Yes, *completely* +/-Yes, *substantially* -/+ Yes, *partially* -- *No*	*Suggested indicators (or form of measurement)
					Indicators: • Number of selection committees gender balanced. • % women.
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	+/-	The selection committee must have the appropriate experience and skills for the selection of the candidate. Through the evaluation of merits and interviews, they select the most suitable person for the position offered. **Indicators:** • Written guidelines.
Appointment phase					
20. Do we inform all applicants at the end of the selection process?		x		+/-	**Indicators:** • % of applicants notified.
21. Do we provide adequate feedback to interviewees?		x		-/+	**Indicators:** • % of candidates informed of the result.
22. Do we have an appropriate complaints mechanism in place?		x		-/+	There is not currently specific complaints procedure. **Indicators:** • Number of requests of information received and answered.

OTM-R checklist for organisations		Open	Trans-parent	Merit-based	Answer: ++ Yes, *completely* +/-Yes, *substantially* -/+ Yes, *partially* -- *No*	*Suggested indicators (or form of measurement)
Overall assessment						
23. Do we have a system in place to assess whether OTM-R delivers on its objectives?					-/+	Currently, there are no specific monitoring mechanisms in place. **Indicators:** • Assessment of compliance with the Action Plan. • Date of the last revision of the OTM-R policy.