OTM-R (Open Transparent Merit-based Recruitment) in a nutshell
WHAT IS OTM-R?

OTM-R is one of the pillars of the European Charter for Researchers and in particular of the Code of Conduct for the Recruitment of Researchers, launched in 2005.

• **OPEN**: Institutions must advertise positions openly and widely in order to reach the widest pool of candidates

• **TRANSPARENT**: Recruitment process must be simple and clear. External candidates must have access to the same information as internal candidates

• **MERIT-BASED**: selection must be based on researchers’ merit: the best possible candidate gets the job
WHY OTM-R? 1.

- OTM-R ensures equal opportunities for all candidates and facilitates mobility.
- Ensures that all recruitment procedures are based on principles of equal opportunities for all candidates (including internal and external).
- Ensures that the best person for the job is recruited.

In sum: an OTM-R system brings benefits to researchers, institutions and the country’s research system, and contributes to the full implementation of the ERA.
WHY OTM-R? 2.

OTM-R is a fairer system and has a positive impact on:

• International mobility
• Attractiveness of a research career in EU
• Equal access to job opportunities for men and women
When is a recruitment process OPEN?

- A recruitment process can be considered OPEN when it encourages external candidates to apply and also attracts researchers from abroad.

In concrete, applicants should be able to easily find information on:
- organisation and recruiting unit
- job title, specifications and starting date
- researcher career profiles (R1-R4) with the respective 'required' and 'desirable' competencies
- selection criteria including knowledge and professional experience (distinguishing 'required' and 'desirable')
- number of available positions
- working conditions, workplace, entitlements (salary, other benefits, etc.), type of contract
- professional development opportunities
- career development prospects
When is a recruitment process OPEN and TRANSPARENT? 1.

The INSTITUTIONAL PROCESS can be considered OPEN and TRANSPARENT when it includes:

- a publicly accessible institutional recruitment policy;
- institutional recruitment regulations which are clear to applicants & reviewers;
- a system to regularly check, review and revise recruitment regulations;
- a serious mechanism to deal with complaints.

Examples:

- Differentiation between internal promotions and new recruitment
- No fake vacancies for internal promotions as open positions
- No reservations of open positions for internal candidates
When is a recruitment process OPEN and TRANSPARENT? 2.

The **APPLICATION PHASE** can be considered OPEN and TRANSPARENT when:

- advertisement uses the **R1-R2-R3-R4 framework terms**;
- interested candidates and applicants receive all **the relevant information**;
- **administrative burden** is minimal for the candidates but also for the selection committees.

**Example**

*Candidates unfamiliar with the ‘local system’ must be able to assess the attractiveness of a position and to fully understand the application procedure.*
When is a recruitment process TRANSPARENT?

The SELECTION PHASE can be considered TRANSPARENT when:

- the selection panel composition is objective & made public;
- the communication with candidates/applicants (acknowledgement feedback) is timely and appropriate.

Example

*The process of nominating and appointing the selection committee guarantees a diversity of members, balancing internal and external experts, bringing in competency and objectivity.*
When is a recruitment process BASED on MERIT? 1.

• While an absolute and universally acceptable definition of ‘merit’ is virtually impossible to achieve, the EC WG agrees that a recruitment system can be considered merit-based when it is able to ensure that the institution recruits the best person for the job.

• The application of the European Framework for Research Career, which identifies both required and desirable competences for each profile (R1 to R4), may substantially help research institutions willing to adopt a genuine OTM-R system.
When is a recruitment process BASED on MERIT? 2.

When the selection committee:

- is established for all profiles (R1-R4)
- is adequate for the profile, in terms of size and composition
- is independent, objective, and takes evidence-based decisions

Examples

- inclusion of
  - external experts (outside the institution),
  - international experts,
  - experts from different sectors
- relevant experience, qualifications and competencies of members to assess each candidate
When is a recruitment process BASED on MERIT? 3.

When the criteria for selecting researchers

- foresee appropriate assessment and evaluation of a wide spectrum of qualifications (encompassing non-formal qualifications, skills and competences, international portfolio);
- are focused on past performance and future potential, with a different respective weight according to the profile (R1-R4);
- are consistent with the requirements of the position;
- combine qualitative and quantitative judgment, focusing on results within a diversified career path
Examples

A wide range of evaluation criteria should be used and balanced, according to the position and the specific profile of the post; these criteria may include:

- acquisition of funding;
- generation of societal impact;
- international portfolio (including mobility);
- knowledge transfer and exchange;
- management of research and innovation;
- organizational skills/experience;
- outreach/public awareness activities;
- research performance;
- supervision and mentoring;
- teaching;
- teamwork
What should an OTM-R system look like?

It should:

• be based on a **review** of the current OTM-R policy, practices and procedures (i.e. OTM-R system)
• foresee the **publication** of the (revised) OTM-R system
• establish/adapt an ‘OTM-R guide’, on which to **train** (and raise awareness of) the personnel
• be embedded into the institutional **Quality Control** System
• consider to develop and incorporate an **e-recruitment** tool.
OTM-R Quality Control

To assess whether an OTM-R system genuinely works as such, it should be consistently monitored by an efficient and effective Quality Control mechanism.

Examples
• periodical, external review by independent observers
• forms for internal reporting on all phases of the recruitment process
• means to assess whether the OTM-R system delivers on its objectives
Disclaimer

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