



HR Excellence in Research & Gender Equality Plan



A few words about *HR Excellence in Research*?

HR EXCELLENCE IN RESEARCH

HR Excellence in Research is a prestigious award aimed at increasing the attractiveness of working conditions and career development of researchers in the EU.

The right to use HR Excellence in Research award, granted by the European Commission to research institutions declaring recognition of the requirements contained in the **European Charter for Researchers** and the **Code for the Recruitment of Researchers**, is beneficial for both the employer and the employee.



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What are the benefits of having the HR award?

- **prestige and distinction of the institute**
- **a significant increase of attractiveness of employment**
- **rewarding research institutions applying for international grants within European Union Framework Programme Horizon Europe in the field of research and innovation**



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European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers

- It is document adopted by the European Commission in 2005.
- **The European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers** describe the rights and obligations of both employers and employees.
- Institutions, that have been implemented 40 principles of the Charter and the Code to their internal regulations and thus create a friendly working environment and transparent rules for the recruitment of researchers, are awarded by the European Commission the „**HR Excellence in Research**“.

Download:

https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwjllenV7KT9AhUFzYsKHxUKDsYQFnoECBkQAQ&url=https%3A%2F%2Feuraxess.ec.europa.eu%2Fsites%2Fdefault%2Ffiles%2Fam509774cee_en_e4.pdf&usg=AOvVaw1gvH4CyOYFetzOTK7S5b1E

European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers and OTM-R Policy

40 principles of the **European Charter for Researchers** and the **Code of Conduct for the Recruitment of Researchers** are divided into 4 **thematic groups**:

- ✓ ethical and professional aspects,
- ✓ recruitment,
- ✓ working conditions and social security,
- ✓ training and development.

OTM-R Policy (*Open, Transparent, Merit-based Recruitment*) refers to:

- ✓ the assessment of the recruitment system in the organization,
- ✓ announcements and applications,
- ✓ selection and employment of candidates.

European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers

Charter – provisions and requirements for researchers	Charter – provisions and requirements for employers and financing agencies	General provisions and requirements for the Code
<ul style="list-style-type: none"> • Research freedom • Ethical principles • Professional responsibility • Professional attitude • Contractual and legal obligations • Accountability • Good practice in research • Dissemination, exploitation of results • Public engagement • Relations with supervisor • Supervision and managerial duties • Continuing Professional Development 	<ul style="list-style-type: none"> • Recognition of the profession • Non-discrimination • Research environment • Working conditions • Stability and permanence of employment • Funding and salaries • Gender balance • Career development • Value of mobility • Access to research training and continuous development • Access to career advice • IPR • Co-authorship • Supervision 	<ul style="list-style-type: none"> • Recruitment • Selection • Transparency • Judging merit • Variations in the chronological order of CVs • Recognition of mobility experience • Recognition of qualifications • Seniority • Postdoctoral appointments



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Gender Equality Plan as formal recruitment to obtain HR

It aims to promote gender equality through institutional and cultural changes in research and innovation organizations.

It is the requirement of the Directorate-General for Research and Innovation of the European Commission, according to which

every university, research unit, and public administration unit must have a gender equality plan to apply for funding under the EU Framework Program for 2021-2027 "Horizon Europe (HE)".



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Gender dimension in the Horizon Europe

Gender Equality Plan (GEP) plays as an **eligibility criterion** for public entities.

Gender dimension is included in the research as a **default requirement**.

Gender balance – the aim of 50% of women in the expert panels, HE councils as well as in evaluation committees.

Gender balance in research teams is also used as a **ranking criterion** for applications with the same number of points on the ranking list.



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GEP – formal requirements

To meet the eligibility criterion under the Horizon Europe program,
GEP must meet 4 mandatory requirements called "building blocks" and should:

- ✓ be a public document
- ✓ have dedicated resources
- ✓ take into consideration data collection and monitoring
- ✓ Be supported by trainings and raising awareness



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Gender Equality Plan – thematic areas



It is highly recommended to encompass the following five thematic areas in GEP:

- ✓ work-life balance and organizational culture,
- ✓ gender balance in leadership and decision-making bodies,
- ✓ gender balance in recruitment and career development (40-60 rule),
- ✓ inclusion of gender dimension to research and teaching activities,
- ✓ anti-discrimination and anti-mobbing activities, with special attention paid to sexual harassment.



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Gender Equality Officer

At the Institute of Dendrology of the Polish
Academy of Sciences,

Ms. **Katarzyna Szwed-Pietras**
is the Gender Equality Officer.





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Team for the implementation of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers

Steering Committee:

prof. dr hab. inż. Andrzej M. Jagodziński – Director

dr hab. Ewelina Ratajczak, prof. ID PAN – Deputy director for scientific affairs

dr inż. Emilia Pers-Kamczyc – Deputy director for organization and development

Working Group:

dr Karolina Sobierajska – Chairwoman

prof. dr hab. Grzegorz Iszkuło – (R4)

prof. dr hab. Witold M. Wachowiak – (R4)

dr hab. Tomasz Leski, prof. ID PAN – (R3)

dr inż. Mikołaj Wawrzyniak – (R2)

mgr inż. Sonia Paż-Dyderska – (R1)

Katarzyna Szwed-Pietras – Gender Equality Commissioner

mgr Magdalena Łukowiak

mgr Marta Idkowiak

mgr Damian Maciejewski

Gender Equality Plan

Steps of GEP preparation:

1. Diagnosis (Questionnaire)
2. Creation of the plan:
 - general objectives
 - specific objectives
 - ways of implementation
3. Implementation, including training and raising awareness
4. Evaluation and monitoring



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ANETA - PLAN ROZWOJU PŁCI: QUESTIONNAIRE - GENDER EQUALITY PLAN

1. IDENTYFIKACJA – proszę podać swoje dane osobowe w punktach 1-6:
IDENTIFY YOURSELF - please provide the selected answer in points 1-6

1. Płeć / Gender:
 - a) Kobieta (F) / Woman (F)
 - b) Mężczyzna (M) / Man (M)
 - c) Inne (I) / Other (I)
2. Przedział wiekowy / Age range:
 - a) 21-30
 - b) 31-40
 - c) 41-50
 - d) 51-60
 - e) 61+
3. Stan cywilny / Marital status:
 - a) samotna/samotny / married
 - b) wdowa/wdowiec / widowed
 - c) partnerka/partner / couple
 - d) rozwiedziona / rozwiedziony / divorced
4. Status rodzinny / Family status:
 - a) dziecko/children
 - b) bezdziałek/without children
 - c) opiekun prawny / custody
5. Zaangażowanie / Engagement:
 - a) jestem w pracy na stałe /employed /contract for a defined time
 - b) jestem w pracy na czas nieokreślony / contract for a non-defined time
 - c) jestem w pracy na okres próbny /probation contract
 - d) emerytalna / retirement
 - e) jestem dyplomowanym /civil law contract
 - f) inne/other



Implementation of the Charter and the Code – step by step

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- ✓ **appointment of the Steering Committee and Working Group**
- ✓ **endorsement letter sent to the European Commission**
- ✓ **GAP analysis**
- ✓ **elaboration of the Action Plan**
- ✓ **implementation and monitoring**

01/2023: appointment of the Steering Committee and Working Group

01/2023: appointment of Gender Equality Officer (**Katarzyna Szwed-Pietras**)

02/2023: endorsement letter signed by the Director and sent to the European Commission. The beginning of implementation of the Charter and Code principles



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Implementation of the Charter and the Code – step by step

- ✓ **01-02/2023:** GAP analysis of internal regulations and national law concerning 40 principles of the Charter and the Code.
- ✓ **02-03/2023:** questionnaire sent to all researchers and PhD students [40 questions]. Based on GAP analysis and obtained results the action plan will be prepared.
- ✓ **04/2023:** meetings of the Steering Committee with researchers and PhD students to discuss the action plan.
- ✓ **06/2023:** the report will be sent to the European Commission, and implementation of the action plan in progress.



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The Charter and the Code – a questionnaire

- Filling in the **questionnaire** is a necessary element in the process of applying for the HR Excellence in Research
- Structure: 40 questions addressing the implementation of the Charter and Code principles at the Institute in relation to 4 pillars:
 1. ethical and professional aspects
 2. recruitment
 3. working conditions and social security
 4. training and development

Granting the Institute the right to use the HR Excellence in Research award **will greatly depend** on the consistency of the **questionnaire results** with the action plan developed on their basis .

Based on the results, the **Action Plan** will be prepared.

Assessment of implementation of the Charter and Code principles of the EC assessors

- The EC awards the institutions the HR Excellence in Research and then assesses the implementation in cycles
- The assessors always come from a different country than the country where the organization is located
- **2 years after** granting the HR award there will be a **remote assessment** – based on the report sent by the institute and information provided on the website
- **5 years after** granting the HR awards there will be a **desk-based assessment**, followed up by a site visit.



HR Excellence in Research & Gender Equality Plan