



Open Transparent and Merit Based Recruitment of Researchers
OTM-R Checklist for INSTITUTE FOR POPULATION AND HUMAN STUDIES – BAS

Approved by the Scientific Council of IPHS with Protocol No 12 as of 17.08.2022

Template 1 – Annex: Open, Transparent and Merit-based Recruitment Check-list¹					
OTM-R checklist for organisations					
	Open	Trans- parent	Merit- based	Answer: ++ Yes, <i>completely</i> +/-Yes, <i>substantially</i> -/+ Yes, <i>partially</i> -- 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	++ Yes, <i>completely</i>	The document is published on the official website of the Institute in Bulgarian and in English: https://www.iphs.eu/n/en/nachalo-2/hr-logo.html
2. Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions?	x	x	x	++ Yes, <i>completely</i>	<p>Law on the Development of the Academic Staff in The Republic of Bulgaria: https://www.lex.bg/laws/ldoc/2135680028</p> <p>Rules for Implementation of the Law on the Development of the Academic Staff in the Republic of Bulgaria https://www.lex.bg/laws/ldoc/2135696665</p> <p>Regulations on the Conditions and Procedure for Acquiring Scientific Degrees and Holding Academic Positions in the Bulgarian Academy of Sciences: http://old.bas.bg/ общо-събрание/приети-</p>

¹ <http://ec.europa.eu/euraxess/index.cfm/services/researchPolicies>

					<p>документи/220-правилници/7147-правилник-за-условията-и-реда-за-придобиване-на-научни-степени-и-за-заемане-на-академични-длъжности-в-бан</p> <p>Regulations on the Conditions and Procedure for Holding Academic Positions in IPHS at BAS: https://www.iphs.eu/n/2013-05-07-14-16-36/документи.html</p> <p>Rules for the Work of The Scientific Juries for Holding Academic Positions in IPHS at BAS: https://www.iphs.eu/n/2013-05-07-14-16-36/документи.html</p> <p>All documents for OTM-R procedures are available at: https://www.iphs.eu/n/en/2013-05-07-14-16-36/%D0%B4%D0%BE%D0%BA%D1%83%D0%BC%D0%B5%D0%BD%D1%82%D0%B8.html</p>
3. Is everyone involved in the process sufficiently trained in the area of OTM-R?	x	x	x	++ Yes, completely	<p>The staff is informed about the main principles in the area of OTM-R which are embedded in related legislation and the normative documents of the Institute. Additionally, personal consultations are provided by the HR officer. All documents for OTM-R procedures are available at: https://www.iphs.eu/n/en/2013-05-07-14-16-36/%D0%B4%D0%BE%D0%BA%D1%83%D0%BC%D0%B5%D0%BD%D1%82%D0%B8.html</p>
4. Do we make (sufficient) use of e-recruitment	x	x		-/+ Yes, substantially	According to the Law on the Development of

tools?					<p>the Academic Staff in the Republic of Bulgaria, all procedures for recruiting researchers must be published in the State Gazette (https://dv.parliament.bg/DVWeb/index.faces) and on the IPHS website in the section "Competitions"/"Competitions for academic positions"/"Current competitions": https://www.iphs.eu/n/2013-05-07-14-16-36/2013-05-07-14-22-41.html</p> <p>Archive of conducted competitions: https://www.iphs.eu/n/2013-05-07-14-16-36/2013-05-07-14-23-06.html</p> <p>In the next stage we plan also to publish also in Jobs.bg (largest job e-portal in Bulgaria) and EURAXESS pan-European portal that supports mobility and career development of researchers.</p> <p>Measurement indicators: Number of announced academic positions and online applications via e-platforms.</p>
5. Do we have a quality control system for OTM-R in place?	x	x	x	++ Yes, completely	<p>The submitted documents are checked by a Commission that includes of the Head of Department, the Scientific Secretary and the Head of the Research Unit. The selection of the candidates, participating in the competition is checked by a Scientific Jury appointed for each specific competition. The members of the Scientific Jury prepare reviews on the works of the candidates for the "Associate Professor" or "Professor" position. At the selection for the</p>

					<p>position of “Chief assistant professor” the candidates have an interview with the members of the Scientific Jury. In all procedures, each member of the Scientific Jury evaluates positively or negatively each of the candidate. The protocols from the meetings of the Scientific Jury include information on the voting of the members. The minutes are signed by all members of the Jury: http://www.iphs.eu/n/2013-05-07-14-16-36/2013-05-07-14-23-06.html</p> <p>The final decision and the outcome from the competitions is sent to the Information and Documentation Center of the Ministry of Education and Science, which carries out quality control of the procedures at the national level https://ras.nacid.bg/dissertations-search .</p> <p>IPHS publishes open vacancies on its website under the heading "Competitions"/ "Competitions for academic positions" https://www.iphs.eu/n/2013-05-07-14-16-36/2013-05-07-14-22-41.html</p> <p>Measurement indicator: The person in charge of each selection procedure ensures effective compliance with OTM-R principles and sends a report to the Scientific Council of IPHS.</p>
6. Does our current OTM-R policy encourage external candidates to apply?	x	x	x	<i>+/-Yes, completely</i>	<p>IPHS publishes all vacancies for academic jobs on its website in a section ‘Competitions’ http://www.iphs.eu/n/konkursi/2013-05-07-08-51-53.html The procedures are open to candidates outside of the IPHS as well.</p>

					Measuring instrument: Number of people from outside of IPHS applying for research positions in a given year compared to the total number of people applying for research positions in a given year (%).
7. Is our current OTM-R policy in line with policies to attract researchers from abroad?	x	x	x	<i>-/+ Yes, substantially</i>	<p>The interest of foreign researchers to apply for an academic position in the Institute is small but it has been increasing in the recent years. We believe that this trend will continue since there was the substantial increase of the remuneration the latest year, esp. for the young researchers.</p> <p>The calls for the recruitment of PhD students and of researchers on different e-portals are evidence of compliance with such policy. All calls for academic and PhD positions are publicly available on the website of the Institute.</p> <p>Measuring indicator: Number of people from external institutions and abroad applying for research positions in a given year compared to the total number of people applying for research positions in a given year.</p>
8. Is our current OTM-R policy in line with policies to attract underrepresented groups?	x	x	x	<i>++ Yes, completely</i>	<p>The share of female applicants and the female employees is higher in IPHS. The policies of IPHS and BAS related to support of gender equality comply with the Anti-Discrimination Act, which prohibits discrimination based on sex, race, nationality, ethnicity, human genome, citizenship, national origin, religion or belief,</p>

					<p>education, political affiliation, personal or social status, disability, age, sexual orientation, marital status, property status or any other characteristics: https://www.lex.bg/laws/ldoc/2135506845</p> <p>The Institute has also an Internal regulation on equality, equal opportunities and protection against discrimination: http://www.iphs.eu/n/images/stories/venera/Diskriminacia.pdf</p> <p>IPHS follows also the Plan to promote equality between women and men at BAS https://www.iphs.eu/n/images/normative-docs/Plan_ravenstvo_BAS_2022.pdf</p> <p>Measuring indicators: Trend of the participation of candidates from underrepresented group applying for work at IPHS.</p>
<p>9. Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers?</p>	<p>x</p>	<p>x</p>	<p>x</p>	<p><i>++ Yes, completely</i></p>	<p>Recruitment competitions are public, with the aim to attract more candidates and keep employees of IPHS. By providing a positive atmosphere for career development and favorable conditions of the working physical and virtual environment, the scientists at IPHS, as well as those who are now applying, are attracted to work in the Institute.</p> <p>Measuring indicator: We plan to draw up a questionnaire on the satisfaction to all researchers once a year in order to monitor their degree of satisfaction with working</p>

					conditions.
10. Do we have means to monitor whether the most suitable researchers apply?				<i>++ Yes, completely</i>	The selection and evaluation of the staff is carried out by Scientific Juries, in which external members (from other universities or research organizations) participate. The members of the Scientific Jury prepare reviews about the work and the achievements of each candidate. The reviews are published on the website of the Institute for access by interested parties. If there are no objections, the Scientific Jury makes a final decision about the applications. The most suitable candidate is selected based on the specific requirements of the job position and the normative national minimal academic criteria: https://nacid.bg/bg/ . The announcements of all recruitment procedures are present on the website of IPHS in the section "Competitions"/"Archive" section: https://www.iphs.eu/n/2013-05-07-14-16-36/2013-05-07-14-23-06.html
Advertising and application phase					
11. Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?	x	x		<i>+/-Yes, completely</i>	The templates are prepared in accordance with the Law on the Development of the Academic Staff in the Republic of Bulgaria, the Regulations for the Implementation of this Law, as well as the Regulations for the Terms and Conditions for Occupying Academic Positions at IPHS. https://www.iphs.eu/n/2013-05-07-14-16-36/%D0%B4%D0%BE%D0%BA%D1%83%D0%BC%D0%B5%D0%BD%D1%82%D0%B8.html
12. Do we include in the job advertisement	x	x		<i>-/+ Yes, substantially</i>	The announced academic positions include

references/links to all the elements foreseen in the relevant section of the toolkit? [see Chapter 4.4.1 a) of the OTM-R expert report ²]					most of the elements from chapter 4.4.1 of the REPORT of the WORKING GROUP of the STEERING GROUP of HUMAN RESOURCES MANAGEMENT under the EUROPEAN RESEARCH AREA on Open, Transparent and Merit-based Recruitment of Researchers’.
13. Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?	x	x		-- No	There are no job adverts posted on EURAXESS portal. We plan to publish all calls for PhD and academic positions in EURAXESS and other e-platforms in accordance with the requirements of the national legislation.
14. Do we make use of other job advertising tools?	x	x		-- Yes, substantially	All announcements of academic positions are published on the website of IPHS in the section "Competitions"/"Archive" section: https://www.iphs.eu/n/2013-05-07-14-16-36/2013-05-07-14-23-06.html Some of the announcements are published also in Jobs.bg (the biggest job portal in Bulgaria) and in mailing lists of professional organizations such as the Bulgarian Association of Psychology. Additional recruitment tools increasing the chances of researcher mobility. Measurement indicator: Number of calls posted on EURAXESS and other e-portals.
15. Do we keep the administrative burden to a minimum for the candidate? [see Chapter 4.4.1 b) ⁴⁵]	x			++ Yes, completely	The requirement is according to the Law on the Development of the Academic Staff in the Republic of Bulgaria, the Regulations for the

² <http://ec.europa.eu/euraxess/index.cfm/services/researchPolicies>

					Implementation of this Law and the Regulations for Holding of Academic Positions in IPHS: https://www.iphs.eu/n/2013-05-07-14-16-36/%D0%B4%D0%BE%D0%BA%D1%83%D0%BC%D0%B5%D0%BD%D1%82%D0%B8.html
Selection and evaluation phase					
16. Do we have clear rules governing the appointment of selection committees? [see Chapter 4.4.2 a) ⁴⁵]		x	x	<i>++ Yes, completely</i>	<p>The composition of the Scientific Jury is proposed by the Research unit or the head of the Department of IPHS for which announced competition. The Scientific Jury is approved by the Scientific Council of the Institute. The Director prepares an order for the opening of a completion.</p> <p>Measurement indicator: Updates of the guidelines for appointment and selection of employees at IPHS-BAS.</p>
17. Do we have clear rules concerning the composition of selection committees?		x	x	<i>++ Yes, completely</i>	<p>Written guidelines in the Law on the Development of the Academic Staff in the Republic of Bulgaria, the Regulations for the Implementation of this Law, as well as the Regulations for the Terms and Conditions for Holding Academic Positions in IPHS-BAS. https://www.iphs.eu/n/2013-05-07-14-16-36/%D0%B4%D0%BE%D0%BA%D1%83%D0%BC%D0%B5%D0%BD%D1%82%D0%B8.html</p> <p>The Scientific Jury for assistant professor includes five members of the Scientific jury who must be professors or/and associate professors. At least two of them should be external to the Institute. The Scientific Jury for an associate professor and professor position includes seven</p>

					members. At least four of them must be professors and at least three of the members must be external to the Institute. This requirement is stipulated in the Law on the Development of the Academic Staff in the Republic of Bulgaria, the Regulations for the Implementation of the Law and the Regulations for Holding of Academic Positions in IPHS: https://www.iphs.eu/n/2013-05-07-14-16-36/%D0%B4%D0%BE%D0%BA%D1%83%D0%BC%D0%B5%D0%BD%D1%82%D0%B8.html
18. Are the committees sufficiently gender-balanced?		x	x	<i>++ Yes, completely</i>	The members of the Scientific Juries are selected on the basis of their academic position, competences and qualifications in the scientific field for which the competition is announced, and not on the basis of gender.
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	<i>++ Yes, completely</i>	The guidelines are present in the Rules for the work of the Scientific Juries for occupying academic positions at IPHS – BAS: https://www.iphs.eu/n/images/normative-docs/Pravila%20IPHS%20Juri_2022.pdf
Appointment phase					
20. Do we inform all applicants at the end of the selection process?		x		<i>++ Yes, completely</i>	According to the Law on the Development of the Academic Staff in the Republic of Bulgaria, candidates are informed by an official letter for their admission or non-admission /motivated explanation of why they were not admitted/. At a later stage they are informed also about the results of the competition. Letters are received in person against signatures and the date of receipt of the letter.

21. Do we provide adequate feedback to interviewees?		x		++ Yes, completely	Yes, by phone, email and by official letters.
22. Do we have an appropriate complaints mechanism in place?		x		++ Yes, completely	There is an appropriate complaints mechanism. Every candidate can file a complaint, which is filed with a number and is evaluated by a Special Committee. Measurement indicator: Number of filed complaints.
Overall assessment					
23. Do we have a system in place to assess whether OTM-R delivers on its objectives?				-- No	We plan to draw up survey on researchers' satisfaction with the implementation of the OTM-R Policy in IPHS. The results from this survey will presented on a seminar and will be published on the website of the Institute. Measurement indicator: Assessment of the implementation of the OTM-R Policy. Report with survey results.

Team Group for HRS4R in the IPHS at BAS 15/8/22