HR Excellence in Research

Interim Assessment: EC Consensus Report

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Case number

2019PT418976

Name Organisation under assessment

Champalimaud Foundation

Organisation’s contact details

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Submission date of the Interim Assessment Internal Review

19/10/2022

Submission date to the European Commission

28/11/2022

Quality assessment

This section assesses the level of ambition and the intended quality of progress.
Please rate the following queries as 'yes', 'no', or 'partly'. For any items marked 'no' or 'partly', please suggest how they could be improved.

	YES / NO / PARTLY	Recommendations
Has the organisational information been sufficiently updated to understand the context in which the strategy for the implementation of the principles of the EuropeanCharter for Researchers is implemented?	Yes	
Does the narrative provided list goals and objectives which clearly indicate the organisation’s priorities in HR management for researchers?	Yes	
Has the organisation published an updated strategy for the implementation of the principles of the European Charter for Researchers and the action plan with the actions’ current status, additions and/or modifications?	Yes	
Is the execution of the strategy for the implementation of the principles of the European Charter for Researchers and the action plan sufficiently embedded within the organisation’s management structure (e.g. steering committee, operational responsibilities) so as to guarantee a solid implementation?	Yes	A strong governance structure is in place. The Working Group and Steering Committee remain with roughly the same constitution as during the proposal stage.
Has the organisation developed an OTM-R policy?	Partly	Under development

Strengths and weaknesses

On the basis of the information submitted and taking into account the organisation’s national research context, how would you rate the strengths and weaknesses of the strategy for the implementation of the principles of the European Charter for Researchers? (max. 1000 words)

As an organisation Champalimaud Foundation remains very much on track with the successul and comprehensive implementation of the HRS4R process. This has not been an easy phase given the disruption of the Covid-19 pandemic. Praise should be given for the continued success. I look forward to seeing the fruits of the HRS4R labour and the subsequent developments that stem from these.

To illustrate this progress, the following (in bold) were recommendations made during the initial implementation phase, and the progress made (in italics), all of which is of a high standard, and demonstrates how HRS4R has been embedded in the Champalimaud Foundation:

1. Targets and Indicators would benefit, where appropriate, from more quantitative metrics. This will allow for a better assessment in the future of whether an action has been 'successful' or not.

A number of actions have 'Newly defined targets and indicators' This is particularly evident in the Gender Equality Plan "Attracting Talent" which has a range of specific goals to “reach gender balance in senior positions” and to “ensure equitable pay for equal function”. These goals are assessed on the basis of clear and quantifiable metrics, targets and indicators.

2. Gender balance: Champalimaud Foundation must devise and implement more specific actions in the action plan in order to achieve a higher representation of women in decision-making and advisory bodies. Such that 30% female representation in R3-R4 positions could be improved as it is explained at the Gap analysis.

The development of a focussed Gender Equality Plan (GEP) for the entire institution (research + clinic) was prioritised and published successfully in December 2021: https://fchampalimaud.org/sites/default/files/pdf/GEPV2Feb2022.pdf

3. The Action Plan should be more visible. A specific and dedicated web page should be set up. (Please remedy this within the next month)

The HRS4R page is now clearly visible, however the HRS4R logo is not included as far as I can see. The 'follow our progress' link was not working at the time of the external review' It also appears at the end of the 'Supports' page.

4. More effort should be put in place to convert policy formalisation into more concrete actions. The size of the institution allows effective communication and engagement at all levels.

Policy development constitutes significant initial tasks at the start of the implementation phase. Researchers at all levels of the research career, and across the organisation are included in, or have access to relevant HRS4R information.

If relevant, please provide suggestions for modifications or revisions to the (updated) strategy for the implementation of the principles of the European Charter for Researchers (max. 2000 words).

None applicable. No revisions required. Keep up the great work!

At this point of the interim assessment, the organisation does not risk losing the HR award. Nevertheless, the organisation is advised to take into account the comments and recommendations of the assessors to meet all assessment criteria at the next assessment (in 36 months).

Recommendations

Which of the below situations describes the organisation's progress most accurately? Tick the right situation and add comments / general recommendations accordingly.

- **HR Excellence in Research embedded** (●)
- **HR Excellence in Research embedded, corrective actions needed** ( )
- **HR Excellence in Research embedded, strong corrective actions needed** ( )

Additional comments *

- Please insert the HRS4R logo on the appropriate page on the Champalimaud Foundation website
- Please update link to the HRS4R Progress section
- The Gender Action Plan and related working group is a welcome addition.

Explanation

- **HR Excellence in Research embedded**
  The organisation is progressing with appropriate and quality actions as described in its action plan. **There is evidence that the HR Excellence in Research is further embedded.**
- **HR Excellence in Research embedded, corrective actions needed**
  The organisation is, for the most part, progressing with appropriate and quality actions, as described in its action plan, but could benefit from alterations as advised through the assessment process. **There is some evidence that the HR Excellence in Research is further embedded.**
- **HR Excellence in Research embedded, strong corrective actions needed**
  The organisation is not deemed to be implementing appropriate and quality actions, and this raises some concern for future efforts to implement actions closely aligned to the European Charter for Researchers. **There is a lack of evidence that the HR Excellence in Research is further embedded.**