How to organize for the HR award renewal with an on-site visit
The experience of University of Montpellier

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HRS4R Info Day, Brussels
18 October 2022
Summary

1. University of Montpellier: key facts and figures
2. Phases and timeline of renewal with on-site visit
3. Tips to organize the on-site visit
   - Plan, prepare, rehearse
   - Before, during and after the on-site visit
University of Montpellier: key facts and figures

### Unique features for global outreach

- **Created by merger** of Universities Montpellier 1 & 2 (January 2015)

- **Exceptional world-acclaimed historical heritage (800 years old):** oldest European faculty of medicine, France’s oldest botanical garden, Herbarium, Conservatory of Anatomy, Pharmacy museum, and more

- **Multi-disciplinary university** with “Health focus”

- **16 faculties, schools, and 72 research structures**
University of Montpellier: key facts and figures

Meeting the needs of tomorrow’s demanding careers

- 50,000 students of which
  - 18% come from abroad
  - 35% on scholarship

- 2 educational domains for initial, continued and apprenticeship training
  - Science, technology, health
  - Law, economics, management

- Market penetration rate above 90%

Disciplines

<table>
<thead>
<tr>
<th>Law-Econ-Management</th>
<th>Health</th>
<th>Science &amp; Technology</th>
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<tbody>
<tr>
<td>Business management</td>
<td>Medicine</td>
<td>Biology</td>
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<tr>
<td>Law</td>
<td>Pharmacy</td>
<td>Science</td>
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<td>Education</td>
<td>Dentistry</td>
<td>Chemistry</td>
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<td>Economics</td>
<td>Majeutic</td>
<td>Physics</td>
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<tr>
<td>Accounting</td>
<td>Speech therapy</td>
<td>Computer science</td>
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<td>Management</td>
<td>Eye therapy</td>
<td>Engineering</td>
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<tr>
<td>Political science</td>
<td>Audio prosthesis</td>
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</tr>
<tr>
<td></td>
<td>Athletics &amp; physical education</td>
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</tbody>
</table>

- 600 diplomas

<table>
<thead>
<tr>
<th>Duration</th>
<th>Program</th>
</tr>
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<tbody>
<tr>
<td>1-2 years</td>
<td>DU (university degree)</td>
</tr>
<tr>
<td></td>
<td>DUT (technical university degree)</td>
</tr>
<tr>
<td>3 years</td>
<td>Master's degree (1 &amp; 2)</td>
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<tr>
<td>4-5 years</td>
<td>Doctoral degree</td>
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<td>&gt; 5 years</td>
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Human resources diversity at the heart of our projects

- 4,800 staff
  - Permanent (tenured) staff: 3,000
  - Contract-based staff: 1,800

- Of which 2,900 staff in research area
  - Research-Professors
  - Researchers
  - PhD students and Post-doctoral researchers
  - Engineers – Technicians – Administrative staff
  - Librarians

- Over 4,700 hosted staff*: personnel from National Research Organizations in JRUs

*A unique French feature: research is carried out in universities via strong partnerships with National Research Organizations within Joint Research Units (JRU)
History of HR Excellence in Research at UM

- Award received in March 2015
- Underwent the award renewal process in 2020-2021
- Award successfully renewed in June 2021 (for 3 years)

Today, an additional 56 French institutions have received the HR award (57 French organizations in total)
2 /// Phases and timeline of on-site visit

- Life cycle of HR Excellence in research award
- On-Site visit is every 6 years

HRS4R - moving towards QUALITY
2 /// Phases and timeline of on-site visit

First, you’ll need to file a self-assessment report similar the mid-term assessment.

The award renewal assessment comprises 3 phases:

1. Administrative eligibility check by EC
2. A desk-based assessment of the internal review
3. A site visit to the institution

Technical guidelines for institutions are available on Euraxess website.

* HRS4R EC-designated experts cannot be nationals of your country. They must remain free of conflicts of interest with the applicant institution.
2 /// Phases and timeline of on-site visit

1 month

Renewal report filed with EC

EC check for administrative eligibility
EC appoints 3 HRS4R experts
It is helpful to communicate a tentative date for site-visit at time of filing
Lead assessor contacts the applicant institution via email to schedule the visit

3-4 months

Desk-assessment by experts

Experts review all documents (initial, mid-term and renewal reports)
Assess embedding of the HRS4R process, level of ambition and progress
Each assessor writes an individual assessment form
List possible questions to address during visit

On-site visit by experts

Over 1 or 1 ½ day
Series of meetings with stakeholders: management, researchers, HRS4R practitioners
Write a consensus report

1 month

Results

Published on E-tool by EC

3 possible results
Accepted (no changes)
Pending minor modifications (2 months to file a revised report)
Pending major modifications (12 months to file a revised report)
Tips to organize the on-site visit

Plan, communicate, prepare, rehearse

**Plan**
- Verify top management availability; book agendas
- Draft a program, propose 1 or 2 dates
- Liaise with lead assessor and stakeholders
- Reserve rooms, breaks and meal, prepare documents, book translation services

**Communicate**
- Brief all stakeholders well in advance (at report time and after)
- Inform participants of audit date; share meeting program
- Invite stakeholders to preparation meetings (at least 2)
- Send stakeholders all relevant documentation in advance

**Prepare**
- Prepare your briefing meetings with each group
- Review documentation & HR excellence history with them
- Draft contents of presentation or discussion topic
- List possible questions by assessors and prepare answers

**Rehearse**
- Finalize presentations or material for discussion
- Go over contents of presentations/discussion topics; assign roles
- Schedule 1 rehearsal session for each group
- Carry out mock sessions in real conditions (live, 30', play assessor...)

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### A typical on-site visit agenda

<table>
<thead>
<tr>
<th>TIME</th>
<th>WHO AND WHAT</th>
<th>WHY</th>
<th>WHERE</th>
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<tbody>
<tr>
<td>9 - 9.30</td>
<td>Introduction by the lead expert</td>
<td>- Inform on how the HRS4R is embedded in the organization and highlight progress and quality in implementing the C&amp;C principles</td>
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<tr>
<td></td>
<td>Presentation by the Institution</td>
<td>- Discuss challenges faced by the institution in implementing the C&amp;C principles due to external constraints (e.g. national context and legislation)</td>
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<td></td>
<td></td>
<td>- The most important purpose is to introduce the external experts to the invited stakeholders and participants of the site visit and vice versa. However, it is also an opportunity to present your institution to the external experts.</td>
<td></td>
</tr>
<tr>
<td>09.30 - 9.45</td>
<td>Meeting with ..........</td>
<td>- Get an overview of the Institution</td>
<td></td>
</tr>
<tr>
<td>9.45 - 10.00</td>
<td>Experts meeting/ reserved discussion</td>
<td>- To assess the information provided</td>
<td>To occur after each meeting</td>
</tr>
<tr>
<td></td>
<td>Meeting with ...</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Meeting with ...</td>
<td></td>
<td></td>
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<tr>
<td>17.30</td>
<td>Debriefing meeting Assessment Team alone</td>
<td>Exchange impressions, discuss if further information/clarification is needed</td>
<td></td>
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<tr>
<td>18.00</td>
<td>Meeting with Institution leadership</td>
<td>A short presentation by lead expert with some feedback, thank everybody for the cooperation and fruitful discussions Collect feed-back and recommendations for the future</td>
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**Remember!**

- **Top stakeholders participation is required** in opening and closing meetings
- **Opening meeting is longer than others** (30’ presentation + 15’-30’ Q/A)
- **Schedule private debriefing sessions** for assessors (15’ after each meeting; 30’ prior to final feedback session)
- **HRS4R coordinator not present in confidential meetings** (except if confidential meeting scheduled with the institution’s HRS4R team itself)
3 // Tips to organize the on-site visit

**BEFORE the on-site visit**

- **Draft a meeting agenda with breaks** (it’s hard to carry out meetings without a pause): mid-morning, lunch, afternoon

- **Book a room nearby where experts can retreat** (or arrange for participants to vacate the meeting room at the end of every meeting to allow the assessors 15mn to confer privately)

- **Order** snacks, drinks, and provide lunch for the assessors

- **Prepare and send information** on your organization’s strategy, the detailed organization chart, a list of involved stakeholders

- **Offer help in organizing the assessors’ stay**: directions to your campus, information on transportation, booking hotels nearby but let them cover their own accommodation costs

- **Stay close-by** during confidential meetings you cannot attend, just in case your colleagues need you...
3 // Tips to organize the on-site visit

**DURING the on-site visit: assessors will look to**

- **Confirm the impression they got from their desk-based assessment** (and get answers to questions they might have)

- **Collect evidence of HRS4R embedding in institution** (find out how much the stakeholders know about HRS4R, about the award, how researchers are involved in the process, how information circulates, etc...)

- **Verify that OTM-R is in** (the process of being in) place

- **Judge the level of ambition** of the institution’s HR strategy for researchers

- **Judge the institution’s efforts** to ensure the C&C principles

- **Prepare binders or files with evidence of HRS4R implementation**

- **Remember: exchanges with auditors cannot be recorded**
3 // Tips to organize the on-site visit

**AFTER the on-site visit**

- **First feedback** given by assessors in last meeting of the day (not the results)

- **Assessors will confer and write a Consensus report** with results on the institution’s HR strategy’s strengths and weaknesses and recommendations when applicable

- **Assessors send the Consensus report to the EC**

- **Final results will be communicated by the EC** (RTD-Chapter team) via the Euraxess e-tool (under your case number):
  - Accepted
  - Pending minor revisions
  - Pending major revisions*  

*In case of Pending with Major Revisions, the use of the HR award logo is forbidden*
Thank you for your attention

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