

TEMPLATE A: INITIAL EXTERNAL ASSESSMENT of HR STRATEGY

Name Organisation under assessment:
Organisation's contact details:
Submission date initial GAP-analysis, HR Strategy and Action Plan:

Name Assessor1 (lead):	Date:
Name Assessor2:	Date:
Name Assessor3:	Date:

GENERAL ASSESSMENT

Accepted	Accepted pending minor alterations	Declined pending (major) revisions
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This assessment is composed in consensus by the assessors on (date).....

DETAILED ASSESSMENT

1. ELIGIBILITY ASSESSMENT

	YES	NO (or no evidence)
Has the organisation formally endorsed the Charter and Code?		
Have the Strategy and Action Plan been published on the organisation's website?		
Have the following elements of the templates for the Gap Analysis and the HR Strategy and Action Plan been completed? A. Gap Analysis B. HR Strategy and Action plan: B1. Organisational information B2. Narrative B3. Actions B4. Implementation		
Have the Strategy and Action Plan been formally endorsed by the organisation's highest authority?		

2. QUALITY ASSESSMENT

The quality assessment evaluates the level of ambition and the **quality of progress** intended by the organisation.

	YES	NO
Is the organisational information provided sufficient to understand the context in which the HR Strategy is designed?		
Is the Action Plan coherent with the Gap Analysis?		
Have a steering committee and working group been established to guarantee the implementation of the HRS4R-process?		
Has the research community been sufficiently involved in the process, with a representation of all levels of a research career?		
Are the relevant management departments sufficiently involved in the process so as to guarantee a solid implementation?		
Have adequate targets and indicators been provided in order to demonstrate when/how an action will be/has been completed?		
Is the organisation establishing an OTM-R policy?		
Are the goals and ambitions sufficiently ambitious considering the context of the organization?		

RECOMMENDATIONS

If any of the above statements have prompted a “no” in the evaluation, please provide suggestions for (minor) alterations or (major) revisions, in order to qualify for the HRS4R award.

If the organisation deserves to be commended on their ambition, their actions, evidence of good practice and/or their implementation process, please provide a commentary supporting this.