

# ISEA PAS

## HUMAN RESOURCES STRATEGY FOR RESEARCHERS

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

INTERNAL REVIEW



HR EXCELLENCE IN RESEARCH

Cracow, 2023

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## **BASIC INFORMATIONS**

Name Organisation under review:

Institute of Systematics and Evolution of Animals of the Polish Academy of Sciences

Organisation's contact details:

e-mail: [office@isez.pan.krakow.pl](mailto:office@isez.pan.krakow.pl) Phone: (+48 12) 422 19 01

Web-link to published version of organisation's HR Strategy and Action Plan:

<http://www.isez.pan.krakow.pl/en/hr-excellence-in-research.html>

Web-link to organisational recruitment policy (OTM-R principles):

<http://www.isez.pan.krakow.pl/en/hr/open-transparent-and-merit-based-recruitment-regulation-of-the-manner-and-mode-of-holding-competitions-for-candidates-for-academic-positions-at-the-ISEA-PAS.pdf>

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2019PL436037

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05/09/2023

## 1. ORGANISATIONAL INFORMATION

<b>STAFF &amp; STUDENTS</b>	<b>FTE</b>
Total researchers = staff, fellowship holders, bursary holders, PhD. students either full-time or part-time involved in research	<b>55</b>
Of whom are international (i.e. foreign nationality)	<b>4</b>
Of whom are externally funded (i.e. for whom the organisation is host organisation)	<b>11</b>
Of whom are women	<b>27</b>
Of whom are stage R3 or R4 <sup>1</sup> = Researchers with a large degree of autonomy, typically holding the status of Principal Investigator or Professor.	<b>19</b>
Of whom are stage R2 = in most organisations corresponding with postdoctoral level	<b>13</b>
Of whom are stage R1 = in most organisations corresponding with doctoral level	<b>12</b>
Total number of students (if relevant)	<b>10</b>
Total number of staff (including management, administrative, teaching and research staff)	<b>72</b>
<b>RESEARCH FUNDING (figures for most recent fiscal year)</b>	<b>€</b>
Total annual organisational budget	<b>2 809 974,63</b>
Annual organisational direct government funding (block funding, used for teaching, research, infrastructure,...)	<b>1 600 887,01</b>
Annual competitive government-sourced funding (designated for research, obtained in competition with other organisations – including EU funding)	<b>1 209 087,62</b>
Annual funding from private, non-government sources, designated for research	<b>0</b>
<b>ORGANISATIONAL PROFILE</b> (a very brief description of your organisation, max. 100 words)	
<p>The Institute of Systematics and Evolution of Animals Polish Academy of Sciences was established in 1989 from the Department of Systematic and Experimental Zoology PAS. The Natural History Museum is an integral part of the Institute. The Institute's research combines traditional systematics of contemporary and extinct animals with modern scientific disciplines, such as genetics, archaeozoology, ecology, and related research on the evolution and biodiversity of animals. It also houses a scientific zoological collection with over 2 million, specimens of fossil and contemporary vertebrates and invertebrates, many of which are unique.</p>	

<sup>1</sup>[http://ec.europa.eu/euraxess/pdf/research\\_policies/Towards\\_a\\_European\\_Framework\\_for\\_Research\\_Careers\\_final.pdf](http://ec.europa.eu/euraxess/pdf/research_policies/Towards_a_European_Framework_for_Research_Careers_final.pdf)

## 2. STRENGTHS AND WEAKNESSES OF THE CURRENT PRACTICE

### ETHICAL AND PROFESSIONAL ASPECTS

#### **Strengths and Weaknesses (Interim Assessment)**

*The major weakness the initial assessment phase were gaps in employees' knowledge about the Charter and Code. The ISEA PAS pass on the knowledge by ISEA PAS' website, during the ISEA PAS' seminars for researchers etc.*

*The major strengths the initial assessment phase were regulations and documents provided by Polish Academy of Sciences as the parent organization. ISEA PAS already has complied with the internal regulations: Regulations of using results of intellectual work originated in ISEA PAS, Guidelines for the assessment of professional effectiveness of the academic staff of the ISEA PAS,*

*The new priority is to create and implement the Data Management Plan.*

#### **Strengths and Weaknesses (Award Renewal, max 500 words)**

##### **Strengths**

At ISEA PAS, ethical and professional principles are implemented. The Institute guarantees all research staff the freedom to conduct research. All employees comply with the ethical principles set out in the Code of Ethics for Researchers, approved by the General Assembly of PAS, the Code of Ethics for PhD students, the European Charter for Researchers, the European Code of Conduct for Research Integrity (All European Academies), The Code of the National Science Centre on Research Integrity and Applying for Research Funding and The Good practices in review procedures in science, recommended by the Ministry of Science and Higher Education. The results of internal surveys from 2016 and 2023 indicate the continued high adherence to ethical standards in research conducted at ISEA PAS.

Successful efforts have been made to improve the accessibility of documents and introduce official communication in English, considering the growing number of PhD students and staff members from abroad (3 in 2016 and 5 in 2022 and more in years ahead considering that in 2023 additional 2 foreign PhD students, 2 postdocs were hired, also foreign interns are observed, each year at least 2 people).

Our researchers significantly impact science, publishing papers with high IF (2020 – 138.8, 2021 – 310.4, 2022 – 261.2). They are recognized in the community, which is reflected in the number of publication citations (2020: number of employees N=37, number of citations C=9 608; 2021: N=39, C=13 014; 2022: N=39, C=14 575). In 2020-2022 they collaborated with scientists from 37 countries. The Institute's researchers supervise also PhD students (2020 – 11, 2021 – 17, 2022 – 19) and interns (2020-13, 2021-12, 2022-16). Our employees participate in popular science events, such as the Biologists' Night (2020 – 8 activities (e.g. lectures, workshops), 2022 – 19), and share knowledge through popular science papers (2020 – 4, 2021 – 4, 2022 – 2), interviews on TV and radio (2020 – 5, 2021 – 5, 2022 – 6). The Institute's employees are recognized experts in their fields, giving opinions on e.g. grants, projects for nature protection areas, and identifying animals or their remains for various purposes (2020 – 28 cases, 2021 – 19, 2022 – 26).

##### **Weaknesses**

The knowledge and awareness of the Institute's employees regarding the Charter and Code (C&C) principles is still limited and corrective actions need to be taken in this regard. The Institute has limited financial resources to provide training and workshops related to scientific skills, and human resource management. Unfortunately, we were unable to introduce an additional reward system for achievements in obtaining externally funded projects or mentoring, and other assignments planned in 2016. We analyzed the possibilities of its implementation, but it would be very difficult and more time is needed to find the best solution. Researchers and PhD students of the Institute do not have sufficient support from the relevant administrative and technical units, especially the Public Procurements Office and

IT Administration. We believe that the personnel changes already introduced in administrative positions can improve these issues.

### **Remarks (max 500 words)**

One of the most important goals of the Institute is to increase the knowledge of the Institute's employees about C&C. The research activity evaluation system will be analyzed in detail, especially in the context of the opinions of the Institute's employees expressed in the surveys, and appropriate action will be taken.

In the coming year, we plan to launch a new Institutional Repository. This will not only improve the cooperation between the Institute's employees but also with external scientists and enable easy access to publications, data, and projects.

The new Institute's website is under construction, and its goal is to improve the visibility and accessibility of information about ISEA PAS. We are also developing a Data Management Plan to help the manage the data collected from increasing number of grants awarded to ISEA PAS employees and from two national projects regarding digitalization of scientific zoological collections.

The main obstacles that impacted our ability to achieve planned assignments within the given timeframe were the 2018 reform of the national system of higher education and science in Poland, the COVID-19 pandemic, the war in neighboring Ukraine, and the economic crisis. The 2018 reform of the national system of higher education and science in Poland imposed many changes, some of them requiring significant work, such as the preparation of rules for periodic evaluation of research activity, or substantial changes in the system of doctoral education.

The present C&C Implementation Team, responsible for preparing the documentation for the evaluation has caught up with most of the planned assignments and is working constantly to manage the implementation of proposed correction activities.

## **RECRUITMENT AND SELECTION**

### ***Strengths and Weaknesses (Interim Assessment)***

*The first strengths after the initial assessment phase is the creation and implementation of Open, Transparent and Merit-Based Recruitment Regulation of the manner and mode of holding competitions for candidates for academic positions at the ISEA PAS.*

### **Strengths and Weaknesses (Award Renewal, max 500 words)**

#### **Strengths**

The Act on the Polish Academy of Sciences and internal, recently updated regulations are valid in ISEA PAS (e.g., Regulations on the manner and mode of conducting competitions for a scientific position at ISEA PAS, Regulations on the recruitment of non-scientific employees, Rules of admission to the Doctoral School). The mentioned documents, defining the recruitment process, are compliant with the rules of the Charter for Researcher and the Code of Conduct for the Recruitment of Researchers and the requirements of the funders. The recruitment and selection processes are open, transparent, and merit-based, ensuring equal chances for all potential candidates. The recruitment rules for all scientific and technical positions have been changed by introducing a set of documents, which accompanied the introduction of Open, Transparent and Merit-based Recruitment (OTMR) rules. Job offers are published in Polish and English, and not only in the required places, e.g.: Euraxess, the website of the Ministry of Education and Science, the Institute's website, the Bulletin of Public Information (BIP), but also on ResearchGate, EvolDir, the Institute's profile on Facebook and pracuj.pl (the most popular website of job announcements in Poland).

The Gender Equality Plan (GEP) was introduced in August 2023 as an internal regulation aimed at improving the recruitment and selection of candidates and the working conditions of all employees. Candidates are informed about the course of the recruitment process and selection criteria, in accordance with internal regulations. The recruitment results are also published on the public Institute's website.

The very high result in the internal survey confirms the conviction of ISEA PAS employees and PhD students about high standards of recruitment and selection. Nevertheless, we would like to extend the OTMR rules at the Institute, as creating a positive and inclusive work culture it is a high priority for us. We are working on simplifying job offers and internal regulations in accordance with Polish Law. This is planned to be completed by the end of 2023.

### **Weaknesses**

Insufficient funds to raise salaries to a level that will satisfy and attract the best employees is the greatest weakness at ISEA PAS.

### **Remarks (max 500 words)**

By introducing reorganized, open recruitment processes based on transparent regulations, as well as having regard to the comfort and safety of employees provided by GEP, the Institute hopes that this will attract the best talent, making the Institute an even better unit powered by great scientists not only nationally, but also internationally. The change of personnel at the position of HR and Payroll Specialist to an English-speaking person facilitated not only direct contact, but also dealing with formal matters, by translating administrative documentation into English. This facilitates communication not only at the recruitment stage, but also at the hiring stage.

## **WORKING CONDITIONS**

### ***Strengths and Weaknesses (Interim Assessment)***

*The major weakness in and after the initial assessment phase was the housing problem. ISEA PAS is located in two locations, one is rented and one is ISEA PAS property where the ISEA PAS Natural History Museum is located. ISEA PAS has difficulties in finding a new place. The main problem is the deficiency of funds that can be used to purchase a building or even a floor in a building.*

*The major strengths after the initial assessment phase is the Ministry of Science and Higher Education decided to increase salary for researchers and allocated additional funds for this purpose.*

*ISEA PAS deduced do organize a training "Mobbing, harassment and discrimination" for all employees to clarify concepts and present ways of counteracting.*

*The new priority is to save funds for the salary increase for the rest of employees.*

### **Strengths and Weaknesses (Award Renewal, max 500 words)**

#### **Strengths**

ISEA PAS provides a stimulating environment for conducting scientific research and training employees, through membership in scientific societies and cooperation with many national and foreign research centres. After 2016, many changes were introduced at the Institute to improve working conditions. Although the Institute is a small scientific unit, it provides an open and friendly working environment for all employees. The Working Regulations of ISEA PAS and the Gender Equality Plan of ISEA PAS guarantee equal treatment of genders at all career levels, as confirmed by the results of the internal survey.

All employees and PhD students of the ISEA PAS have the flexibility to organize their working hours and to work remotely. These arrangements were implemented as a corrective actions after 2016. They were further strengthened due to the pandemic situation caused by Covid-19. The Institute quickly adapted to the new online tools and methods for working, holding meetings, submitting documents, which are still being used. ISEA PAS is committed to providing a stimulating environment for the conduct of scientific research and training employees.

As a result of new research directions and as part of corrective actions after 2016, new research equipment has been purchased. New research space have also been created: a pre-PCR Laboratory, an Archaeozoology Laboratory, two Ecological Laboratories, an Amber Grinding Laboratory, a cleanroom for ancient DNA and isotopic studies. In the Laboratory of

Molecular Techniques, a research equipment booking calendar has been introduced to ensure equal access for all users.

A group of mentors has been established from among experienced researchers, to support young researchers. The Institute has appointed a mentor for PhD students. Expert advice from the Horizontal Contact Point and the Excellence in Science Department of PAS is provided to employees and PhD students. The scope of duties of employees has been updated, which has been in force since 2023. Work related to public procurement and hardware maintenance has been outsourced to external companies.

At ISEA PAS, there is an appointed employee representative and Gender Equality Officer. The information and consultation body of the Institute is the College, which consists of the heads of the organizational units and the employees representative. The researchers and PhD students have their representatives in the Scientific Council of ISEA PAS, and PhD students also in the Doctoral School and the Council of the Doctoral Studies.

### **Weaknesses**

The Institute still rents space for offices and storage of the scientific collections. The available space limits the ability to create more comfortable working conditions. Due to the economic crisis following the Covid-19 pandemic and the war in Ukraine, as well as limited support from the government authorities, we are not able to increase salaries annually above the statutory minimum. The Institute still does not have strategy for systematic access to careers advice. We have insufficient funds to employ a Development Specialist, to fulfil demands for the career guidance and development expressed by the Institute's employees.

### **Remarks (max 500 words)**

The position of Deputy Administrative Director has been created at the Institute. His/her duties will include: organising, supervising, monitoring and improving of the administrative work related to the research carried out at the Institute. In the near future, an electronic documentation management system will be implemented at the Institute. Despite the difficult financial situation of ISEA PAS, we continue improve the working conditions of our employees. The C&C Implementation Team will make efforts to obtain external financial resources, e.g. from the EU and the Ministry of Education and Science, for the purchase of modern equipment. We also plan to consult and negotiate with local authorities and politicians in order to raise funds for the construction or purchase of a new, modern building to house the Institute.

At ISEA PAS, the institute takes a supportive approach towards scientific career breaks and does not view them negatively. Female employees who are expecting a child and are employed for a predetermined timeframe are guaranteed job security, and the Institute makes arrangements for temporary replacements during their absence. This ensures that upon their return from maternity and parental leave, employees can resume their work with confidence and security. In addition, the Institute plans to implement regulations by the end of 2023, which will allow for the shortening of working hours in accordance with applicable regulations. Furthermore, employees with dependent family members, such as small children or elderly parents in the household, or employees with a disability certificate will have the option of remote work. Tasks that require employees to travel outside their place of residence will not be assigned. The Institute will also offer hybrid seminars to facilitate the participation of individuals with dependent family members in scientific activities at ISEA PAS.

## **TRAINING AND DEVELOPMENT**

### ***Strengths and Weaknesses (Interim Assessment)***

*The greatest strength is that ISEA PAS takes care of maintaining the financial resources for training for employees. Employees know that at any time they can apply for permission to participate in the training which will raise their qualifications. Research Development Specialist regularly provides information on available training, among others STT mobility from the Erasmus+ program.*

### **Strengths and Weaknesses (Award Renewal, max 500 words)**

The Institute recognizes the importance of training and development for employees and PhD students. To this end, an annual internal reporting session of researchers is conducted where the progress of research carried out within Institute statutory activities is presented. Regular seminars are organized and delivered by employees and PhD students, as well as scientists from other national and foreign institutions, to facilitate the exchange of knowledge and opinions on conducted research. Regular departmental meetings were held where experienced colleagues (mentors) joined in to present and discuss research plans and analysis results. The Institute has appointed mentors who are experienced and recognized scientists from all departments to provide additional support for PhD students and young researchers. Employees and PhD students have the opportunity to consult with experts from the Horizontal Contact Point and the Excellence in Science Department of the PAS.

The duties of supervisors and PhD students at ISEA PAS are regulated by Polish Law, as well as by internal arrangements. Experienced scientists at ISEA PAS transfer knowledge to scientists at an early stage of their careers, including PhD candidates, in accordance with the highest standards, and help them discover and develop their scientific potential.

Employees and PhD students of ISEA PAS are kept informed about available opportunities to develop competencies and take advantage of specialist training in hard and soft skills, organised in Poland and other countries of the EU (for this purpose, a special tab has been created on ISEA PAS internal website). These activities are financed by grants, Erasmus+ program and the Institute's own resources. The Institute used the possibility of cooperation with scientists from other institutions (including foreign ones), visiting ISEA PAS as part of bilateral and academic exchange. Also, employees and PhD students participate actively in an average of over 20 national and international conferences every year. The employees and PhD students can participate in training but the Institute's financial possibilities are limited. There are also obligatory training events such as health and safety training, and guidelines before starting work in the molecular or ecology laboratories. Besides, all the employees participate regularly in obligatory coaching on counteracting mobbing and General Data Protection Regulation.

ISEA PAS co-runs the Doctoral Studies and the Doctoral School, together with the Institute of Botany PAS, the Institute of Plant Physiology PAS, the Institute of Nature Conservation PAS and the Institute of Animal Production - National Research Institute, which proves the competence of the Institute's scientists in the field of education and supervision over new generations of scientists.

ISEA PAS has no MSc studies, although researchers share their knowledge and experience with apprentices and interns from Polish and foreign universities and institutes. Some of these students choose the topics of their master's theses on the basis of research in which they participated at the institute under the mentorship of ISEA PAS employees. Several of them continue their career as PhD students or employees in ISEA PAS, and others are supervised by ISEA PAS researchers being PhD students in other doctoral schools.

### **Remarks (max 500 words)**

ISEA PAS plans to develop and implement a code of good practice to regulate the relationship between scientific supervisors and PhD students. Additionally, exploring avenues to acquire external funding to offer specialized research and analytical training, as well as career planning programs for young employees is planned.

### **Have any of the priorities for the short- and medium term changed? (max 500 words)**

For the current Award Renewal we revised 18 actions proposed in the previous Interim Report. We consider 10 actions (Gap Principles 1, 2, 6, 8, 10-15) as completed. We decided to extend seven actions (Gap Principles 3, 4, 5, 7, 16-18). We consider one action (Gap Principles 9) being still in progress of implementation.

In addition, we have proposed 30 new actions of which eight are completed (Gap Principles 25, 28-30, 32, 33, 36, 40).

ISEA PAS priorities for the short-term change are:

1. Increasing the awareness of the rules of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers among the Institute community and to striving for their full implementation in the framework of ISEA PAS.
2. Extend the principles of OTMR at the Institute, as creating a positive and inclusive work culture is a priority for us.

ISEA PAS's priorities for the medium-term change are:

1. Raising salaries annually, above the statutory minimum.
2. Providing funds for regular training by scientific advisors on managing scientific careers and raising qualifications through participation in various types of specialized courses.
3. Obtaining external financial resources, e.g. from EU and the Ministry of Education and Science, for the purchase of modern equipment for laboratories and room renovations.
4. Consultations and negotiations with the authorities of the Polish Academy of Sciences, local authorities and politicians in order to obtain funds for the construction of a new, modern building to house the Institute.

We are aware that the priorities given as medium-term are a major challenge that is difficult to implement. Still, we want to try. It would be more appropriate to define them as a long-term priority. Steve Jobs said: "You have to be burning with an idea, or a problem, or a wrong that you want to right. If you're not passionate enough from the start, you'll never stick it out." With reference to this quote, we want to take up these challenges, even if they are difficult at the moment.

It is a high priority to keep the working group of the C&C Implementation Team (CCIT) at ISEA PAS in the current composition, as it played a key role in the implementation of HRS4R as a strategic goal of ISEA PAS. The Gap analysis revealed many strengths and weaknesses of the current functioning of the Institute. CCIT members are determined to focus on addressing the most visible and urgent issues identified in the Gap analysis and preparing further action. They also want to monitor new needs on an ongoing basis and review the overall HRS4R situation, and the need to take new actions, to drive ISEA PAS and its ambitions forward, as suggested by one of the UE Experts.

### **Have any of the circumstances in which your organisation operates, changed and as such have had an impact on your HR strategy? (max 500 words)**

The situation related to the Covid-19 pandemic has undoubtedly brought the greatest changes in the working conditions of staff and PhD students in recent years. At that time, we quickly implemented at the Institute online tools for work, meetings and document workflow, which became a regular part of communication.

Moreover, the new act introduced by the Ministry of Education and Science significantly affected the working conditions of scientists and PhD students at ISEA PAS. Pursuant to the new Law on Higher Education and Science, ISEA PAS updates internal regulations related to the annual evaluation of scientists, PhD students and doctoral education.

The years 2022 and 2023 in Poland and Europe were marked by an economic crisis, raising energy costs and high inflation. All this led to the erosion of the real income of employees and PhD students, as well as limited the possibilities of financing small research projects carried out with funds from the own budget of ISEA PAS. For example, it limited the possibility of implementing some research projects due to a significant increase in the prices of reagents,

prevented paleontological and archeological excavations, as well as reduced the amount of field work due to increase of travel and fuel costs.

The war in Ukraine also changed working conditions in ISEA PAS. It had a negative impact on the mental well-being of employees and PhD students. We organized help for Ukrainian refugees. Thanks to funding from the Polish Academy of Sciences, we employ several Ukrainians in scientific positions.

**Are any strategic decisions under way that may influence the action plan? (max 500 words)**

The term of office of the Director of ISEA PAS expires this year. In Autumn 2023, Polish Academy of Sciences will begin the process of selecting candidates for the position of director of the Insitute. Despite such a significant change to come for ISEA PAS, we hope that no strategic decision will be made that could affect the action plan. We believe that the new director, who will start work in 2024, will continue activities aimed at implementing the action plan.

### 3. ACTION PLAN

Action Number	Title of the Action	Timing	Responsible Unit	Indicator(s) / Target	Current Status	REMARKS
1	Work place for a Research Development Specialist <b>26. Funding and salaries</b>	Q2 2016	Research Development Specialist	The Director opened work place for a Research Development Specialist, who search for possibilities to engage employees in external projects, enabling the earning of additional funds by studying the available websites and announcements.	COMPLETED	None.
2	New scopes of responsibility <b>23. Research environment</b>	Q3 2016	Director, Human Resources Specialist	The Director of the ISEA PAS interviewed office administration and network employees, and created new scopes of responsibility to fully use the potential of each employee.	COMPLETED	None.
3	Website modernisation <b>19. Recognition of qualifications (Code)</b>	Q3 2016	IT Network Administrator	The ISEA PAS website modernisation included the creation of a proper place on the website for inserting the Regulations on intellectual property protection, as well as the recruitment regulations, information about new employee competitions and the selection of the best candidate, in order to properly inform all the employees of these matters.	EXTENDED	The institute website gained all functions listed in the former targets. However, due to continuous changes in regulations and the need for improvement, the website is currently being upgraded. It will gain a new image and additional functions (like the connection with the repository) in the next months.
4	Monetary compensation for conducting research projects and the popularisation of research <b>26. Funding and salaries</b>	Q4 2016	Director	The ISEA PAS created new rules in the ISEA PAS Labour Regulations about monetary compensation for conducting research projects and the popularisation of the research executed by the ISEA PAS.	EXTENDED	The goals included in this action have been extended and merged with new goals, described in the <b>Action 22</b> .

5	New rules in the Regulations for the annual evaluation of researchers <b>33. Teaching</b>	Q4 2016	Director, Chief Accountant	The ISEA PAS introduced new rules in the Regulations for the annual evaluation of researchers, which ensure monetary compensation or the implementation, utilisation and transfers of knowledge and skills to young researchers.	EXTENDED	The goals included in this action have been extended and merged with new goals, described in the <b>Action 47</b> .
6	Guardian for young Researchers <b>40. Supervision</b>	Q4 2016	Director, Deputy Director	The Director and the Deputy Director appointed the guardian for young researchers after evaluation the employees' experience and predispositions, chose the best candidate.	COMPLETED	None.
7	New criterion in the Regulations for the annual evaluation of researchers <b>33. Teaching</b>	Q4 2016	Director, Deputy Director	A new criterion (participation of young scientists in education) was added to the Regulations for the annual evaluation of researchers. It ensure an additional reward for researchers at the beginning of their career. The ISEA PAS informed all young researchers about a possible prize for their commitment.	EXTENDED	The goals included in this action have been extended and merged with new goals, described in the <b>Action 47</b> .
8	Equipment management <b>23. Research environment</b>	Continuously from Q1 2017	Director, Head of Administration	The ISEA PAS improved the management of the available equipment. An ISEA PAS has an equipment list, created according to the collected data.	COMPLETED	The Institute periodically (every four years) conducts an inventory of its equipment to create a comprehensive list of all available equipment. Additionally, the Institute's website contains a list of equipment available in the Laboratory of Molecular Techniques ISEA PAS.
9	Establishing academic and professional qualifications <b>19. Recognition of qualifications (Code)</b>	Q1 2017	Director, Deputy Director	The ISEA PAS Director and Deputy Director will establish the procedures for academic and professional qualifications. It will be available on the ISEA PAS website.	IN PROGRESS	The rules of scientific qualification based on the rules for awarding the degree of doctor at ISEA PAS and the Rules of procedure for awarding the degree of doctor habilitated at ISEA PAS, adopted by the Scientific Council of ISEA PAS, will be prepared.

10	Possibility of tele-working for employees <b>24. Working conditions</b>	Q2 2017	IT Network Administrator	The ISEA PAS informed the employees about the possibility of tele-working. To achieve this, a remote link for researchers to connect their computers with the ISEA PAS should be installed. The remote link will allow the users to connect to another computer (for example, in the workplace).	COMPLETED	None.
11	Extension of the scope of granting a special allowance for scientific work <b>26. Funding and salaries</b>	Q2 2017	Director, Chief Accountant, Human Resources Specialist	The Director of the ISEA PAS extended the scope for granting a special allowance for scientific work, in consultation with the Chief Accountant and Human Resources Specialist.	COMPLETED	None.
12	Staff advice <b>30. Access to career advice</b>	Q2 2017	Deputy Director, Human Resources Specialist	Staff advice is provided by the Human Resources Specialist and the Research Development Specialist, as they have the best qualifications to offer advice.	COMPLETED	None.
13	Access to research equipment <b>23. Research environment</b>	Q3 2017	Director, Head of Administration	The ISEA PAS renovates the necessary research equipment and cares about the maintenance of the equipment efficiency.	COMPLETED	All persons conducting research in the Laboratory of Molecular Techniques are requested to book for equipment usage in advance in dedicated online calendars. This is done to ensure equal access to the equipment for all research staff.
14	Regulation for solving problems and conflicts <b>34. Complains/appeals</b>	Q1 2018	Director, Human Resources Specialist	The ISEA PAS prepared Regulation for solving problems and conflicts and appointed a person to deal with all complaints – the staff representative. It's available on the ISEA PAS website.	COMPLETED	None.
15	Purchasing mobile internet devices <b>24. Working conditions</b>	Q2 2018	Director, IT Network Administrator	ISEA PAS researchers reported a demand for mobile internet devices. After reviewing each case, the director decides about the purchase. The decision always depends on the budget of the ISEA PAS.	COMPLETED	Unfortunately, due to limited funding, this action was not done. However, the change in the ICT situation in Poland and the improvement of access to mobile Internet and lowering its costs caused that there is no further need for such support.

16	<p>Seeking out new training opportunities</p> <p><b>30. Access to career advice</b></p>	Q1 2019	Director, Research Development Specialist	<p>The Research Development Specialist is responsible for seeking out new training opportunities for the ISEA PAS researchers. The specialist sends information by e-mail about all kinds of training in which the researchers would be interested. If the researcher would like to participate in one the ISEA PAS finance the training.</p>	EXTENDED	<p>The goals included in this action have been extended and merged with new goals, described in the <b>Action 45</b>.</p>
17	<p>Rewarding new activity</p> <p><b>24. Working conditions</b></p>	Q2 2019	Director, Human Resources Specialist	<p>Awards are granted for research projects, spending time on training young researchers or providing training in foreign institutions, etc.</p>	EXTENDED	<p>The goals included in this action have been extended and merged with new goals, described in the <b>Action 22</b>.</p>
18	<p>External company for office and network duties</p> <p><b>23. Research environment</b></p>	Q1 2020	Director, Human Resources Specialist	<p>After checking the new scopes of responsibility the Director decided to use the services of an external company administering the electronic mailbox. ISEA PAS is still working the best solution.</p>	EXTENDED	<p>The majority of previously listed tasks ordered to external companies had been implemented, including public procurement and hardware service. However, there is still a need for progress e.g. in the modernization of mail-box services. Additionally to new challenges emerged in recent years (like access to modern bioinformatic software and devices), the Institute will seek for new possibilities of outsourcing tasks or obtaining access to external software, allowing for remote use by researchers and PhD students.</p>

<p>19</p>	<p>Developing and introducing a code of good practice in the field of relations with the mentor of young employees of ISEA PAS, trainees and interns, and the doctoral dissertation supervisor. Introduction of regular, individual meetings of young (post-doctoral) researchers with mentors (experienced researchers), in order to discuss and consult planning a scientific career, based on, among others, regulations adopted by the Scientific Council of ISEA PAS.</p> <p><b>7. Good practice in research</b>  <b>28. Career development</b>  <b>36. Relation with supervisors</b>  <b>37. Supervision and managerial duties</b>  <b>38. Continuing Professional Development</b>  <b>40. Supervision</b></p>	<p>Q2 2024</p>	<p>Director of ISEA PAS,  Deputy Director for Science,  Mentor of PhD students,  Mentors of young scientists,  Human Resources and Payroll Specialist,  Supervisors of PhD students,  Representative of PhD students</p>	<p>Survey results, short notes/reports from the meetings</p>	<p><b>IN PROGRESS</b></p> <p>ISEA PAS co-runs the Doctoral Studies and the Doctoral School, together with four other scientific institutes, which proves the competence of the Institute's scientists in the field of education and supervision over new generations of scientists. Their functioning is regulated by the Regulations on Doctoral Studies and the Terms and Conditions of the Doctoral School. Internal regulations of ISEA PAS in this matter are included in the Regulations for the award of a doctoral degree at ISEA PAS. Experienced researchers of the Institute transfer knowledge to scientists at an early stage of their careers, including PhD candidates, in accordance with the highest standards, and help them discover and develop their scientific potential. The duties of supervisors and PhD students at ISEA PAS are regulated by Polish law, as well as by internal arrangements, included in Scope of duties of the ISEA PAS scientific staff. Additionally, a mentor for PhD students is appointed at the Institute and seminars for PhD students and employees are held regularly, with participation of experienced academics. As a corrective action after 2016, another mentor was appointed in each department of the Institute, i.e. an independent researcher who is an advisor of young, post-doctoral scientists. Regular meetings are organized at the ISEA PAS departments, during which research plans and analysis results are presented and discussed, together with the mentors. The results of the internal survey indicate an improvement in this respect compared to 2016, but further work is still needed. As corrective action, the duties of mentors for young employees of ISEA PAS, scientific supervisors of trainees and interns, as well as supervisors and doctoral students at ISEA PAS will be defined by additional internal regulations, based on the results of a survey. A code of good practice for the supervisor, doctoral student and scientific supervisor of young employees, trainees and interns will be prepared, which will describe the rules of cooperation between the supervisor and doctoral student and between the scientific supervisor and young employee / trainee / intern. The Scientific Council of ISEA PAS adopted the Regulations for the award of a doctoral degree at ISEA PAS and the Regulations of the procedure for conferring the degree of habilitated doctor at ISEA PAS, which clearly indicate the conditions that must be met in order to start the procedure for awarding the degree. As a corrective action after 2016, a mentor was appointed in each department of the Institute, i.e. experienced and recognized scientists, being advisors of young, post-doctoral scientists. The results of the internal survey show that the relationship with the scientific supervisor / mentor is of great and growing importance for the employees and PhD students of the Institute.</p>
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20	<p>Introduction of regulations enabling: shortening working time in accordance with applicable regulations, possibility of remote work for carers of young children and people with disabilities and the elderly, not assigning tasks requiring trips outside the place of residence for the above-mentioned carers, organization of Institute seminars in a remote or hybrid form to facilitate the participation of the above-mentioned carers in scientific activity of the Institute. Introducing changes to the ISEA PAS Working Regulations aimed at facilitating and promoting work-life balance, using all currently available tools and legal bases.</p> <p><b>10. Non discrimination</b>  <b>17. Variations in the chronological order of CVs (Code)</b>  <b>24. Working conditions</b>  <b>27. Gender balance</b></p>	Q1 2024	Director of ISEA PAS, Human Resources and Payroll Specialist	Survey results	IN PROGRESS	<p>Polish law provides the right to career breaks, and the internal act regulating these issues in ISEA PAS is the OTMR (Open, Transparent and Merit-based Recruitment) Policy of ISEA PAS and the Gender Equality Plan of ISEA PAS. In ISEA PAS, breaks in a scientific career are not perceived negatively – on the contrary, they testify to the candidate's creativity and gaining new experience. The Working Regulations of ISEA PAS allow flexible working time organization and remote work, including using MS Office 365 software available to all employees and PhD students of the Institute. These rules are the result of corrective actions introduced at the Institute after 2016. The results of the internal survey indicate a clear improvement in this regard, but it is still unsatisfactory, and further action is needed. As corrective action, we plan to introduce internal regulations going further and meeting the needs of people e.g. taking care of small children, people with disabilities and older people, and facilitating and promoting work-life balance.</p>
21	<p>Developing and introducing clear employment rules for an indefinite period at ISEA PAS.</p> <p><b>16. Judging merit (Code)</b>  <b>17. Variations in the chronological order of CVs (Code)</b>  <b>18. Recognition of mobility experience (Code)</b>  <b>19. Recognition of qualifications (Code)</b>  <b>20. Seniority (Code)</b>  <b>25. Stability and permanence of employment</b>  <b>27. Gender balance</b>  <b>28. Career development</b></p>	Q4 2023 – Q1 2024	Director of ISEA PAS, Human Resources and Payroll Specialist	Survey results	NEW	<p>The rules of employment at ISEA PAS, including fixed-term contracts, are regulated by Polish law. However, the results of the survey indicate the need to apply corrective measures in this respect by introducing internal regulations, providing clear rules of employment at ISEA PAS for an indefinite period.</p>

22	<p>Development of rules and implementation of a system for granting periodic task allowances to employees, including monetary compensation for conducting research projects, teaching and popularising science.</p> <p><b>10. Non discrimination</b><b>16. Judging merit (Code)</b><b>17. Variations in the chronological order of CVs (Code)</b><b>18. Recognition of mobility experience (Code)</b><b>19. Recognition of qualifications (Code)</b><b>21. Postdoctoral appointments (Code)</b><b>22. Recognition of the profession</b><b>27. Gender balance</b><b>28. Career development</b><b>38. Continuing Professional Development</b></p>	Q2 2024	Director of ISEA PAS, Chief Accountant, Human Resources and Payroll Specialist	Survey results	IN PROGRESS	<p>The salaries of ISEA PAS employees are regulated by national legislation and the Remuneration Regulations of the employees of ISEA PAS. Due to limited funds, ISEA PAS compensates monetarily only researchers obtaining prestigious European grants and scientific staff promoting research via media like national newspapers and TV. In the academic year 2018/2019, a financial reward was introduced for researchers who taught PhD students. Five lecturers received this reward. Unfortunately, due to financial crisis and limited resources at the Institute, this incentive was discontinued in subsequent years. Survey indicated need for applying further corrective measurements in this respect by implementing monetary compensations for other ways of promoting science and to the researchers obtaining other types of grants. Moreover, it is important to implement a reward system for staff who show exceptional engagement in new activities in upcoming years and develop rules and implementation of a system for granting periodic task-related allowances to employees.</p>
23	<p>Development of rules and implementation of a system for granting periodic task allowances to employees, including monetary compensation for conducting research projects, teaching and popularising science.</p> <p><b>9. Public engagement</b> <b>16. Judging merit (Code)</b> <b>19. Recognition of qualifications (Code)</b> <b>24. Working conditions</b> <b>26. Funding and salaries</b> <b>28. Career development</b></p>	Q2 2024	Director of ISEA PAS, Deputy Director for Science, Deputy Director for Administration, Mentors of young scientists	Survey results	NEW	<p>Polish law and the Statute of the Institute of Systematics and Evolution of Animals of the Polish Academy of Sciences and the Working Regulations of ISEA PAS provide career development prospects for researchers and PhD students. The Scientific Council of ISEA PAS adopted the Regulations for the award of a doctoral degree at ISEA PAS and the Regulations of the procedure for conferring the degree of habilitated doctor at ISEA PAS, which indicates the conditions that must be met in order to start the procedure for awarding the degree. However, the results of the survey indicated further need for improvement in this manner. Creating internal career development guidelines for individuals who have attained their doctoral degree, as well as technical, administrative, and research staff must be done. These guidelines will be developed in accordance with ISEA PAS Work Regulations and the regulations governing the awarding of the habilitated doctor degree at ISEA PAS. The ultimate goal is to establish clear guidelines that align with ISEA PAS Work Regulations, promoting scientific career growth and internal career development.</p>

24	<p>Financing specialist training in the field of improving the research and analytical competences of the Institute's employees.</p> <p><b>28. Career development</b>  <b>38. Continuing Professional Development</b>  <b>39. Access to research training and continuous development</b></p>	Q1 2024 – Q4 2025	<p>Director of ISEA PAS,  Deputy Director for Science,  Chief Accountant,  Research Development Specialist</p>	Survey results	IN PROGRESS	<p>The Institute values the growth and development of researchers and provides support by financing specialist courses and workshops through Erasmus+ programme, external grant or its own resources. However, due to limited financial resources, these opportunities were limited. The survey results indicate the need for additional corrective actions. To ensure equal access to funds from internal sources, principles will be developed. These principles will enable continuous development of research skills and qualifications. Additionally, the Institute will explore external financing opportunities for training and try to possess them.</p>
25	<p>Creation of a tab with a constantly updated training offer for employees and doctoral students, on ISEA PAS internal website.</p> <p><b>28. Career development</b>  <b>38. Continuing Professional Development</b>  <b>39. Access to research training and continuous development</b></p>	Q3 2023	<p>Deputy Director for Science,  Research Development Specialist,  IT Administrator</p>	Cyclic reports on updating the tab	COMPLETED	<p>In 2023, a tab was created on the ISEA PAS internal website with information on available trainings, workshops for employees and doctoral students. Published information will be actualised constantly.</p>
26	<p>Organisation of trainings for current supervisors and employees interested in recruiting PhD students.</p> <p><b>2. Ethical principles</b>  <b>3. Professional responsibility</b>  <b>4. Professional attitude</b>  <b>5. Contractual and legal obligations</b>  <b>6. Accountability</b>  <b>7. Good practice in research</b>  <b>23. Research environment</b>  <b>24. Working conditions</b>  <b>27. Gender balance</b>  <b>28. Career development</b>  <b>33. Teaching</b>  <b>36. Relation with supervisors</b>  <b>38. Continuing Professional Development</b>  <b>40. Supervision</b></p>	Q2 – Q3 2024	<p>Mentor of PhD students,  Mentors of young scientists,  Deputy Director for Science,  Representative of PhD students</p>	Survey results, training attendance lists	EXTENDED	<p>The duties of supervisors and PhD students at ISEA PAS are regulated by Polish law and by the Scope of duties of ISEA PAS scientific staff. Additionally, a code of good practice for the supervisor, PhD student and scientific supervisor of young employees, trainees and interns will be prepared, as mentioned in the action 19. To constantly improve hard and soft skills of supervisors, we plan two trainings. The first one will be aimed at presenting to supervisor and potential supervisors the obligations towards PhD students and formal and legal regulations, in accordance with the "Terms and Conditions of the Doctoral School" and "Regulations for the award of a doctoral degree at ISEA PAS". The second training will be aimed at supporting the development of competences necessary to work with PhD students (assertiveness in cooperation with a PhD student, solving conflicts, communication with people in mental crisis, providing feedback on the progress of a doctoral dissertation), building effective cooperation with a PhD student and motivating both PhD student and supervisor.</p>

27	<p>Publishing the Recruitment Regulations on ISEA PAS public website.</p> <p><b>10. Non discrimination</b>  <b>12. Recruitment</b>  <b>13. Recruitment (Code)</b>  <b>14. Selection (Code)</b>  <b>15. Transparency (Code)</b>  <b>16. Judging merit (Code)</b>  <b>17. Variations in the chronological order of CVs (Code)</b>  <b>18. Recognition of mobility experience (Code)</b>  <b>19. Recognition of qualifications (Code)</b>  <b>27. Gender balance</b>  <b>28. Career development</b></p>	Q4 2023	<p>Director of ISEA PAS,  Deputy Director for Science,  Heads of Scientific Units,  IT Administrator,  Human Resources and Payroll Specialist</p>	<p>Survey results, link to the Regulations</p>	NEW	<p>High standards in recruitment are guaranteed by Polish law, and in the Institute - by the Statute of the Institute of Systematics and Evolution of Animals of the Polish Academy of Sciences. The assessment of candidates' achievements is carried out in accordance with the Regulations of the competition for scientific positions at ISEA PAS. Recruitment results are published on the public website of ISEA PAS, with justification. The results of the internal survey indicate the effectiveness of the corrective actions taken after 2016, confirmed by a very significant improvement in this respect. However, further corrective action is still needed, and we will publish the Regulations of the competition for scientific positions at ISEA PAS on the Institute's webpage, to make it publicly available to all potential candidates.</p>
28	<p>Introduction of the Gender Equality Plan of ISEA PAS and Regulations for solving conflicts between employees at ISEA PAS.</p> <p><b>10. Non discrimination</b>  <b>27. Gender balance</b></p>	Q3 2023	<p>Director of ISEA PAS,  Anti-mobbing Committee,  Gender Equality Officer</p>	<p>Orders of the Director of ISEA PAS</p>	COMPLETED	<p>To ensure gender equality guaranteed by Polish law, Gender Equality Plan and Regulations for solving conflicts between employees at ISEA PAS were introduced at the Institute.</p>
29	<p>Introducing the Code of Ethics for PhD Students.</p> <p><b>2. Ethical principles</b></p>	Q1 2019	<p>Mentor of PhD students,  Representative of PhD students</p>	<p>Link to the Code</p>	COMPLETED	<p>ISEA PAS adheres to all the rules contained in the Code of Ethics for Researchers, adopted by the Polish Academy of Sciences, which is indicated also by the results of the internal surveys from 2016 and 2023. Additionally, the Code of Ethics for PhD Students has been introduced in the Doctoral School of Natural and Agricultural Sciences, co-run by ISEA PAS.</p>
30	<p>Appointment of a mentor for PhD students and increase the number of young (post-doctoral) researchers mentors.</p> <p><b>7. Good practice in research</b>  <b>23. Research environment</b>  <b>24. Working conditions</b>  <b>28. Career development</b>  <b>36. Relation with supervisors</b>  <b>38. Continuing Professional Development</b>  <b>40. Supervision</b></p>	Q3 2023	<p>Director of ISEA PAS,  Deputy Director for Science,  Heads of the Scientific Units</p>	<p>Order of the Director of ISEA PAS, Appointment documents</p>	COMPLETED	<p>Responding to the need to improve the transfer of knowledge and experience between experienced and young scientists of the Institute, indicated in the internal survey, a mentor for PhD students and a group of mentors for young (post-doctoral) researchers have been appointed.</p>

31	Update of the Intellectual Property Protection Regulations of ISEA PAS. <b>31. Intellectual Property Rights</b>	Q1 – Q2 2024	Director of ISEA PAS, Research Development Specialist, Human Resources and Payroll Specialist	Order of the Director of ISEA PAS, link to the Regulations	IN PROGRESS	The update of the Intellectual Property Protection Regulations of ISEA PAS is the result of corrective actions after 2016. The results of the internal survey indicate a significant improvement in this area, and an increase in the importance of this issue for employees and PhD students of ISEA PAS.
32	Appointment of the Gender Equality Officer. <b>1. Research freedom 2. Ethical principles 10. Non discrimination 24. Working conditions 27. Gender balance</b>	Q2 2023	Director of ISEA PAS	Order of the Director of ISEA PAS, Appointment document	COMPLETED	In June 2023 the Gender Equality Officer has been established.
33	Facilitated access to the principles of ethics in science. <b>2. Ethical principles 23. Research environment 24. Working conditions</b>	Q3 2023	Director of ISEA PAS, IT Administrator	Link to the tab	COMPLETED	ISEA PAS adheres to all the rules contained in the Code of Ethics for Researchers, adopted by the Polish Academy of Sciences, and additionally PhD students are bound by the Code of Ethics for PhD Students, introduced in the Doctoral School of Natural and Agricultural Sciences, co-run by ISEA PAS. A tab dedicated to Ethics in Science has been created on the Institute's public website. The results of the internal surveys from 2016 and 2023 indicate a constantly high adherence to ethical standards in research conducted at ISEA PAS.
34	Ensuring the security of scientific data. <b>7. Good practice in research</b>	Q2 - Q3 2024	Director of ISEA PAS, IT Administrator, Research Development Specialist	Realisation of the Information Security Policy in ISEA PAS, Manual for the management of the IT system used for the processing of personal data in ISEA PAS	NEW	ISEA PAS implements good practices in scientific research, including the protection of research and personal data, provided in the Information Security Policy in ISEA PAS and Manual for the management of the IT system used for the processing of personal data in ISEA PAS. As mentioned in the Action 39, an electronic repository will be created at the Institute to archive and back up research data collected by employees and PhD students of ISEA PAS. The next step towards improving the protection and management of research data at the Institute will be to create a procedure for backing up.
35	Creation of an electronic document repository. <b>7. Good practice in research</b>	Q2 - Q3 2024	Director of ISEA PAS, IT Administrator, Research Development Specialist	Cyclic reports on updating storage space usage	IN PROGRESS	The new institutional electronic document repository is planned to be functioning by the end 2024. The main objective for it will be storage of scientific data, but also it will improve the cooperation between the Institute's employees, with external scientists and enable easy access to publications, scientific data and projects.

36	<p>Updating the internal scientific project database, collecting data on projects: title, PI, source of funding, amount of funds awarded, project implementation date, general description.</p> <p><b>7. Good practice in research</b> <b>23. Research environment</b></p>	Q3 2022 and 2023	<p>Director of ISEA PAS, Deputy Director for Science, Heads of the Scientific Units, Research Development Specialist, IT Administrator</p>	<p>Relevant provisions in the Regulations for applying for statutory activities funds</p>	COMPLETED	<p>The scientific project database has been updated. It now includes detailed information about the project's title, project head, financing, timescale, and overall description. In addition, the database has been upgraded to include information about the contractors, type of contract, time of its duration, and justification for the need to hire them. The database also includes the possibility for applying for renewal of work stations, such as purchasing new desks, painting the walls in the room, and other upgrades. Any planned purchases of new equipment or software must be justified in the database, as well as the usage of scientific collection in the research project must be also specified.</p>
37	<p>Encouragement for self-improvement of scientists and professional qualifications.</p> <p><b>29. Value of mobility</b> <b>38. Continuing Professional Development</b></p>	Q1 – Q2 2024	<p>Director of ISEA PAS, Deputy Director for Science, Research Development Specialist, Human Resources and Payroll Specialist</p>	<p>Link to the Regulations</p>	NEW	<p>ISEA PAS encourages self-improvement of research staff. Clear rules for granting and financing training, internships and training leaves related to raising the qualifications of employees and doctoral students needs to be prepared. The regulations will be published on the administrative (internal) website of the Institute</p>
38	<p>Internal support for researchers in the preparation and implementation of externally funded projects – organisation of trainings.</p> <p><b>38. Continuing Professional Development</b> <b>39. Access to research training and continuous development</b></p>	Q4 2024 – Q4 2026	<p>Director of ISEA PAS, Deputy Director for Science, Research Development Specialist, Human Resources and Payroll Specialist</p>	<p>Training attendance lists</p>	NEW	<p>The Specialist responsible for organizing scientific research at ISEA PAS will periodically (after each launch of grant submission) arrange training sessions to prepare for and execute grants acquired from external sources. The training will focus on providing the necessary tools to ensure the smooth execution of the research projects.</p>
39	<p>Administrative support for PhD students from Poland and abroad.</p> <p><b>40. Supervision</b></p>	Q4 2023 – Q1 2024	<p>Administration of ISEA PAS, Human Resources and Payroll Specialist</p>	<p>Survey results, scopes of duties of Administrative staff</p>	NEW	<p>At ISEA PAS, matters of PhD students are regulated by internal regulations: "Regulations on Doctoral Studies, Terms and Conditions of the Doctoral School" and "Regulations for the award of a doctoral degree at ISEA PAS" and regulations of doctoral scholarship funders (National Science Centre, Polish National Agency for Academic Exchange, EC and others). Additionally, the scope of duties for the employee responsible for handling matters related to PhD students, including those from abroad, will be prepared.</p>

40	Changes at the organizational structure of the Institute and creating the position of Deputy Director for Administration. <b>14. Selection (Code)</b> <b>24. Working conditions</b>	Q3 2023	Director of ISEA PAS, Scientific Council of ISEA PAS, Deputy Director for Science, Heads of ISEA PAS Units	Decision of the President of the PAS, Order of the Director of ISEA PAS	COMPLETED	Changes in the Statute of the Institute of Systematics and Evolution of Animals of the Polish Academy of Sciences regarding the internal organisation have been made. New Department of Ecology have been established which was formed from the Landscape Ecology Team. The Head of the new Department is a recognised scientist, ecologist. Moreover, the new position of Deputy Director for Administration has been created at the Institute. His/her role will be among other responsibilities, organization, supervision and improvement of the administrative work related to the research carried out at the Institute.
41	Improving the quality of administrative services at ISEA PAS. <b>11. Evaluation/ appraisal systems</b> <b>24. Working conditions</b>	Q1 2024, Q1 2025, Q1 2026	Director of ISEA PAS, Deputy Director for Science, Deputy Director for Administration	Survey results	NEW	A survey on the opinion of the ISEA PAS employees on the quality of administrative services will be conducted at the beginning of each year. Comparing and analysing the results of the survey will help to plan action improving the quality of administration services at ISEA PAS.
42	Improvement of the OTMR policy in ISEA PAS. <b>1. Research freedom</b> <b>12. Recruitment</b> <b>13. Recruitment (Code)</b> <b>14. Selection (Code)</b> <b>15. Transparency (Code)</b> <b>16. Judging merit (Code)</b> <b>17. Variations in the chronological order of CVs (Code)</b> <b>18. Recognition of mobility experience (Code)</b> <b>20. Seniority (Code)</b>	Q4 2023	Director of ISEA PAS, Human Resources and Payroll Specialist	Link to the new policy file	EXTENDED	The OTMR-policy has been introduced in ISEA PAS in 2019. We would like to develop the OTMR rules at the Institute, as creating a positive and inclusive work culture is a high priority for us. We are working on simplifying job offers and internal regulations in accordance with Polish law.
43	Renovation of the Institute's facilities. <b>23. Research environment</b> <b>24. Working conditions</b> <b>38. Continuing Professional Development</b>	Q4 2023	Director of ISEA PAS, Administrator Manager, Heads of Departments	Service acceptance protocols	IN PROGRESS	In the summer and autumn of 2022 and 2023, major renovations took place in ISEA PAS building, in particular the replacement of windows and heating system. In the last several years some rooms have been refurbished and reorganised in the Department of Invertebrate Zoology, Department of Molecular Biodiversity, Department of Vertebrate Zoology, Laboratory of Molecular Techniques and Natural History Museum. Additionally, two ecological laboratories have been created in the Landscape Ecology Team (now Department of Ecology).

44	<p>Keeping scientists and doctoral students informed about the possibilities of applying for research projects.</p> <p><b>26. Funding and salaries</b>  <b>28. Career development</b>  <b>30. Access to career advice</b>  <b>38. Continuing Professional Development</b>  <b>39. Access to research training and continuous development</b></p>	Q4 2023 – Q4 2026	Research Development Specialist	Survey results, correspondence history	EXTENDED	Information about the possibilities of applying for research is regularly send to researchers and PhD students via email and published on the website. We want to expand this action by publishing more information on the administrative (internal) website and keep searching for additional possibilities of external research funding.
45	<p>Improvement of career development perspectives.  Conducting a survey among employees and PhD students on training needs at ISEA PAS.  Finding another opportunities to use professional counseling for employees and PhD students.  Establishing a network of contacts with domestic and foreign experts in the field of career counselling.  Constant search for new training opportunities. Organizing trainings for researchers and PhD students on planning their own scientific careers, conducted by external experts.</p> <p><b>28. Career development</b>  <b>30. Access to career advice</b>  <b>38. Continuing Professional Development</b>  <b>39. Access to research training and continuous development</b></p>	Q4 2024	Director of ISEA PAS, Deputy Director for Science, Mentors of young scientists, Mentor of PhD students, Human Resource and Payroll Specialist, Research Development Specialist	Survey results, reports (including e.g. number of individual consultations) training attendance lists,	NEW	<p>Polish law and the Statute of the Institute of Systematics and Evolution of Animals of the Polish Academy of Sciences and the Working Regulations of ISEA PAS provide career development prospects for researchers and PhD students. Employees of ISEA PAS have access to funds (both from internal and external sources) enabling continuous development of skills and qualifications, at every stage of their professional career and regardless of the type of contract. In addition, they have a possibility to consult experts from the Horizontal Contact Point and the Excellence in Science Department of the PAS. The Institute regularly sends information on post-doctoral fellowship offers in other national and foreign units to employees and PhD students, and a suitable space has been set up at the internal Institute website to provide information about mobility opportunities, trainings, workshops, courses and internships. The results of the internal survey indicate an improvement in this matter, as well as an increase in the importance of this issue among employees and PhD students of the Institute. However, corrective action is still needed. We are planning to make</p> <p>a survey among the employees and PhD students if the Institute, to recognize their exact training needs. Then, based on the survey results, we will search for other training opportunities, using e.g. the offer of Polish Science Contact Agency "PolSCA" of the Polish Academy of Sciences in Brussels to establish a contact network with national and foreign experts in the field of career advice. Special fund should be created to facilitate the possibility of attendance at professional commercial workshops or specialist courses for young researchers and PhD students of the Institute. The last stage will be constant search for new training opportunities and organising, trainings, workshops, courses etc. for our employees.</p>

46	<p>Conducting a survey on the opinions of researchers on the Regulations on the periodic evaluation of scientific employees of ISEA PAS.</p> <p><b>11. Evaluation/ appraisal systems</b>  <b>16. Judging merit (Code)</b>  <b>23. Research environment</b>  <b>24. Working conditions</b>  <b>28. Career development</b>  <b>38. Continuing Professional Development</b></p>	Q1 – Q2 2024	Director of ISEA PAS, Deputy Director for Science, Research Development Specialist	Survey results	NEW	As indicated in the action number 47, there is a need to update and reorganize the Regulations on the periodic evaluation of scientific employees of ISEA PAS. The first step to achieve this goal will be an internal survey, to find out the opinions, needs and comments of employees.
47	<p>Development and implementation of changes in the Regulations on the periodic evaluation of scientific employees of ISEA PAS, in accordance with legislative changes, in cooperation with employees. Regular updating of the Regulations on the periodic evaluation of scientific employees of ISEA PAS at the beginning of the evaluation period. Including teaching as an additional criterion in the periodic evaluation of researchers.</p> <p><b>3. Professional responsibility</b>  <b>4. Professional attitude</b>  <b>5. Contractual and legal obligations</b>  <b>11. Evaluation/ appraisal systems</b>  <b>19. Recognition of qualifications (Code)</b>  <b>23. Research environment</b>  <b>24. Working conditions</b>  <b>28. Career development</b>  <b>33. Teaching</b>  <b>38. Continuing Professional Development</b>  <b>40. Supervision</b></p>	Q1 2024	Director of ISEA PAS, Deputy Director for Science, Human Resource and Payroll Specialist, Heads of Scientific Units	Survey, Order of the Director of ISEA PAS	EXTENDED	ISEA PAS is a purely research institution, i.e. it is not educating bachelor and master students, and thus didactics is not the basic activity of the Institute. However, the employees of the Institute are obliged to teach at the Doctoral School, which is regulated by the Statute of the Institute of Systematics and Evolution of Animals of the Polish Academy of Sciences and the Scope of duties of ISEA PAS scientific staff. The above-mentioned internal rules were introduced as corrective measures after 2016. The results of the internal survey show a slight improvement in this respect, but further work is still needed. To meet these needs, transferring knowledge and experience to early-stage researchers, i.e. PhD students at the Doctoral School, will be included as an additional criterion in the Regulations on the periodic evaluation of scientific employees of ISEA PAS. There is still a need for compensation for the implementation, utilisation and transfer of knowledge and skills to young researchers, as well as for additional rewards for researchers at the beginning of their careers. This could not be implemented due to insufficient funds available for the institute, but there is a need to fix this issue in the near future.
48	<p>Language accessibility for foreign researchers.</p> <p><b>1. Research freedom</b>  <b>2. Ethical principles</b>  <b>7. Good practice in research</b>  <b>10. Non discrimination</b>  <b>24. Working conditions</b>  <b>27. Gender balance</b></p>	Q3 2023 – Q1 2024	Employee representative	List of the available documents	NEW	We will translate all important internal regulations and documents into English and publish them on the administrative (internal) website. First part of the documents has been available since July 2023.

**The extended version of the reviewed HR Strategy for your organisation for the next 3 years, including the OTM-R policy must be published on your organisation's website. Please provide the link to the dedicated webpage(s) on your organisation's web site\*: URL\*: <http://www.isez.pan.krakow.pl/en/hr-excellence-in-research.html>**

*If your organisation has already filled in the OTM-R checklist in the Initial Phase, please also indicate how your organisation is working towards / has developed an Open, Transparent and Merit-Based Recruitment Policy. Although there may be some overlap with a range of actions listed above in the action plan (as emerged from the Gap Analysis), please provide a short commentary demonstrating the progress of the implementation versus the initial phase.*

**Comments on the implementation of the OTM-R principles (Internal Review for Interim Assessment):**

*The Open, Transparent, Merit-Based Recruitment Regulation has been posted on the ISEA PAS website with the rest of the information about the “HR Excellence in Research” award. This regulation is available to everyone who is interested in working at the ISEA PAS; additionally, the rules are posted as attachments along with every job advertisement on the ISEA PAS and Ministry of Science and Higher Education websites.*

**Comments on the implementation of the OTM-R principles (Internal Review for Award Renewal) :**

Due to the adjustment of the Work Regulations and other regulations to the changing provisions of the Labor Code and the requirements of projects financed from external sources (such as the National Science Centre Poland, Horizon Europe, Structural Funds, etc.), it is necessary to update the OTM-R policy. Therefore, the ISEA PAS OTM-R Policy is being updated and will be published later this month (September 2023). All job advertisements and conducted recruitments are in accordance with the HRS4R strategy as well as the Researcher's Charter and the provisions of the Labor Code. Unfortunately, the biggest challenge in recruiting new scientists is the low salary we can offer within the statutory budget. However, since the last internal review, numerous recruitments have been carried out, including employing foreigners. This was possible thanks to external projects granted to our researchers, although this concerns only selected topics, and low number and short-period positions.

## **4. IMPLEMENTATION**

**General overview of the implementation process: (max. 1000 words):**

The implementation of the Human Resource Strategy for Researchers (HRS4R) at ISEA PAS is an ongoing process, which is constantly being improved and whose individual solutions are being introduced on an ongoing basis. This process started in 2015 when, in October, the Institute of Systematics and Evolution of Animals Polish Academy of Sciences signed a declaration of support for the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers. The second step in preparing ISEA PAS to apply for the title of HR Excellence in Research was the creation of a Working Group, whose task was to conduct a gap analysis and develop an action plan. The weakness of the Working Group was its lack of representativeness, as only four members were appointed: representing researchers (two employees - R4 researchers) and representing the administration (two administrative employees). In 2016 the Working Group conducted an anonymous survey, in which employees and PhD students assessed the level of compliance by the Institute with the requirements set out in the Charter and Code (C&C). The results of these studies were critically analysed. The release of the summary report and action plan was approved by experts and in May 2016 ISEA PAS received the right to use the title and logo of HR Excellence in Research.

In 2019, the working group monitored the entire process of implementing actions under HR Excellence in Research. However, at the time of the outbreak of the Covid-19 pandemic,

the work of the working group and the introduction of implementations related to the implementation of individual tasks was slowed down for two years. The Working Group ended its activity on HRS4R in Spring 2022, due to the change of staff at the position of Research Development Specialist. No new gap analysis nor action plan were developed.

A renewed C&C Implementation Committee (CCIC) working group was established at ISEA PAS to resume the HRS4R strategy in March 2022. This time, the CCIC group consisted of R1-R4 researchers and administration (seven employees in total). In January 2023, the CCIC group conducted a survey among employees and PhD students, without analyses. However, again due to the change of the position of Human Resources and Payroll Specialist and the resignation of the chairman of this group, CCIC stopped working. The group CCIC did not prepare a gap analysis and action plan in line with the requirements of the Renewal Award for the coming years.

On June 30, 2023, the Director of ISEA PAS appointed a new working group called the C&C Implementation Team (CCIT) to prepare a gap analysis in 2023 and an Internal Review for the Renewal Assessment. The team consist of R1-R4 researchers and administration (eight persons in total), including an employee representative. CCIT played a key role in implementing HRS4R as a strategic goal at ISEA PAS. The gap analysis revealed many strengths and weaknesses of the current functioning of ISEA PAS.

Firstly, CCIT focused on addressing the most visible and urgent issues identified in the gap analysis, and preparing for further action. The CCIT completed the work on the Gender Equality Plan, which began last year, and implemented it at the Institute in August 2023. In addition, the position of Gender Equality Officer was created in ISEA PAS in June 2023. The Institute has become more friendly for foreign scientists and PhD students (English translations of the most important internal regulations are now available on the internal webpage). A mentor has also been appointed in each department of the Institute, i.e. an independent researcher who acts as an advisor to young postdoctoral researchers. The position of Deputy Director for Administration has been created at the Institute, whose duties will include: organising, supervising, monitoring and improving of the administrative work related to the research carried out at the Institute. In 2023, a tab was created on the internal ISEA PAS website with information on available training, workshops for staff and PhD students. We believe that this solution will greatly help younger researchers to develop their careers. As more and more staff, PhD students and trainees from abroad work at ISEA PAS, we will translate all important internal regulations and documents into English and publish them on the administration (internal) website. The first part of the documents is available from July 2023.

ISEA PAS adheres to all the rules of the Code of Ethics for Researchers adopted by the Polish Academy of Sciences and, in addition, PhD students are bound by the Code of Ethics for PhD Students introduced in the Doctoral School of Natural and Agricultural Sciences co-run by ISEA PAS. A tab dedicated to Ethics in Science has been created on the public website of the Institute.

CCIT has identified continuing needs at the Institute, and scheduled a meeting with all employees and PhD students to discuss potential solutions.

## **How have you prepared the internal review?**

### **Detailed description and duly justification (max. 500 words):**

For the internal review, in January 2023 an anonymous survey questionnaire was prepared in Polish and English, based on the questionnaire of the survey conducted in 2016, to ensure comparability of results. The questionnaire consisted of 40 questions, related to the 40 principles of The European Charter for Researchers & The Code of Conduct for the Recruitment of Researchers. The survey was carried out between 10/01/2023 - 20/01/2023. The 58 researchers, technicians and PhD students were invited to participate in survey, which was completed by 44 authorized persons (76% participation rate). The results of the survey were analysed by C&C Implementation Team and were basis for prepared of new action plan and continuation action in progress or extended. The main reason repeat survey was to get a complete and fresh overview of the level of satisfaction regarding the

implementation of C&C rules. The CCIT formulated actions with the assigned departments responsible for the implementation. Moreover, indicators were defined in most actions that will enable annual monitoring of progress in their implementation. The next step will be organisation a meeting with all employees and PhD students to discuss the results of survey. Thanks to the relatively small number of ISEA PAS staff, interpersonal contact with employees and PhD students on an everyday basis is possible, that will facilitate the monitoring process.

**How have you involved the research community, your main stakeholders, in the implementation process?**

**Detailed description and duly justification (max. 500 words):**

To be more involved in the onboarding process, researchers were appointed to the Team (and previously to the Committee), taking into account people with different stages of their careers and gender equality. The Team has more members, which allows for a broader point of view and collecting even more feedback about the needs of employees at different stages of their careers (R1-R4 researchers, administration, management, including Deputy Director and Scientific Council members). The members of the C&C Implementation Team present different perspectives resulting in new ideas which contribute to the quality change in the Institute.

Due to the period of the Covid-19 pandemic, we had fewer opportunities for action, but in 2022, meetings of the Director with Heads of Departments (Colleges) were resumed, where current problems and matters to be solved are reported, to which the management can respond and react appropriately.

Later this year, a meeting with researchers and PhD students is planned to discuss the HRS4R award and to present the activities of the C&C Implementation Team. The benefits that scientists have from having the HRS4R award by the Institute will be presented and the need for further involvement of the entire Institute in the implementation of corrective actions will be communicated. The results of the survey in January 2023 show that employees and PhD students know C&C and are aware of its importance for the comfort of their scientific work.

A meeting dedicated to administrative employees on the implementation of HRS4R is also planned. Due to changes in positions, it is necessary to present to new people (and remind others) the HRS4R strategy, present and explain what the award is and how important it is for the entire community of the Institute.

**Do you have an implementation committee and/or steering group regularly overseeing progress?**

**Detailed description and duly justification (max. 500 words)**

In 2016 the Director of the Institute appointed the Working Group (WG) to study the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers (C&C).

Members the WG:

- Dr hab. Sebastian Tarcz – Director
- Prof. dr hab. Zbigniew M. Bocheński – Deputy Director
- Grażyna Dudek – Human Resources Specialist
- Danuta Grabowska – Research Development Specialist

In 2019 the composition of the Working Group was the same.

In March 2022 the Director of Institute appointed the C&C Implementation Committee at ISEA PAS, which included:

- Representatives of research workers: dr hab. Łukasz Kajtoch, dr hab. Dawid Moroń, dr hab. Piotr Wojtal
- Representative of PhD students: mgr Marcin Wiorek
- Representative young workers: dr Daniel Stec

- Representative of administrative employees: research development specialist: mgr inż. Danuta Grabowska
- Human resources specialist: Grażyna Dudek

In June 2023 the Director of Institute changed and appointed the C&C Implementation Team (CCIT) composed of:

- dr hab. Beata Grzywacz – Deputy Director – Team Coordinator
- dr Natalia Sawka-Gądek – Team Member
- mgr Joanna Religa-Sobczyk – Employee Representative – Team Member
- dr hab. Łukasz Kajtoch – Team Member
- dr hab. Piotr Wojtal – Team Member
- mgr Marcin Wiorek – PhD Student - Team Member
- mgr Daria Jamrozek – Research Development Specialist/Human Resources Specialist – Team Member
- mgr Karolina Sychta – Research Development Specialist – Team Member

**Is there any alignment of organisational policies with the HRS4R? For example, is the HRS4R recognized in the organisation's research strategy, overarching HR policy**

**Detailed description and duly justification (max. 500 words)**

The regulations in force at ISEA PAS take into account the principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, as evidenced by an internal analysis from 2023. We know the Charter and the Code and we apply these principles in our daily work at ISEA PAS. The HRS4R assumptions are included in the work regulations, in the Gender Equality Plan, in the updated OTM-R policy and will be included in the created remote work regulations.

**How has your organisation ensured that the proposed actions would be also implemented?**

**Detailed description and duly justification (max. 500 words)**

All documents and regulations in force at ISEA PAS are approved by the Director of ISEA PAS. In addition, they are sent to all employees and doctoral students who are required to read them. The survey conducted in January 2023 shows that although employees and PhD students know the C&C rules to a moderate extent (which we will work on through corrective actions), they agree with them. They know that they concern important issues such as: the functioning of the scientific community, professional ethics, a properly organized work environment, transparent rules for the recruitment of researchers and doctoral students. The C&C Implementation Team includes the heads of laboratories and administrative departments, and it is coordinated by the deputy for science. They have constant contact with the director, e.g. through meetings at colleges or during everyday, ongoing work. In addition, a significant part of the Team members participate in the meetings of the Scientific Council, thanks to which they can actually influence and react on the implementation of HSR4R.

**How are you monitoring progress (timeline)?**

**Detailed description and duly justification (max. 500 words)**

Until now, the research development specialist supervised the process of implementing the action plan from the previous phase by organizing Committee meetings. Currently, the Team's coordinator is the Deputy Director for Research, who, in cooperation with the Research Development Department and all Team Members, coordinates the work related to the implementation of corrective actions. The need to update and access documents for employees is also monitored, including translation of documents for foreign-language employees and PhD students.

**How will you measure progress (indicators) in view of the next assessment?**

**Detailed description and duly justification (max. 500 words)**

So far, we have relied on dialogue and paper surveys. To monitor the implementation process and reliably prepare for the next evaluation, we plan to introduce online surveys, thanks to which we will be able to conduct more of them - with little effort and effort (easy accessibility for everyone, votes counted automatically). In addition, meetings with all employees on the implementation of HRS4R will be organized at least once a year, where it will be possible to submit your suggestions, comments, etc.

**How do you expect to prepare for the external review?**

**Detailed description and duly justification (max. 500 words)**

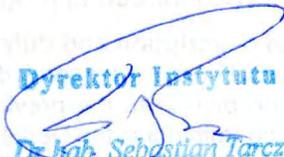
As part of our preparations for the upcoming external review, we will undertake ongoing work and complete the requisite documentation to confirm that corrective actions have been taken. In addition, a meeting will be organized with employees and PhD students to discuss the measures implemented as part of the HRS4R initiative and the necessary steps to maintain the award. To provide external assessors with a clear understanding of the current landscape for higher education and labor laws in Poland, ISEA PAS will compile a list and brief descriptions of relevant regulations and acts at our institute. The implementation of HRS4R will also be presented, outlining completed, ongoing, and planned activities.

**Additional remarks/comments about the proposed implementation process: (max. 1000 words):**

The implementation of the Human Resources Strategy for Researchers (HRS4R) at ISEA PAS is an ongoing process, which is consistently improving. The CCIT Team, appointed in June 2023, has demonstrated efficiency in preparing for the external review by proposing various solutions and implementing some of them. The team is planning to continue implementing additional corrective measures in a timely manner. To ensure a comprehensive understanding of essential aspects of the Institute's functioning and oversee the implementation of regulations affecting scientific work, the current team has enlisted staff members from diverse positions and career stages. The team's efforts have shown promise in enhancing the HRS4R strategy in both the short and long term, with a positive impact on the well-being and working conditions of scientists at all career stages. Through the collaborative efforts of CCIT achieving proposed goals and continuity in promoting successful and supportive research environment will be kept.

**5. ACCEPTANCE**

The Institute of Systematics and Evolution of Animals Polish Academy of Science represented by Director Dr hab. Sebastian Tarcz unreservedly accepts the Human Recourses Strategy for Researchers.

  
Dyrektor Instytutu  
Dr hab. Sebastian Tarcz