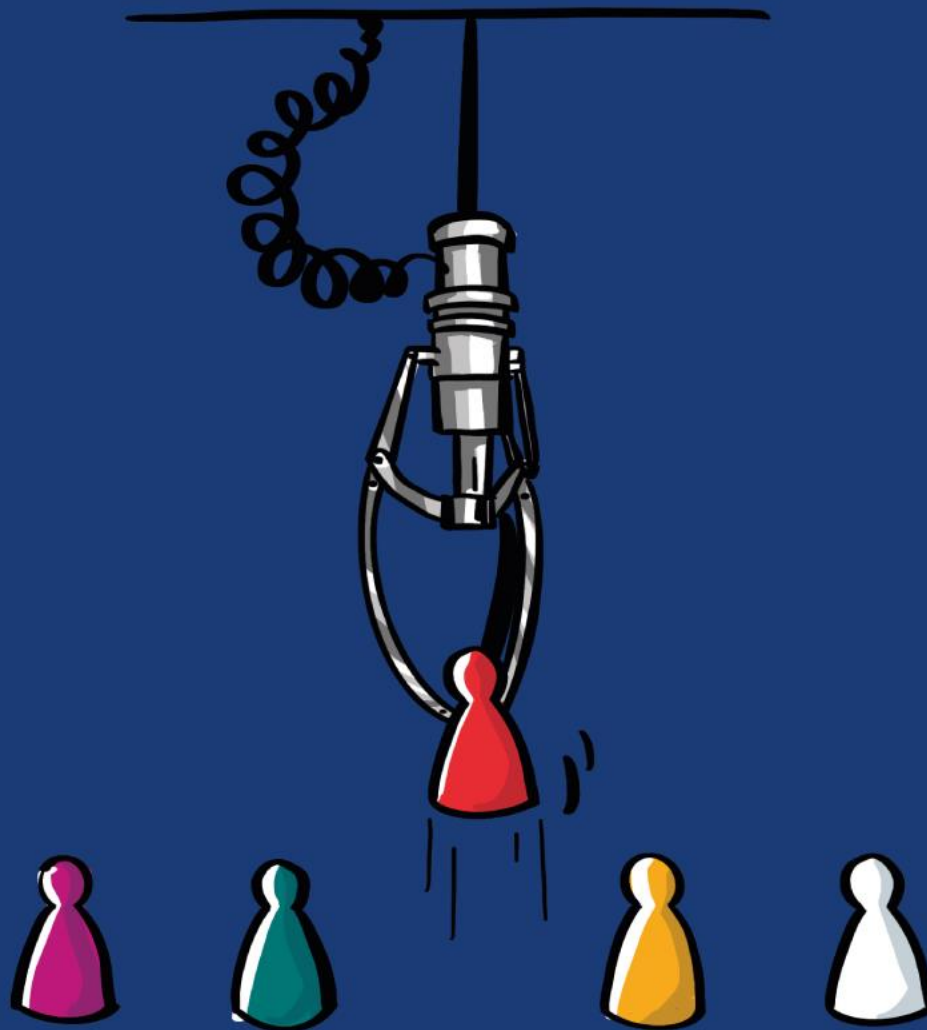


Guide to Recruitment and Selection Procedures



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INTRODUCTION

The critical review of recruitment and selection processes and procedures at all stages, as well as the correction of any biases, are crucial steps in guaranteeing gender equality in academic and research careers. One of the biggest challenges in recruitment is overcoming unconscious bias and structuring processes in a way that guarantees equality, especially for under-represented groups. This guide brings together a series of recommendations to make recruitment processes in scientific research organisations fairer, more objective and more transparent. The objective is to assist and provide guidance to ensure that procedures for recruiting and selecting people for scientific research activities are carried out in a way that promotes equal opportunities and diversity in research teams. This guide is intended for all those involved in the selection and recruitment processes of research or support staff in Research Units, namely members of selection boards, those responsible for preparing calls for proposals, and those responsible for strategic decisions, and/or administrative support.



GUIDELINES FOR PROMOTING INCLUSIVE SELECTION AND RECRUITMENT PROCESSES

This guide presents guidelines for promoting selection and recruitment processes for teams at the University of Coimbra's R&D Units, which can also be adapted to the reality of other institutions in Portugal. The guide is divided into 5 parts that cover the main stages of a recruitment and selection process within the scope of public administration contracting:

- I. The Process and the Public Notice:** this section describes the general and relevant recommendations in the recruitment process, namely the drafting of the notice and the training of the people involved.
- II. Setting up the jury:** this section lists some relevant guidelines for setting up the jury and the related processes.
- III. Evaluation parameters:** this section outlines the precautions to be taken when defining evaluation parameters.
- IV. Evaluation of applications:** this section provides guidance on how applications should be assessed at all stages of the recruitment and selection process.
- V. The interview:** this section provides recommendations for an inclusive interview process.

I. The Process and the Public Notice

- Ensure that the people involved in drawing up the notice and monitoring the process, including staff from the technical department, project coordination and R&D units, are trained in equality, equity and diversity issues, namely the existence of implicit gender bias.
- The person carrying out or supporting the administrative process of the competition procedure should be trained in equality and diversity, as provided by the Human Resources Management Services (SGRH).
- The notice must clearly define the profile of competencies essential to the position for which recruitment is being organised.
- The public notice must establish clear and objective rules to guide the competition process and the application of the selection methods.

- Ensure the transparency of the entire competition process by publicising all the information, stages and decisions relating to the process on the mandatory channels and by notifying applicants.
- Mention in the text of the notice that women/men and minority groups in a given area/category/function are encouraged to apply.
- Use inclusive language and communication throughout the process and documentation generated.
- Collect and store sex-disaggregated data for all stages of the process (applications, selection, recruitment).
- Mention in the text of the notice that the University of Coimbra promotes measures to facilitate the balance between professional, family and personal life.

II. Setting up the jury

- Juries must be made up of a panel of impartial experts, respecting the gender parity rule of 40 per cent women and men (33 per cent in the case of three-member panels), in accordance with the Strategic Plan and Plan for Equality, Equity and Diversity at the University of Coimbra (PIED-UC).
- Include, whenever possible, a person trained in equality and diversity as a moderator.

III. Evaluation parameters

- The evaluation parameters should be explicit and based on the competencies required for the job.
- Interpersonal skills must be integrated into the evaluation parameters in a balanced way.
- Ensure that the evaluation criteria do not penalise breaks in professional activity due to maternity/paternity, care of family members, long-term illness, as has already been determined by the legislator in the context of procurements under the [Decree-Law No. 57/2016](#), of 29 August (Article 5, paragraph 3).
- Reinforcing the circulation of the public notice in unofficial channels, such as less masculinised personal networks to which women and precarious categories have access

(such as the personal networks of the scientific community and informal channels), in addition to publicising it through mandatory channels.

IV. Evaluation of applications

- Objective reasoning based on the established criteria.
- Equitable valorisation of the assessment of all members of the jury.
- In the event of a tie in the ranking, the decision should take into account the promotion of diversity in the team that the person will join.

V. Interviews

- Interviews must be scheduled within normal working hours and be flexible in view of legitimate personal needs (including those of a carer).
- Interviews must follow the selection criteria and competencies published in the notice.
- The quantity and quality of questions should be the same for all applicants.
- Do not ask questions about applicants' personal lives.
- Avoid personal comments/opinions.
- Ensuring that all applicants receive the same information about the interview and fair clarification of any doubts they may have about the process or questions during the interview.
- Sensitising jury members to biases resulting from first impressions, thus preventing evaluations from being influenced by them.

ACKNOWLEDGMENTS

The main reference for this guide was the **Visual Report on Gender Bias in Recruitment** (Relatório Visual de Enviesamentos de Género no Recrutamento), produced in July 2021 by Mónica Lopes as part of the SUPERA project (*Supporting the Promotion of Equality in Research and Academia*). This guide has adapted some of the proposals set out in that report to its aim of encouraging the organisation to conduct more inclusive and diverse recruitment and selection processes at the University of Coimbra.

This guide was produced in collaboration with the team at the Human Resources Management Service (SGRH) of the University of Coimbra, namely Maria Helena Matos, Director of the SGRH, Lília Marques, Head of the Recruitment and Contract Management Division of the SGRH, and Joana Lopes, Senior Technician at the SGRH. Their suggestions and careful evaluation of the proposals in the Visual Report made it possible to adapt it to the reality of the University of Coimbra, ensuring its usefulness for those in charge of the University's recruitment and selection processes.



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ANNEX 1 – Checklist of Good Practices in Recruitment and Selection Processes

In order to help plan more inclusive and diverse recruitment and selection processes, a Checklist has been drawn up, which follows below. The *Checklist* can also be accessed on the Gender@UC EEA Grants project website at <https://www.uc.pt/en/iii/gender/resources/>. This *Checklist* can be printed out and used to prepare recruitment and selection processes for research teams at the University of Coimbra.



***Checklist* of Good Practices in the Recruitment and Selection Processes**

Recruitment and selection system

- The people involved in drawing up the notice and monitoring the process, including staff from the technical department, project coordination and R&D units, are trained in equality, equity and diversity issues, namely the existence of implicit gender bias.
- The person carrying out or supporting the administrative process of the competition procedure is trained in equality and diversity, as provided by the Human Resources Management Services (SGRH).
- The rules for managing the competition process are clear and objective.
- The transparency of the competition process is ensured through the dissemination of all information, stages and decisions relating to the process in the mandatory dissemination channels and through notification to applicants.
- Inclusive language and communication is used throughout the process and documentation generated.
- Sex-disaggregated information is collected and stored at all stages of the process (from application to hiring).

Public Notice and Application

- The text of the public notice makes it clear that women/men and under-represented minority groups in certain areas/categories/functions are encouraged to apply.
- The text of the notice states that the University of Coimbra promotes measures to facilitate the balance between professional, family and personal life.
- Interpersonal skills are integrated into the assessment parameters in a balanced way.
- The notice clearly defines the profile of competencies essential to the position for which recruitment is being organised.
- The vacancy is advertised widely and diversely to attract a large number of applications, using different communication channels in addition to the mandatory ones.

Selection and Assessment

- The jury is made up of a panel of impartial experts, respecting the gender parity rule of 40% women and men (33% in the case of three-member panels).
- The evaluation criteria do not penalize breaks in professional activity due to maternity/paternity, family care or long-term illness.
- CVs are carefully assessed, taking into account the previously defined profile.
- Interviews are structured and focused on the competencies required for the position, based on a script with questions that help identify the suitability of the application to the profile.
- Interviews are scheduled within normal working hours and are flexible in view of legitimate personal needs (including those of a caregiver).
- All applicants receive the same information about the interview and fair clarification of doubts or questions about the process.
- Jury members are made aware of biases resulting from first impressions, preventing them from interfering in the evaluations of candidates.
- Performance in selection tests and dynamics is assessed fairly and impartially, taking into account the context of the profile, position and competencies required.
- Applications are assessed objectively on the basis of the established criteria, with all members of the jury giving equal weight to their assessment.
- In the event of a tie in the ranking, the decision will take into account the promotion of diversity in the team that the person will join.
- The references provided by applicants are checked and they may be contacted for more information about the applicant.
- The final decision is based on the profile of the applicant and on an assessment of their knowledge, competencies and experience.

Hiring

- The final decision of the selection process is duly substantiated so that those who were not selected can understand the outcome of the procedure and the points they may need to improve for future opportunities.

- After hiring, the performance of the new team member is monitored to ensure proper integration.

