**Principles of organisation and documentation for the organisers of** **activities for the development and improvement of employee competencies at the University of Warsaw, undertaken in the"Excellence Initiative - Research University" (IDUB) Programme, implemented at the University of Warsaw**

1. General provisions

1. The following principles concern the organisation of development activities in the Programme and the applicable remuneration rates for employees who conduct development activities.
2. Wherever reference is made to:
   1. regulations - this should be understood as the Regulations for the qualification and participation in development activities which are aimed at improving the competencies of employees at the University of Warsaw, which are undertaken as part of the "Excellence Initiative - Research University" (IDUB) Programme;
   2. employee - this should be understood as a person employed during the implementation of a development activity at the University, on the basis of an employment contract or other act of appointment, in a group of academic teachers or employees who are not academic teachers;
   3. participant - this should be understood as an employee of the University who is taking part in a development activity, which is being carried out on the basis of the regulations;
   4. superiors - this should be understood as the head of the organisational unit at the University, referred to in § 11 section 1, items 1-5 of the Statute of the University of Warsaw, in which the employee performs duties within the meaning of § 114 of the Statute of the University of Warsaw, and in the case of
      1. Vice-Rectors, heads of organisational units referred to in § 11 section 1 items 1-5 of the Statute of the University of Warsaw, the representatives of the Rector (excluding the Bursar's representatives), the Chancellor, the Bursar, employees of the university-wide administrative organisational units referred to in § 30 section 1 of the Organisational Regulations of the University of Warsaw, and employees working in independent positions who report directly to the Rector's staff - the University Rector;
      2. deputies to the Chancellor, the directors of a separate category of activities in university-wide administration and heads and employees of organisational units of university-wide administration, subject to section 2(d), point i - the University Chancellor;
   5. organisers - this should to be understood as the University unit that is organising development activities in the Programme, on the basis of the regulations;
   6. external subcontractors - this should be understood as an entity, other than an employee of the University, performing tasks related to the implementation or the service of development activities;
   7. development activity - this should be understood as a development activity which is carried out in a synchronous (online, on location, or outgoing), asynchronous, or mixed mode, in the form of:
      1. individual coaching, in order to support an employee during the introduction of an intended change to the way they work, based on their own conclusions and resources. Coaching may be conducted in the form of a single meeting or a series of meetings constituting a whole for an individual participant, by a qualified coach,
      2. group coaching, similar in form to training and meeting its requirements, devoted to expanding upon the subject of interpersonal relations, with particular emphasis on team relations, conducted by a qualified coach;
      3. career advisory related to the development of an employee's professional career. Career advisory may be conducted in the form of a single meeting or a series of meetings constituting a whole for an individual participant, by a qualified career advisor;
      4. a course consisting of more than 16 teaching hours,
      5. mentoring, consisting in supporting an employee in the development of competencies by a more experienced senior employee, or one with significant professional achievements. Mentoring can be carried out in the form of a single meeting or a series of meetings that constitute a whole for an individual participant,
      6. training, for up to 16 teaching hours. Training may be carried out in the form of a complete cycle, in terms of its content or group of participants.

Coaching, career advisory, or mentoring cannot be carried out by the direct or indirect supervisor of the participant, or by his / her academic supervisor;

* 1. balance of competences - this should be understood as the measurement of the assumed results of the implemented development activities, which may be conducted in the form of research on the following: participants' satisfaction, the increase in knowledge and skills resulting from participation in the development activity, applications for acquired competences during the implementation of professional tasks, changes and improvements in work organisation introduced as a result of participation in a development activity (D. Kirkpatrick's model);
  2. agreement - this should be understood as an agreement regarding the improvement of professional qualifications, concluded with an employee on the terms set out in Ordinance No. 85 of the Rector of the University of Warsaw of 18 May 2021, on the principles of improving the professional qualifications of employees of the University of Warsaw (UW Monitor, item 85.

2. Principles of organisation for development activities

1. The use of the rates indicated in these principles does not release the organisers from verifying the validity and rationality of the rates / costs applied, including those which are below the maximum level. The adoption of the maximum rate does not mean that it will be accepted in every development activity; when assessing the budget for each of the development activities, factors will be taken into account which include but are not limited to the degree of complexity of the support provided under the measure, the size of the target group, and applicable justification of a given budget item.
2. It is obligatory to compare the costs of ordered services with the corresponding cost of the service / product available on the commercial market. For this purpose, market research must be carried out and documented.
3. Standards for the implementation of group and individual development activities
4. Information on the development activities being offered, along with full information on the principles of recruitment and implementation of development activities, is published in the News on the Programme website <https://inicjatywadoskonalosci.uw.edu.pl/> and on the platform [http://szkolenia-rozwoj.uw.edu.pl](http://szkolenia-rozwoj.uw.edu.pl/).
5. Registration for a development activity takes place electronically, via the platform <http://szkolenia-rozwoj.uw.edu.pl> unless the organiser decides otherwise, due to the specificity of the group, the nature of the development activity, or a decision made by those implementing the activity.
6. When an employee has been pre-qualified to participate in a development activity, the value of which exceeds 5,000 PLN per person, the organiser is obliged to inform the employee's supervisor about the need to conclude a contract with the employee on improving professional qualifications, referred to in § 6 section 1 point 1 of Ordinance No. 85 of the Rector of the University of Warsaw of 18 May 2021, on the principles of improving the professional qualifications of employees of the University of Warsaw, no later than 21 days before the date of the financial commitment by the University. The signing of a contract by the employee is a condition for participation in the development activity.
7. The development activity should be accompanied by a balance of competences carried out by the organiser, which allows for an assessment of the effectiveness of the activities.
8. The organiser is obliged to document the implemented development activities, including in particular the creation and collection of:
   1. programs of completed development activities;
   2. attendance lists signed by participants on each day of the development activity, carried out in synchronous (on location or outgoing) mode, or attendance logs signed by the instructor in the case of activities carried out in an online or mixed form - indicating the duration of the activity and the instructor - which applies to classes conducted in a synchronous mode;
   3. balance of competencies;
   4. applications for supplementary remuneration for development activities;
   5. contracts with external subcontractors and reports confirming the performance of services / delivery of goods;
   6. contracts for entrusting personal data processing, in accordance with the current model available on the website of the Data Protection Officer of the University of Warsaw;
   7. diplomas and other documents confirming the completion of the development activity.
9. The organiser is obliged to post information about the implementation of the development activity under the "Excellence Initiative - Research University" (IDUB) Programme at the University of Warsaw, in accordance with Chapter 4. Rules for publishing information about IDUB financing for these principles.
10. The organiser is obliged to store documents concerning the implemented development activities for at least 5 years from the date of completion of the Programme at the University of Warsaw.
11. The valid templates for documents and promotional materials have been made available to organisers on the Programme website: www.inicjatywadoskonalosci.uw.edu.pl in the Intranet tab, after logging in using a CAS account.
12. Rules for publishing information about IDUB financing

1. The organiser is obliged to post information about the implementation of the development activity as part of the "Excellence Initiative - Research University" (IDUB) Programme at the University of Warsaw.

2. The inclusion of the following information about the Programme is obigatory:

2.1. on the website or other location where the description of the development activity is posted (including the program, regulations for qualification),

2.2. on the platform [http://szkolenia-rozwoj.uw.edu.pl](http://szkolenia-rozwoj.uw.edu.pl/) or on other websites used to register for a development activity, if possible,

2.3. at least on the first and last slides of a multimedia presentation used during the development activity,

2.4. in printed materials made available to participants of the development activity.

3. The requirement specified in section 2.3 is applicable when using the presentation template provided by the Coordinating Office of the IDUB Programme.

4. If the development activity does not incorporate a multimedia presentation, the instructor is obliged to provide information about the Programme verbally at the beginning of the development activity.

5. It is additionally recommended that information about the Programme be presented in the form of roll-ups or posters placed in visible places, in the room (space) and in front of the room (space) where the development activity is carried out. Roll-ups may be obtained from the IDUB Programme Coordinating Office.

6. The information referred to in point 2:

6.1. contain at least the UW logotype and the IDUB logotype, in accordance with the layout used on the IDUB letterhead, and the website address of the IDUB Programme, or

6.2. contain the following text: Development activity implemented under Action [number] [title] of the "Excellence Initiative - Research University" Programme at the University of Warsaw (instead of the initial phrase "Development activity", the name of the type of development activity may be used, e.g., "Training").

7. The information referred to in point 3 contain the following description: Development activity implemented under Action [number] [title] of the "Excellence Initiative - Research University" Programme at the University of Warsaw (or instead of the initial phrase "Development activity", the name of the type of development activity may be used, e.g., "Training").

8. The roll-ups and posters referred to in point 5 contain at least the UW logo and the IDUB logo, in accordance with the layout adopted on the IDUB letterhead.

9. The graphic layout of the roll-ups and posters is accepted by the IDUB Programme Coordinating Office.

1. The implementation of development activities by instructors who are employees of the University of Warsaw - Appendix 2 to Ordinance No. 72 of the Rector of the University of Warsaw of 21 April 2021 on remuneration in the IDUB Programme at the University of Warsaw
2. **Renumeration rates for development activities carried out synchronously by employees of the University of Warsaw.**

1.1. Conducting development activities may be commissioned to employees acting as lecturers, trainers, coaches, mentors, career advisors or organisational units of the University that are employing these individuals, using the basic rates of supplementary remuneration for development activities, carried out synchronously (Table 1, col. b).

1.2. Basic rates for development activities carried out in a synchronous mode may be increased (Table 1, col. c), in the event of development activities requiring the instructor to have both scientific achievements and practical experience in a selected field, activities targeted at the highest administrative staff (e.g., the Rector's staff, the Chancellor's staff, Dean's colleges), or a high degree of specialisation in the subject which limits the number of potential instructors.

Table 1.

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| --- | --- | --- |
| **col. a** | **col. b** | **col. c** |
| **Development activity** | **Base rate of supplementary remuneration in PLN (gross) for 1 teaching hour (45 min.)** | **Increased supplementary remuneration rate in PLN (gross) for 1 teaching hour (45 min.)** |
| Language training or course | 140.00 | 180.00 |
| Non-linguistic and specialised training or course; mentoring, career advisory | 180.00 | 280.00 (MA)  320.00 (dr)  350.00 (dr hab. and professor) |
| Group or individual coaching, specialised training or course | 250.00 |

1. **Renumeration rates for development activities carried out in an asynchronous or mixed mode by UW employees.**

2.1. Conducting development activities may be commissioned to employees acting as lecturers, trainers, coaches, mentors, career advisors or organisational units of the University that are employing these individuals, using the basic rates of supplementary remuneration for development activities, carried out in mixed mode (Table 2, col. b).

2.2. Basic rates for development activities carried out in a mixed mode may be increased (Table 2, col. c), in the event of development activities requiring the instructor to have both scientific achievements and practical experience in a selected field, activities targeted at the highest administrative staff (e.g., the Rector's staff, the Chancellor's staff, Dean's colleges), or a high degree of specialisation in the subject which limits the number of potential instructors.

Table 2.

|  |  |  |
| --- | --- | --- |
| **col. a** | **col. b** | **col. c** |
| **Development activities** | **Supplementary remuneration rate in PLN (gross) for 1 teaching hour (45 min.)** | **Increased supplementary remuneration rate in PLN (gross) for 1 teaching hour (45 min.)** |
| Language training or course in a mixed mode | 140.00 | 180.00 |
| Non-language training or course in a mixed mode | 180.00 | 280.00 (MA)  320.00 (dr)  350.00 (dr hab. and professor) |
| Training or course conducted entirely in an asynchronous mode | according to remuneration rates agreed upon individually with the organiser, depending on the amount of work involved in the preparation of a development activity and the number of planned participants | |

1. External subcontractors of development activities

Ordering development activities for legal entities or natural persons who are not employees of the University of Warsaw takes place on the basis of the appropriate procedure in the PPL.

1. Standards of costs for services accompanying development activities
2. According to rates set individually, depending on the workload associated with carrying out activities and the number of planned participants / recipients:
   1. Costs of conducting an analysis of training needs, an analysis of the level of competence before and after the development activity;
   2. Costs of developing training programs and courses (for new development initiatives, in a new scope or formula, not yet implemented by the applicant, or carried out repeatedly for subsequent groups of recipients by various instructors).
3. According to rates determined as a result of an inquiry addressed to min. 3 potential bidders:
   1. Costs of purchasing "ready-made" teaching materials (licenses, games, tests, etc.);
   2. Costs of the preparation and printing of materials;
   3. Costs of commercial rental for training rooms outside the University;
   4. Catering costs for development activities carried out in an outgoing mode;
   5. Accommodation costs during outgoing training;
   6. Costs of promotion
   7. Others (translation costs, services and promotion costs).
4. General guidelines on incurring costs under the IDUB Programme.

Costs may be considered eligible if all of the following conditions are met:

* it was actually incurred during the period when the Action was taking place;
* it complies with applicable laws;
* it aims to achieve the Programme Objective by improving one or more IDUB Indicators;
* it is necessary for the implementation of the Action and was incurred in connection with the implementation of the Action;
* it is necessary and was incurred in relation to the implementation of the Action;
* it was made in a transparent, rational, and effective manner, in accordance with principles for obtaining the best results from the given input;
* it has been duly documented;
* it was incurred in accordance with the provisions of Public Procurement Law;
* it was incurred in accordance with Art. 44 section 3 of the Public Finance Act;
* it does not constitute an ineligible cost under internal and national regulations.

Eligible costs are those consistent with applicable accounting principles, the principles of sound financial management, and applied practices (accounting policy).

1. Participants in development activities
2. The minimum number of participants in group development activities (trainings, courses, group coaching):
   1. 8 participants for 1 instructor.
3. The following persons are entitled to participate in individual development activities, such as individual training and language courses, as well as individual coaching:
   1. the Rector, the Vice-Rectors;
   2. Deans and Vice-Deans;
   3. the Chancellor and Deputy Chancellors, including the Bursar, Bursar's Deputy;
   4. other heads of organisational units and their deputies;
   5. the directors of a separate category of activities in university-wide administration and administrative directors in organisational units and their deputies;
   6. other employees, with the consent of the Rector.
4. Only the following employees may participate in activities:
   1. those employed at the University of Warsaw during the development activity;
   2. those whose tasks resulting from their job position, function, or role performed at the University of Warsaw (now or in the future) require the use of competencies developed during development activities.
5. In the event of failure to meet the condition included in section 3, the cost of the development activity and associated costs constitute the participant's income and require taxation, with personal income tax pursuant to the Act of 26 July 1991, on personal income tax.
6. In the case of development activities that meet the conditions set out in Appendix 2 to Ordinance No. 85 of the Rector of the University of Warsaw of 18 May 2021, on the rules for improving the professional qualifications of employees of the University of Warsaw, the employee is obliged to conclude an agreement with the employer, obliging that individual to remain employed after the end of the development activity.