

Develop Screening Criteria Matrix

(From Search Advocate Handbook 2017)

Regardless of whether they have had the opportunity to contribute to the position description and qualifications, before opening the search the committee should now discuss the qualifications in detail, to identify the criteria by which each will be measured. Everyone needs to reach shared understanding about the meaning of each criterion, how it relates to the position, and the different ways an applicant might meet it. This understanding will enable committee members to converse knowledgeably with prospective applicants when they engage in personal recruiting during the search/application phase. It will also provide a strong foundation for the screening stage.

Bias Risks

- Poorly defined screening criteria—“we all know what this means” or “I’ll know it when I see it;”
- Specific position expectations not addressed—committee doesn’t fully understand what the unit needs from this position in each area of responsibility given current circumstances. Example: committee establishes criteria to evaluate “potential for success in research leading to publication in peer reviewed journals.” If the committee doesn’t recognize that the position is expected to build interdisciplinary research programs, the criteria may not adequately address predictors of success in relationship-building, collaboration, navigating differences, etc.
- Unnecessary rigidity—not allowing several ways to meet a qualification
- Narrow view of how the qualification may be met that excludes capable candidates. Examples include scholarship, scholarly potential, and measures of scholarly merit such as publication counting, and favoring the “best” journals or “prestigious” institutions;
- Inconsistent prioritization – failure to agree on relative importance of qualifications;
- Waiting too long—advertising before establishing criteria correcting qualifications that we discover are problematic; failing to establish criteria before reviewing applicant files (even informally) leads to cognitive bias.

Premises

- **Required qualifications** are necessary to perform the essential functions of the position. Some are evaluated at the application stage, but others are only evaluated accurately at the interview and/or reference check stage. All required qualifications must be met.
- **Preferred qualifications** predict better performance in the position.
- Each qualification is evaluated individually/separately
- Not all qualifications are equally important

- Determining why a qualification matters and defining how a candidate can meet it *before* screening begins will help mitigate bias

Screening criteria strategies

Use the Search Advocate Criteria Development Matrix (Appendix C) to record the results of your discussion at this stage. This process has several benefits—it helps identify and reduce structural bias in the qualifications, provides a tool to help committee members mitigate cognitive bias during screening and selection, and serves as a blueprint for the remainder of the search/selection process. Discuss *each* required and preferred qualification in depth, covering these topics:

- 1. Relationship to the job** – purpose is to understand the qualification and confirm whether it is required, preferred, or unnecessary:
 - What parts of this position require it? Why do they need it?
 - How is it used on the job?
 - What would be difficult or impossible to do without it?
 - Is this qualification a proxy for specific performance skills? If so, are they included in the qualifications separately...and should they be?
 - Why is it important? Why does it matter?
- 2. Screening criteria** – purpose is to broaden our understanding of how to meet the qualification in order to reduce structural bias:
 - What will meet this qualification? And what else? And what else??
 - Could a candidate meet it by [suggest a different approach]? Would you consider [suggest ANOTHER approach]?
 - Do we know someone (who isn't interested in this job) that would be an excellent candidate, but wouldn't qualify because of the way we are defining this qualification? How can we correct this error?
 - What set of strengths might we miss by limiting ourselves to the criteria we've developed so far for this qualification?
 - What cognitive or structural biases might be influencing our thinking?
 - How can we expand our definition of what it means to meet this qualification so it is more inclusive?
- 3. Transferable** – purpose is to increase inclusion by identifying skills that could come from a different context/atypical career path:
 - Is this a portable skill that might be acquired and used in multiple settings (professional, educational, social, personal)?
 - Is this a performance skill – that is, a skill someone uses in approaching work rather than a technical/job-specific skill? (Virtually all performance skills are transferable)
- 4. When to assess** – purpose is to ensure equitable screening and avoid inconsistently giving only some candidates the “benefit of the doubt”:
 - At what stage will we assess this qualification?
 - If we assess at more than one stage, what are we looking for at each stage?

- At which stage will we eliminate applicants because we can confirm that they don't meet this qualification?
5. **Priority** – purpose is to determine which qualifications matter most
- Required qualification: How important is this *compared to other required qualifications?* (High/Med/Low)
 - Will someone who exceeds this qualification be better prepared?
 - Will someone who is stronger in this area be a better performer, or is this mostly a “threshold” to be met?
 - Preferred qualification: How important is this *compared to other preferred qualifications?* (High/Med/Low)

Use the resulting information to develop a matrix that lays out each qualification, why we need it, and the different ways we can tell that someone meets it. To be considered further, a candidate must meet the letter (and should meet the intent) of the minimum qualifications.

Good fit:

During the criteria development stage it is a good idea to begin discussing what the committee thinks would make someone a *good fit* for the position and the hiring unit. Without this conversation, *good fit* can be a powerful subconscious interest that has the unintended effect of favoring homogeneity or preserving the status quo.

This can be accomplished effectively by asking the committee to brainstorm a list all the characteristics that would contribute to *good fit*. Once the list is complete, ask them to identify which items are specifically related to the position itself, and which reflect their personal preferences. By the end of this process, the committee will define what *good fit* means in terms of specific performance skills,

- determine whether/how each skill is related to the position duties
- Review each characteristic for possible discriminatory impact
 - can you clearly explain what it means?
 - can you describe its relevance to the duties of the position?
 - would you be uncomfortable if others knew you considered it?
 - can you demonstrate how or whether each applicant meets it based on the information you have collected?
- Agree not to include preferences for personality characteristics like “sense of humor,” “informal communication style,” “good eye contact,” “firm handshake,” etc. that can be related to someone’s culture, gender, religion, ability/disability, or other identity characteristics.

By the end of the conversation, committee members should reach a shared understanding of “good fit” as a set of performance skills that are related to the job. Now is the time to consider whether they are thinking too narrowly about how the job must be done, and broaden their vision of how a person could succeed. Finally, they should develop a set of inclusive criteria by

which each of the performance skills can be evaluated. If this is done before the job is posted, performance skills may be listed with other qualifications in the advertising materials.

