

## Quick Checklists – Develop Screening Criteria

The criteria matrix is the Search Advocate Program's main tool for reducing bias. It's used throughout all stages of screening—initial review, interviews, and reference checks. Committees that focus on what candidates need to show by the end of the entire search process, not just at the application stage, will get the most value from this tool.

### Relationship to job:

- How does meeting this qualification predict successful completion of the job duties? What specific responsibility (or responsibilities) does it support? Please go beyond what is described in the job description to include context, strategic priorities, and other information that may be available from subject matter experts
- What will the appointee be able to do if they meet this qualification that they might not be able to do otherwise?
- Are you using this qualification as a “proxy” for certain skills? If so, what are those skills/experiences? Could they be listed as individual qualifications?
- Why is this qualification important?
- The relationship to the job is typically not fully described in the job description – you need the experience of subject matter experts to complete this section

**Transferable:** Could this skill have been learned in a completely different setting (personal, educational, or professional), and be adapted to be used in this setting?

### Screening Criteria:

- Given its relationship to the job, what experiences, accomplishments, or learning meet this qualification? Identify the broadest possible range of ways the qualification could be met
- If it could be assessed in the application, what **MUST** the candidate show you in their application – at a minimum – to meet the need?
- If it could be assessed in an interview, what **MUST** the candidate include in their answer—at a minimum—to meet the need? If appropriate go beyond *quantity* (such as number of years) to define indicators of acceptable *quality* in their performance or understanding.
- If specific interview questions are suggested, note them for possible future use.
- Ask “how else might someone meet this?”, “who might we miss?” and “What ways to meet this we have overlooked?” to capture the broadest appropriate range of criteria.

**REQUIRED Qualifications - Importance of exceeding minimum** - ALL required qualifications must be met. Prioritize qualifications for which exceeding the minimum requirements is strongly associated with better performance—these should be given high priority for deeper evaluation. In such cases "strength" is treated like a preferred qualification with specific evaluation criteria detailed in the "strength" column. Measurable qualifications like degrees or years of experience are usually lower priority – once a candidate meets these thresholds, no further evaluation is needed. Compare required

qualifications to each other to assign high, medium, or low priority based on how much exceeding the minimum is likely to predict better performance.

- ☐ **PREFERRED Qualifications - Priority level** – Prioritize those preferred qualifications that are the strongest predictors of better performance – they are high priorities for candidates to meet. Weaker predictors of better performance are medium or low priority. Compare preferred qualifications to each other to identify high, medium, and low priority preferred qualifications.
- ☐ **Strength:**  
For **High and Medium priority *Required* Qualifications**, what are indications that a candidate exceeds the qualification IN A WAY THAT WILL PREDICT BETTER PERFORMANCE IN THE JOB DUTIES? Go beyond quantity (how *much*) to include quality (how *well*).  
For **High and Medium priority *Preferred* Qualifications** you *may also* identify ways a candidate could meet or exceed each qualification to predict better performance (similar to required qualifications), or you may leave this field blank.
- ☐ **Stage(s) to Assess** - What is the first stage we expect to have enough information to assess this qualification for all applicants still under consideration? When will we be able to screen candidates in for meeting it? If it is high priority and will be evaluated at more than one stage, what are we looking for at each stage?

**OPTIONAL ADDITIONAL FIELDS** (column heads shaded green) – *these are fields Search Advocates find that committees sometimes add to the criteria matrix (during initial development or as the search progresses).*

- ☐ **Focus of Review at Each Stage** - specify what you'll focus on at each stage. For example, at first stage you plan to evaluate this qualification, you might look for evidence that the candidate meets the basic qualification. In subsequent stages, you might seek increasingly detailed evidence of their strengths using the **strength** criteria column.
- ☐ **Draft Interview Questions** - If you drafted potential interview questions to help you develop the screening criteria, record them in this column for future reference. You can use them as they are or revise/replace them when you prepare for the interview.
- ☐ **Indicators in Candidate Responses** - for each interview question you decide to use, specify what you want the candidate to address in their answer. Identify the key components of a complete response that will provide the information you need. This will help you ask consistent follow-up questions and obtain complete answers.