

Developing Screening Criteria: Step-by-Step Guidance

INTRODUCTION - Implicit bias research strongly suggests a need to invest time early in the hiring process for the search committee to reach a shared understanding of the qualifications of the job. The entire search committee participates in developing the screening tool, discussing what meets or demonstrates strength for each qualification, which qualifications most strongly predict better performance, and how/when to evaluate each qualification. Doing this before advertising double-checks the qualifications for effectiveness, allows them to be refined as needed, and uncovers structural bias. Rigorous accountability to the matrix at each successive stage helps mitigate cognitive *and* structural bias.

Qualification and Required or Preferred – Copy each qualification word-for-word from the job description, one qualification in each cell. In the second column, indicate *R* for required or *P* for preferred. Remember, a candidate **must** meet all required qualifications to be hired. Preferred qualifications predict better performance.

Relationship to Job – To understand how broadly we can evaluate/interpret a qualification, we must understand what it enables the appointee to do in the position. Which position duties require it? Why is it needed, how is it used in the job, what might be difficult or impossible without it? Does this qualification tie directly to duties described in the job description, or have we failed to show the part of the job this qualification supports? Is it a proxy for skills not otherwise articulated? If so, what skills? Might it be better to list them individually?

Transferable? -- Is this a transferable skill? Transferable skills are portable skills that one can learn in any setting (professional, personal, or educational) and take to any other setting; when a skill is transferable, the screening criteria are highly flexible.

Screening Criteria – This column broadens our understanding of how candidates may meet each qualification, so we can consider more candidates and those who are qualified less typical ways. Given its relationship to the job, what experiences, accomplishments, or learning meet this qualification? If it could be assessed in an interview, what **MUST** the candidate include in their answer—at a minimum—to meet the need? Go beyond *quantity* (such as number of years) to define indicators of acceptable *quality* in their performance or understanding. Ask “who might we miss?” and “What ways to meet this we have overlooked?” to broaden the criteria.

Complete these first columns for all required and preferred qualifications before continuing to Priority.

Priority – How important is *strength* in this qualification compared to *strength* in other qualifications? Required qualifications: If meeting a qualification *strongly* (vs. minimally) strongly predicts *better* performance, it is a *high priority* for the committee to spend more time evaluating. Conversely, once an objective numeric qualification is met, there is no need for the committee to spend more time on it; it is *low priority*. Preferred qualifications: Those that most strongly predict better performance are *high* priority. Those that least strongly predict better performance are *low* priority. *High, medium, and low* priority apply to both preferred AND required qualifications.

Strength – For medium and high-priority qualifications, what are indications that a candidate meets them *strongly* (beyond just meeting them) in relationship to the job? What *ways* of meeting (or exceeding) the qualification predict better performance? Go beyond quantity (how *much*) to include quality (how *well*).

When to Assess – at what stage will we have enough information to assess this qualification for all applicants? If it is high priority and will be evaluated at more than one stage, what are we looking for at each stage? When will we eliminate candidates for not meeting it?

Job Title:

Full Consideration Date:

Final Posting Closing Date:

Qualification	Required or Preferred?	Relationship to job – <i>What parts of the job does this qualification support? Why is it needed/how is it used? What might they not be able to do without it?</i>	Transferable	Screening Criteria – <i>what are the different ways someone might meet this qualification?</i>	Priority – <i>relative importance</i>	Strength – (for medium & high-priority qualifications) <i>what are indicators that someone meets the qualification strongly? – what ways of meeting it predict better performance?</i>	When to Assess <i>(and eliminate for not meeting)</i>
					Low Medium High		Application Video/phone interview Site Interview References
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