
TIPS AND GUIDELINES FOR DEVELOPING AND USING CANDIDATE EVALUATION FORM

Below is a list of tips and guidelines for using a candidate evaluation form. However, this not meant to be a one-size-fits-all approach. The following guidelines should be used as a tool and resource for best practices, not a requirement. Please feel free to adapt based on the unique interests and dynamics of your team and search.

- Criteria should be based on candidate evaluation matrix developed by hiring team and search committee.
- **Questions Matter:** Interview (phone and in-person) questions should directly correlate to specific criteria and competencies being rated on the form. Refer to *Candidate Evaluation: Competencies and Criteria* for examples of competencies and related questions.
- **All members on search committee** should help **define and confirm expectations** and components of a “quality answer” prior to starting the candidate evaluation process.
- **Hold each member accountable** to be consistent in rating. Discuss with your committee what defines each rating, e.g., what is the difference between a 2 and 3.
- **Discuss** multiple ways candidates can meet or demonstrate the criteria prior to screening, but be consistent and equitable.
- Include brief descriptors or indicators for each criteria being evaluated (can pull directly from evaluation criteria matrix).
- **Check-In.** Briefly review criteria and expectations prior to all interviews to ensure consistency.
- **Assume Bias. Audit your Bias.** Ask yourself and committee:
 - What ways have we already excluded or endorsed this candidate? Why?
 - Could our “schemas,” assumptions, or biases be affecting our rating?
 - Do we have the information we need to make this conclusion?
 - Are there attributes about this person such as style or appearance that positively or negatively influence my overall impression?
- **Identify top competencies** and high priority requirements (not all criteria will be weighted the same).
- Prior to rating, **create three groups** in which to rank candidates. Consider using Minimally Qualified, Qualified, or Highly Qualified.

- Ratings should be used for **consistency and documentation** purposes only. Total scores should not be used as the sole deciding factor.
- Allow time to discuss rating and **debrief immediately** following the interview. Discuss any differences in ratings and be sure to consider all perspectives.
- **Discuss strengths first.** Discuss strengths and any potential skills gaps and challenges for each candidate. Reference the pre-determined criteria when discussing ratings and candidates.
- **Don't hold candidates to individual "scores."** Use ratings to help assess each candidate's qualification to the criteria and scores to help group candidates into minimally qualified, well qualified, or highly qualified.
- Consider using a **group range vs individual ranking system** when grouping candidates, e.g., all candidates with scores totaling 15 to 20 will be considered top-tier or highly qualified. After groups are identified, audit the diversity of your "highly qualified" pool.
- **If top-tier pool lacks diverse representation**, consider if bias could play a factor in initial rating. Take another look at the ratings of candidates on the cusp or in the mid-tier. Some questions to consider:
 - Were all candidates rated equitably?
 - Do we see any trends that may indicate bias e.g., similar education or work background or mostly internal candidates?
 - Are there some candidates in the mid-tier that rated high in the "high-priority" criteria and competencies that could be moved up?
 - Would slightly broadening the range increase the diversity of top-tier, e.g., expanding top tier range from 15-20 to 14-20?
- **Select** the candidate that is most qualified for the role. Most qualified does not automatically mean most educated (formally) or most years of experience. Nor does it mean the candidate with the overall highest score. Most qualified refers to the candidate who is able demonstrate they meet or exceed the criteria for the role, and who also who brings a culture add or unique expertise to the position and department.