Appendix 11: Sample Matrices and Scorecard

**Identifying and Weighting Criteria**

Use this chart to identify required criteria, including how the committee will accept demonstrated evidence as well as the weight each criteria holds.

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| --- | --- | --- | --- |
| **Core Criteria** | **Description** | **Evidence** | **Rank/ Weight** |
| **e.g., Excellent researcher** | Science of outstanding quality  Strong, respectful protocols for working with research populations  Track record of effective knowledge translation  Substantial body of literature as a senior author  Substantial success in attracting peer-reviewed research funding | Research awards, recognitions, etc.  Funding history  Research protocols  Committee’s assessment of publications/research | 40% |
| **e.g., technical skills in xyz** | Able to use XYZ to produce findings; able to explain XYZ to colleagues/ collaborators/students; able to manage a project that uses XYZ | Has managed a project/ conducted research/published/etc. using xyz | 20% |
| **e.g., manage/ supervise a team** | Proven excellence in teaching and mentoring of diverse students | Syllabi; references | 20% |
| **e.g. Respectful and collegial** | Work experiences detail communication, dealing well with conflict, bridging differences and treating coworkers, supervisors & students well | Responses to questions indicate: skill in addressing conflict in a respectful manger; demonstrates strong listening skills and ability to communicate in a respectful way; references | 20% |

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| **Asset Criteria (max. 3)** | **Description** | **Evidence** | **Rank/ Weight** |
| Ability to teach in XYZ area | Able to develop new courses/ pick up existing courses | Course and research areas; interest | 1 |
| Administrative experience | Able to chair [type of committees]/ assume Chair role in future/ other | Expressed interest; experience | 2 |

**Keep in Mind … good criteria:**

* Reflect the core responsibilities—key things someone needs to do well to succeed in this role
* Identify what is needed within an evolving unit—look to the future as you identify these
* Focus on what someone needs to do, not their qualifications to do it. This means integrating transferable skills and equivalencies
* Are unbiased and open to a diversity of persons—have others review criteria for unintended biases
* Are fleshed out: have a description, identify the evidence someone will need to show that they fulfill the criterion, are given a relative weight
* Are developed by the committee as a whole and understood by each member of the committee
* Not too broad or too narrow: Describe the main elements sought

**How to use the criteria:**

* They are the basis for every decision the committee makes.
* Design interview, questions and assessment tools to assess criteria in a robust manner. Ensure you have some way to gather evidence for each criterion.
* At every stage, record information and scoring for candidates relative to the criteria (see next template).
* Ask everyone who provides feedback on the candidates to review these and provide feedback in relation to the criteria.

**Tracking Criteria Across a Search**

This tool can help committees avoid biased decisions. It encourages them to pay attention to all the evidence about each candidate, ensuring more holistic, accurate evaluations.

**Candidate:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Cover Letter** | **CV/ Resume** | **Other materials** | **Interview** | **Presentation** | **References** | **Other** | **Summary: strength of criterion** |
| **Core Criteria** | | | | | | | | |
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| **Asset Criteria** | | | | | | | | |
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**Steps:**

* Indicate whether the criterion has been demonstrated by devising a simple scale, defining each level carefully. E.g., *strong*, *adequate*, *weak* or *not noted*; Present or absent; or your own scale.
* For each cell, indicate how much that criterion is present in that set of materials.
* When evaluating, focus must be on the evidence drawn directly from the recruitment process. The score is a blunt instrument intended to aggregate data and make distinctions clear. When working within the short-list, the score should help focus where discussions are needed regarding evidence of suitability. Refer back to the evidence from the recruitment process to verify it matches the scoring and compare across candidates.
* Look at every column in determining how well a candidate meets each criterion, not just the most recent or interesting.

**Benefits and ways this reduces bias:**

* Gets committee to review every source of information, not just select ones
* Keeps focus on criteria rather than the candidates’ personality or “fit”
* By looking back at evidence from all application materials, avoids the “recency effect” whereby newer information is given more weight
* Balances out the impact of strong personalities during the interview

Adapted from *Template: Tracking Criteria Across a Search,* Equity & Human Rights, University of Victoria, 2019

**Keeping Score**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Assessments | Weight % | Candidate A  Raw Score | Candidate A  Weighted Score | Candidate B  Raw Score | Candidate B  Weighted Score |
| Video Interview | Pass/Fail | Pass | - | Pass | - |
| On-Site Interview | .40 | 79 | 31.6 | 82 | 32.8 |
| Teaching Presentation | .30 | 87 | 26.1 | 81 | 24.3 |
| Research Presentation | .30 | 87 | 26.1 | 86 | 25.8 |
| Total | 100 |  | 83.8 |  | 82.9 |
| Canadian Citizen/ Permanent Resident (Yes/No) |  |  | NO |  | YES |

This example shows an appointment committee has determined the ”Video Interview” component of the recruitment process to be scored on the basis of pass or fail, that is, passing simply allows for the candidate to move to the next stage. Alternatively, this assessment can be assigned a weight. The scoring must be determined before the recruitment process begins.

In this example, the employment offer should be made to Candidate B, as this candidate is a Canadian citizen or has permanent residence status.

The scoring must be an accurate reflection of the evidence demonstrated throughout the recruitment process and discussions should re-engage focus on the demonstrated evidence and candidate suitability.

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| --- | --- | --- | --- | --- | --- | --- |
| Candidate Interview Scoring Matrix | | | | | | |
| Position: |  | Depart/Faculty: | |  | | |
| Applicant Name: |  | Date: |  | | Interview Time: |  |

|  |
| --- |
| **Scoring Key**  **0 to 1** Responses include *few*  components of the ideal answer  **1.5 to 2** Responses include *many*  components the ideal answer  **2.5 to 3** Responses include *almost all/all* components of the ideal answer |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Criteria** | **Question** | | **Response** | **Components of the ideal answer** | **Raw Score** | **Weight** | **Weighted Score** |
| **Education** |  | |  |  | **3** | **3** | **9** |
| **Diversity** |  | |  |  | **2.5** | **3** | **7.5** |
| Total Interview Score: |  | | | | | | **16.5** |
|  |  | | | | | | |
| Weight: |  | **0 =** Not relevant to the assessment of knowledge, skills or abilities  **1** = Has indirect relevance to the assessment of knowledge, skills or abilities  **2** = Is relevant to the assessment of knowledge, skills or abilities  **3** = Has important/direct relevance to the assessment of knowledge, skills, abilities | | | | | |

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| --- | --- | --- | --- |
| Panel Member Name: |  | Panel Member Signature: |  |