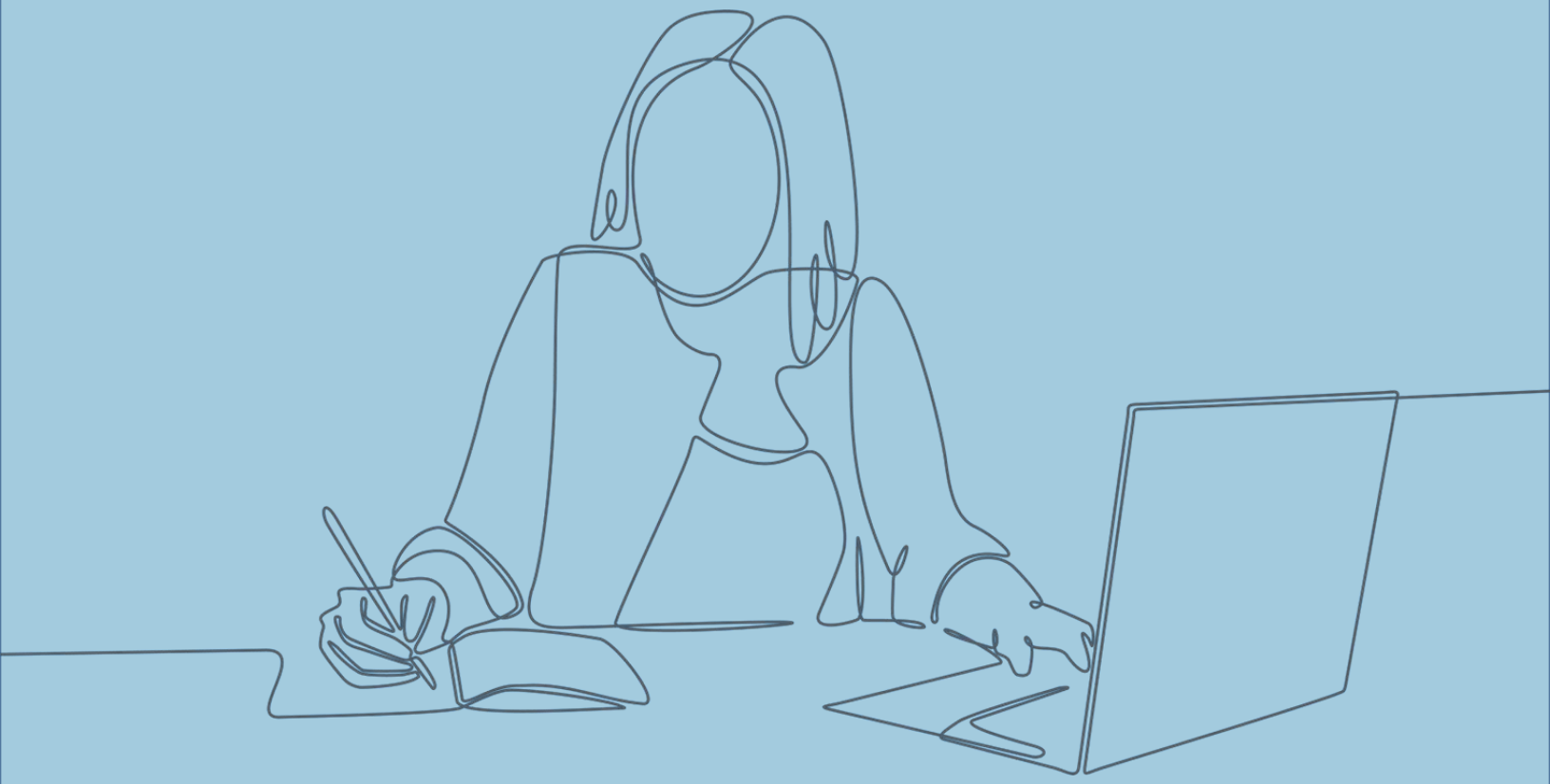
Human Resource



QUICK REFERENCE GUIDE (QRG)

How to Effectively Evaluate Candidates to Make a Final Selection

Assessing Candidates Effectively to Make Good Decisions

Yale *Learn and Grow*

FUNCTIONAL LEARNING

This Quick Reference Guide (QRG) is designed to support **Talent Acquisition (TA) Partners** and **Hiring Managers** through the process of evaluating candidates and making a primary candidate selection to move forward in the recruitment process.

By the end of this learning, you will:

- Identify your role and responsibilities as a **TA Partner** and **Hiring Manager** in evaluating candidates, following Hiring Manager interviews, and then selecting a primary candidate to move forward within the recruitment process.
- Recognize the key steps the TA Partner and Hiring Manager must take to evaluate candidates in a fair way and ultimately select a primary candidate that is best suited for the job opening.
- Apply best practices that aid in TA and Hiring Manager / Department collaboration that leads to conducting a fair review of all candidates interviewed and then selecting a primary candidate, all in alignment with the Yale's Mission, and Values.

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AUDIENCE AND PURPOSE

Audience and Purpose

This learning is for **TA Partners** and **Hiring Managers**. It demonstrates the partnership and steps they must take to evaluate candidates effectively and make a final primary candidate selection to move forward in the recruitment process.

Evaluating candidates fairly to make the best final primary candidate decision possible is the final step in the Candidate Evaluation and Selection Process within the overarching Talent Acquisition Recruitment Process. After all interviews are completed, candidates should be individually evaluated before next being evaluated against other candidates through a side-by-side comparison. This helps ensure fair final decisions are made to move forward in the recruitment process. This process determines who the primary candidate is as well as who is a runner-up/silver medalist candidate.

The integration of each team member's subject matter expertise is outlined in this learning. Team members must effectively collaborate to support the process, which will lead to fair, unbiased evaluations and the ultimate identification of a final primary candidate who meets the Department's hiring needs.

UNDERSTANDING THE CONCEPT

Why is it important to conduct proper evaluations before making a final selection**?** A fair, transparent candidate evaluation process is a cornerstone of effective hiring strategies and practices. It not only supports the TA Team and their Departments in making the best decisions possible but also protects the Candidate Experience and fosters trust among job applicants.

Some Best Practices for Consideration

When beginning your evaluation and selection process:

- Ensure you clearly understand the criteria for success-i.e., the critical skills and abilities needed to do the job as outlined in the job description/job ad.
- Do proper preparations by ensuring you have gathered all the relevant data and notes needed to conduct a fair assessment.
- Avoid biased ways of thinking that may impact your ability to be objective and fair in your evaluation.
- Seek feedback from multiple sources so that you are taking multiple perspectives into consideration to inform your evaluation and selection.
- Encourage dialogue from those multiple sources by sharing your point of view as well as asking clarifying, open-ended questions.
- Follow up as needed, not letting any questions go unanswered.

Remember that it is in everyone's best interest to ensure that all candidates are evaluated and assessed fairly. This leads to sound decisions and allows Yale to hire faster and simpler, resulting in more successful recruitment of incredibly talented and diverse employees.

Special Considerations for Testing

- At Yale, most departments do not have unique testing requirements. If a department does have testing requirements, these should be discussed upfront, ideally during the Recruiting Strategy Discussion (RSD) and/or before the job ad gets posted.

- Hiring Managers should discuss new testing needs with their manager and HR Partner prior to discussing it with Talent Acquisition. Per Yale policy, no screening or placement tests may be given without the specific authorization of Human Resources.

For any more questions, consult with your HR Partner.

STEP-BY-STEP PROCESS

1. Interviews are Completed

Once all Department interviews have been conducted, the Hiring Manager should immediately notify their TA Partner. To ensure we are fair in our hiring practices, all interviews should be completed before candidate evaluations are conducted.

Some Best Practices for Consideration

- The Hiring Manager should always inform the TA Partner once the interviews are complete. This is to ensure TA Partners can continue to drive a positive candidate experience—i.e., they will be answering any remaining questions the interviewees may have as well as seeking their feedback on how interviews went.
- If either the TA Partner or Hiring Manager are not being informed in a timely manner, they should loop in the HR Partner, as necessary, to assist with any roadblocks.

2. TA Partner Provides Guidance and Resources for Candidate Evaluations

The TA Partner reaches out to the Hiring Manager, asking them to complete their evaluations within 1 day of completing interviews. The TA Partner re-shares the Candidate Evaluation Tool (if necessary) to the Hiring Manager. The TA also provides the Hiring Manager with the following guidance:

- Ensure all interview notes and feedback have been collected and reviewed, including from those involved in interviews-i.e., the **Interview Panel.**
- Fill out the Candidate Evaluation Tool individually for each candidate interviewed, then conduct a side-by-side comparison of all candidates.
- Do not make any final decisions until a side-by-side comparison has been conducted of all candidates interviewed.
- Ensure appropriate notes are captured within the Candidate Evaluation Tool so that final decisions are justified and given proper context.
- When conducting evaluations and making final decisions, always ensure that they are aligned with Yale's Mission, Values, Goals, and Objectives.

The TA Partner should proactively offer to meet with the Hiring Manager to help them with their candidate evaluations and selection decisions.

Some Best Practices for Consideration

- If a Hiring Manager needs more resources, they should be given additional support and supporting tools by the TA Partner, like the **Interview Guide and Evaluation Tool Instructions**.
- If a regular meeting cadence was established and agreed upon between the TA Partner and Hiring Manager (during the **Recruitment Strategy Discussion**), the discussion about candidate evaluations and final decisions could happen during this time.
- The Hiring Manager should always inform the TA Partner of their candidate evaluation and selection progress. That's to ensure the TA Partner can keep candidates informed about their application status, even if it is just letting them know that final decisions are still being made.

Understanding the Terminology

- **Candidate** – An applicant who has been screened and deemed eligible (qualified) for future consideration.

- **Panel** – A group of people who will interview a candidate. Ideally, the number of interviewers at an interview should not exceed more than three. This is because it puts the candidate at ease as they can make eye contact with each person so that each panelist can ascertain if the candidate is suitable or not.

3. Candidate Evaluations Are Completed

The Hiring Manager completes an assessment for each individual candidate interviewed and then conducts a side-by-side evaluation of all candidates. The "candidate comparison" sheet of the Candidate Evaluation Tool is helpful in making good decisions. Ensure appropriate notes are captured within the tool so that final decisions are justified and given proper context (including **non-finalist, finalist candidate,** and **runner-up/silver medalist** recommendations and/or decisions).

Some Best Practices for Consideration

- As candidates are being evaluated, focus on a candidate's behaviors and actions, and how well they can perform the essential tasks of the job. Do not focus on less important factors like likeability or personality traits to keep an objective lens in selecting the best person for the job.
- Hiring Manager evaluations should not move back and forth between individual and side-by-side evaluations so as not to introduce biased thinking like **recency bias**.

Understanding the Terminology

- **Non-Finalist(s)** – Candidate who has not been down-selected but may still be a viable candidate for other roles within Yale. Not all candidates are viable for other roles.
- **Finalist**– Candidate who has been down-selected and deemed a potential for hire and offer of the role.
- **Runner-Up/Silver Medalist – A backup** finalist candidate in the event a primary candidate falls through.

4. Conduct Calibration Sessions AS NEEDED

If the Hiring Manager is having difficulty assessing candidates and making a final decision, it is highly recommended that they schedule a calibration session with their Interview Panel, TA Partner, and HR Partner, if applicable. During the calibration session, the Hiring Manager should seek out differing perspectives to validate their evaluations and/or scoring.

The TA Partner and/or HR Partner can guide the Hiring Manager and their panel through the calibration session, facilitating as needed, to ensure everyone's point of view is heard.

Following that calibration session, the Hiring Manager should update their Candidate Evaluation Tool with validated notes and interview evaluations. The Hiring Manager should leverage these updated notes, evaluations, and/or scoring to finalize their side-by-side comparison and/or final selection.

Some Best Practices for Consideration

- Not all panel interviews occur in a group setting. Therefore, a panelist may be evaluating question(s) differently depending on whether they are interviewing alone or as a group. This may impact interview debriefs as well as calibration sessions—e.g., notes, evaluations, and/or scoring alignment. Therefore, it is the Hiring Manager's responsibility to set expectations upfront with their panel before going into these kinds of meetings. When in doubt, the Hiring Manager should seek advice from their TA Partner and/or HR Partner.
- If the HR Partner was involved in any way during the Candidate Evaluation and Selection process, they should also participate in all activities, including calibrations.

- If either the TA Partner or Hiring Manager are not being informed in a timely manner, they should loop in the HR Partner, as necessary, to assist with any roadblocks.

Understanding the Terminology

- **Calibration** – Occurs after all interviews (and debriefs) are complete to conduct individual and then side-by-side evaluations of candidates. Calibration ultimately leads to Finalist decisions.

5. Final Decisions Are Made

Based on their completed evaluations, the Hiring Manager determines if a primary candidate has been identified. If a final selection has been made, the Hiring Manager should immediately inform their TA Partner and provide them with their completed notes, evaluations, and scoring so that the further recruitment process can quickly move forward (i.e., testing, reference checks, background checks, etc.)

One of three designations can be selected for each candidate evaluated, using the Candidate Evaluation Tool:

- Forward to Offer – This is the primary candidate that the Hiring Manager wants to move forward with.
- Runner-up Candidate – This is a back-up/silver medalist candidate that the Hiring Manager wants to make an offer to, should the primary candidate fall through.
- Not Selected – This is a non-finalist candidate that the Hiring Manager no longer wants to pursue and will be filtered out of the pipeline.

If a primary candidate has **not** been identified, the Hiring Manager and the TA Partner should quickly work together to identify another slate of candidates to review and/or interview. The Hiring Manager should continue to hold on to and complete the Candidate Evaluation Tool after each round of interviews until a primary finalist candidate is identified. Lastly, the TA Partner should ask for feedback from the Hiring Manager on what can be done better as new candidates are sourced and vetted for the slate.

IMPORTANT! Recruitment activity cannot move forward without completed notes, evaluations, and scoring (via a completed Candidate Evaluation Tool). Ensuring that final decisions made are justified with proper documentation will safeguard all parties involved in the candidate evaluation and selection from risk.

Some Best Practices for Consideration

- Up to this point, Hiring Managers should have been disposing of candidates in the Yale Talent Network throughout the process. For more information on how to appropriately disposition candidates and communicate with them, refer to **How to Properly Disposition and Communicate to Candidates**.
- A finalist selection should not be made until all individual candidate evaluations are completed and a side-by-side comparison has been done; conducting this activity prematurely can lead to biased thinking and decision-making.
- If the Hiring Manager identifies non-finalist candidates who would be suitable for other roles at Yale, they should denote this in their completed Candidate Evaluation Tool and inform their TA Partner immediately so that their resume can be considered for other roles at Yale.

- All candidates, regardless of their final standing in the evaluation process, should be promptly informed of their application status to maintain a good candidate experience.

Understanding the Terminology

- **Disposition –** Changing an applicant's or candidate's status in Yale Talent Network during the recruitment process, including moving them forward or removing them from further consideration.
- **Dispositioning –** Informing a candidate (either via Yale Talent Network or personally) that they are no longer being considered for a role.

Special Considerations for L34/35/Union Roles

- If an L34 candidate has been selected as a final candidate and reference checks have been conducted, Hiring Managers must notify the TA Team in writing to proceed with an offer (include the requisition number, name of the selected candidate, and confirmation that references have been checked). Certain Departments may require that a selection form be submitted prior to proceeding with the offer process.

For any more questions, consult with your HR Partner and/or Labor Relations.

6. TA Partner Closes Out Evaluation Process

The TA Partner uploads the completed Candidate Evaluation Tool provided by the Hiring Manager in the Yale Talent Network. To maintain a good candidate experience, the TA Partner also contacts all candidates to keep them informed about their application status and next steps.

Some Best Practices for Consideration

- If the Hiring Manager has not moved forward non-finalist candidates and they are still qualified for other roles at Yale, the TA Partner should proactively pass their resume to other TA Team Members for consideration.
- Until a primary candidate has been confirmed for the role (i.e., passed reference checks, background checks, and accepted the offer), the TA Partner should keep runner-up/Silver Medalist candidates warm.

Understanding the Terminology

- **Keeping Candidates Warm –** Maintaining regular communication and engagement with the candidate throughout the hiring process.

Special Considerations for L34/35/Union Roles

- For internal L34 and layoff candidates, proper turndown communications must be used – i.e., must include a reason based on the requirements listed in the posting.

For any more questions, consult with your HR Partner and/or Labor Relations.

SUPPLEMENTAL MATERIALS

What's Next

Thank you for reading this QRG. To further supplement your learning, we recommend you review the **Interview Guide and Evaluation Tool Instructions** and **Candidate Evaluation Tool**.

Supplemental Learning

For a full listing of learning available:

- Quick Reference Guides
  - How to Effectively Evaluate Candidates and Make a Final Selection (printable version)
  - How to Have a Successful Candidate Slate Review
  - How to Schedule and Conduct Effective Interviews
  - How to Properly Disposition and Communicate to Candidates

Supplemental Tools

For a full listing of tools available:

- Tools
  - Candidate Evaluation and Selection Checklist
  - Hiring Manager Interview Guide
  - Interview Template
  - Candidate Evaluation Tool
- Sites
  - Manager Toolkit
  - Hiring Guide

GLOSSARY

For a full listing of terminology, click **here**.

Contact: learning@yale.edu

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