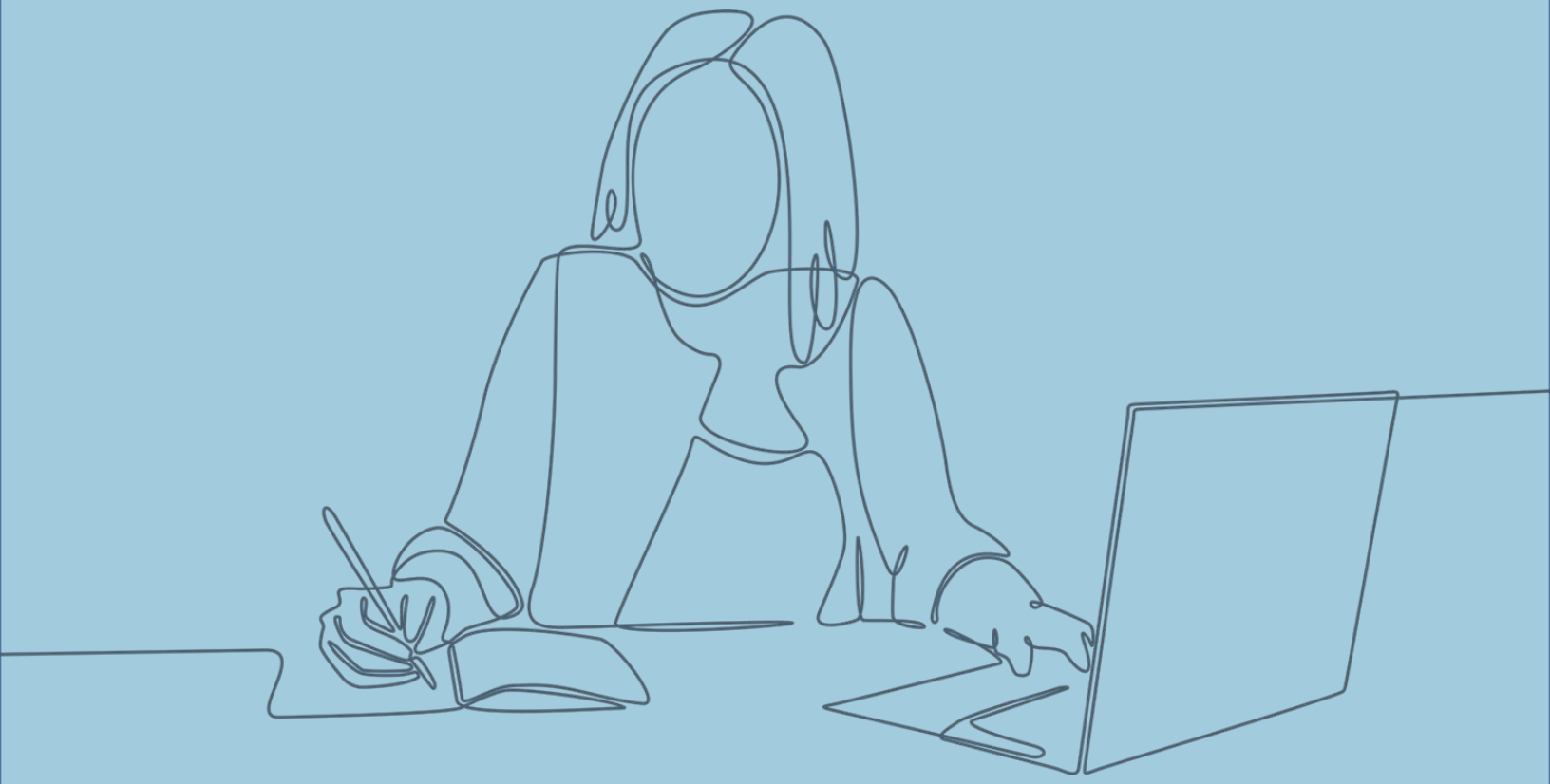
Human Resources



QUICK REFERENCE GUIDE (QRG)

Scheduling and Conducting Effective Interviews

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 scheduling, preparing for, and then conducting departmental interviews.

By the end of this learning, you will:

- Identify your role and responsibilities in Department interviews that take place between the candidate, the Hiring Manager, and their Interview Panel.
- Evaluate key steps that the TA Partner and Hiring Manager must take to prepare for and then conduct effective interviews, utilizing techniques and questioning methods that gather valuable understanding about a candidate's qualifications.
- Apply best practices that aid in TA and Hiring Manager/Department collaboration that strive to enhance the Interview Team's overall interviewing expertise, which ultimately leads to overall efficiency and quality of interviews.

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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 in the process necessary to effectively schedule, prepare for, and then interview candidates.

Interviewing candidates effectively to ensure a good understanding of their skills and abilities is a critical step within the Candidate Evaluation and Selection Process within the overarching Talent Acquisition Recruitment Process. After the Hiring Manager has selected which candidates to move forward with, it is important that they quickly schedule departmental interviews to maintain a positive Candidate Experience.

The integration of each team member's subject matter expertise is outlined in this learning. It provides guidance from the moment scheduling of the interviews occurs through the interview debrief. It contains helpful guidance throughout the process, including role clarity, tips to avoid bias, and reminders to update the appropriate systems.

STEP-BY-STEP PROCESS

Once the **Hiring Manager** has made decisions on which candidate(s) to move forward with for the interview, the following steps should be followed for scheduling and interviewing the candidates.

1. Interviews are Scheduled (Based on the Department's Process)

The Hiring Manager follows the appropriate "interview scheduling" process of their Department. At Yale, each Department may have a specific process for conducting interviews. Given their expertise, the TA Partner should provide guidance to the Hiring Manager (and their **Interview Panel**) and ensure the consistent and quick scheduling of these interviews.

Interview Availability

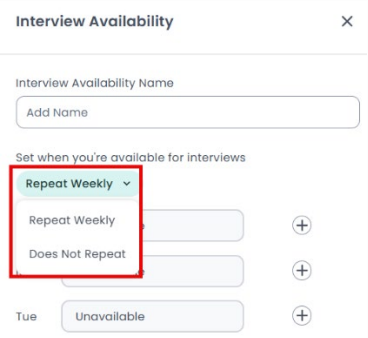
Note: The Hiring Manager can update their interview availability and override other meetings on their work calendar by selecting Interview Availability before sending the invite to a candidate for an interview. **Note: For Interviews to show on the work calendar, you must choose to override other meetings first.**

To update your interview availability:

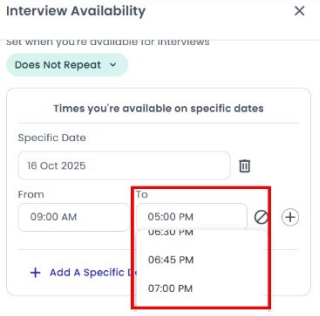
Click on the **calendar** in your home view on the top right.

Click on the **Create** button.

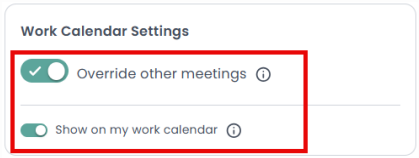
Click on the **Set when you're available for interviews** drop-down menu. If you do not want it to repeat weekly, select **Does Not Repeat**.



Select the **Date and Time**.



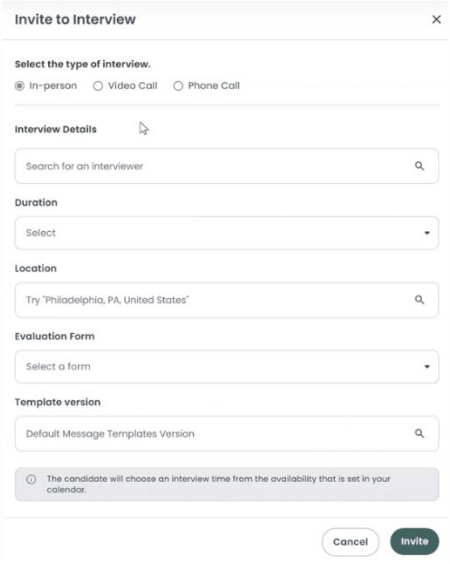
💡 **Important**: If you want the interview availability to show up on your work calendar, you **need to select Override other meetings** and then **select Show on my work calendar**.



Click **Add** to complete the above Interview Availability.

To invite a candidate to an interview:

Select the type of interview you want to conduct (in-person or phone call) and fill out the details. Select the Invite button to send the candidate a list of available times and/or dates.



IMPORTANT! As they are scheduling the interviews, the Hiring Manager should be asking the candidate if they have any accommodation needs, including whether they would prefer interacting via phone (to account for candidates without technology like webcams or high-speed internet). This is important as it creates an inclusive experience for the candidate.

Interview Request Template

Subject: Interview for [Position] at Yale University

Dear [Candidate's Name],

Thank you for your interest in the position of [job title] at Yale University. We were impressed by your application and are excited to invite you to the first stage of the interview process. of time].

The interview will be conducted [on the phone/online/in person] and will take approximately [length of time]. In this interview, we'd like to learn about your work experience, skills, and career goals. We will also share more information about the position and the university and provide time for you to ask questions.

Please let us know if any of the following dates and times work for you:

- [Date and Time]
- [Date and Time]
- [Date and Time]

If none of these work for you, feel free to reply to this email to suggest other dates and times that would work for you.

As always, we want to ensure that you have a comfortable experience during the interview, so if you need any accommodations or have any special requirements, please let us know in advance so we can make the necessary arrangements.

We look forward to hearing back from you soon.

Sincerely,

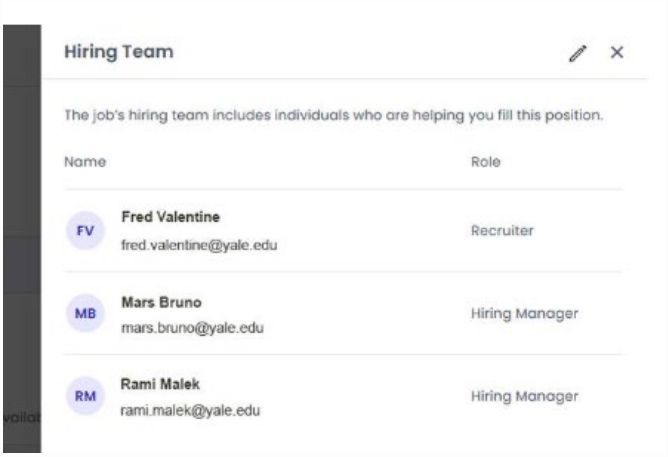
Some Best Practices for Consideration

- 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**.
- If a candidate has been spoken to by someone from TA or the Department, **they should be promptly informed of their application status and next steps** to maintain a good candidate experience.
- To **create an inclusive and transparent experience**, both the TA Partner and the Hiring Manager should always share details of the hiring process and any expectations to set candidates up for success.
- The conduct of a panel interview versus an individual interview should be **determined during the Recruitment Strategy Discussion**. The Hiring Manager should consult internally with their Department to see if there is a preference between panel and individual interviews. Panels aren't required but may be considered based on Hiring Manager/Department preference, job type, stage of interview process, number of interviewers, etc.

For the Hiring Manager:

- **The Hiring Manager is ultimately accountable and responsible for scheduling interviews within their Department**. Based on their specific Department processes, they must coordinate their "Hiring Team" with their administrative support, Lead Admin, and Interview Panelists as needed. They should also be proactively communicating with the people

involved in interviews to keep their calendars up to date so as not to encounter scheduling issues.



- The Hiring Manager should have been dispositioning candidates in the Yale Talent Network (YTN) throughout the process. For more information on how to appropriately disposition candidates and communicate with them, refer to the **How to Properly Disposition and Communicate to Candidates—HM Version**.

For the TA Partner:

- The TA Partner should proactively reach out to the Hiring Manager to stay informed about interview scheduling progress.
- If a meaningful **Recruitment Strategy Discussion** occurred prior, the TA Partner should already be aware of their Department's specific interview practices, including who will be involved in interviews and whether the HR Partner should be part of the panel (i.e., for Exec interviews / key roles).
- If the TA Partner is made aware of who is going to be interviewed, they can promptly connect with those candidates and prepare them for upcoming interviews.

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.

2. Be Accommodating with Candidate Responses

The Hiring Manager should be prepared to wait for a candidate to respond to the scheduling request. A standard 24-72 hours (1-3 business days) is typically an appropriate time to allow candidates to respond. If the allotted time has passed and the Hiring Manager feels the candidate is being unresponsive, they should immediately reach out to their TA Partner for assistance. Also, throughout this process, the Hiring Manager should continue dispositioning candidates in the YTN.

Some Best Practices for Consideration

- The Hiring Manager should have been dispositioning candidates in the YTN throughout the process. Refer to the **How to Properly Disposition and Communicate to Candidates** for more information on how to appropriately disposition candidates and communicate to them.
- The Hiring Manager should always inform the TA Partner of their interview scheduling progress. The purpose is to ensure the TA Partner can keep candidates informed about their application status, even if it is just letting them know that decisions are still being made.

Special Considerations for L34/35/Union Roles

- It is important to **follow the appropriate protocol for the position**. 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.

3. The Interview Schedule Is Shared

Once determined, the Hiring Manager shares the final interview schedule and any next step details (i.e., completed interview template, meeting logistics, request to hold a prep session, etc.) to their panel and the candidates, all while copying their TA Partner. The TA Partner should always be copied and kept abreast of progress so that they can provide guidance to the Hiring Manager (and their Interview Panel) as well as ensure a positive candidate experience is maintained.

Some Best Practices for Consideration

- Once the interview schedule is finalized, it is in the Hiring Manager's best interest to start preparing for interviews. Depending on the last time they hired for a role, it might take some time to start thinking through the specific questions they will want to ask the candidate.
- The TA Partner should proactively offer to meet with the Hiring Manager to help them with their interview preparations. 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, and the Interview Template.

4. Everyone Prepares for Interviews

Prior to the interview, it is in the best interest of all people involved to prepare. This ensures that interviewees have a positive experience and that no careless practices are perpetuated.

Prior to the interview, the TA Partner will support and advise the Hiring Manager to:

- Review the Interview Guide and Evaluation Tool Instructions.
- Complete the Interview Template.
- Share the completed Interview Template with their panel.
- Schedule an interview prep session with their panel.
- Ensure debriefs occur after interviews.

Before the day of the interview, the TA Partner will support the Hiring Manager (and their Panel) by helping co-facilitate the prep session, where the following items should be discussed:

- Agenda and timing.
- Candidate interview accommodations or requests (if they denoted any).
- Questions to be asked (contained in the completed Interview Template).
- Roles and responsibilities – i.e., Who will ask which question(s).
- What to say versus not say.
- Scoring and evaluation expectations.
- Debrief expectations.
- Any other tips and methods to drive a positive candidate experience.

The TA Partner should proactively offer to meet with the Hiring Manager to help them with interview preparations.

Some Best Practices for Consideration

- If a regular meeting cadence was established and agreed upon between the TA Partner and Hiring Manager (during the **Recruitment Strategy Discussion**), any guidance and preparations can happen during this time.
- If either the TA Partner or Hiring Manager are having difficulties with preparations, they should loop in the HR Partner, as necessary, to assist with any roadblocks.
- Coming into the prep session, the Hiring Manager (and the TA Partner, if invited) should get to know the individual panelists and their areas of expertise. This is so that each panelist can be best utilized for their perspectives during the interviews and debriefs as well as when candidate evaluation and selection activity begins.
- Proper preparation of the Panel includes clearly determining roles and responsibilities including who should be asking which question. It is important to do this so that duplicate questions are not asked during the interview itself.
- 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.

5. Department Interviews are Conducted

The Hiring Manager leads and oversees the interview process with full participation from their Panel. To ensure a fair evaluation and good decisions are made, all participants must leverage the pre-populated Interview Template to take detailed, objective notes. As needed, the TA Partner will provide guidance and expertise as interviews are conducted to ensure a positive candidate experience.

Some Best Practices for Consideration

- Conduct standardized, structured interviews to ensure a fair and equitable process for all candidates.
- Remember to use the preferred pronouns of candidates and the right pronunciation of their names during the interview. Practice beforehand, if necessary.
- Maintain consistent interview and evaluation methods, regardless of whether the candidates are interviewed virtually or in-person, to avoid impacting the hiring decision.
- Establish strong rapport and trust with the candidate through effective communication, empathy, and active listening.
- All interviewers should take detailed objective notes, as it is used to qualify and justify one's evaluation of the candidate. Making decisions based on memory can often lead to biased thinking.
- Note first impressions of candidates, examine for biases, and reassess. 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.

6. Just-in-Time Debriefs Are Conducted

Immediately following interviews, the Hiring Manager and their Panel should debrief and align on interview notes, evaluations, and/or scoring. During the debrief, the Hiring Manager should seek out differing perspectives to validate their own evaluations and/or scoring.

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

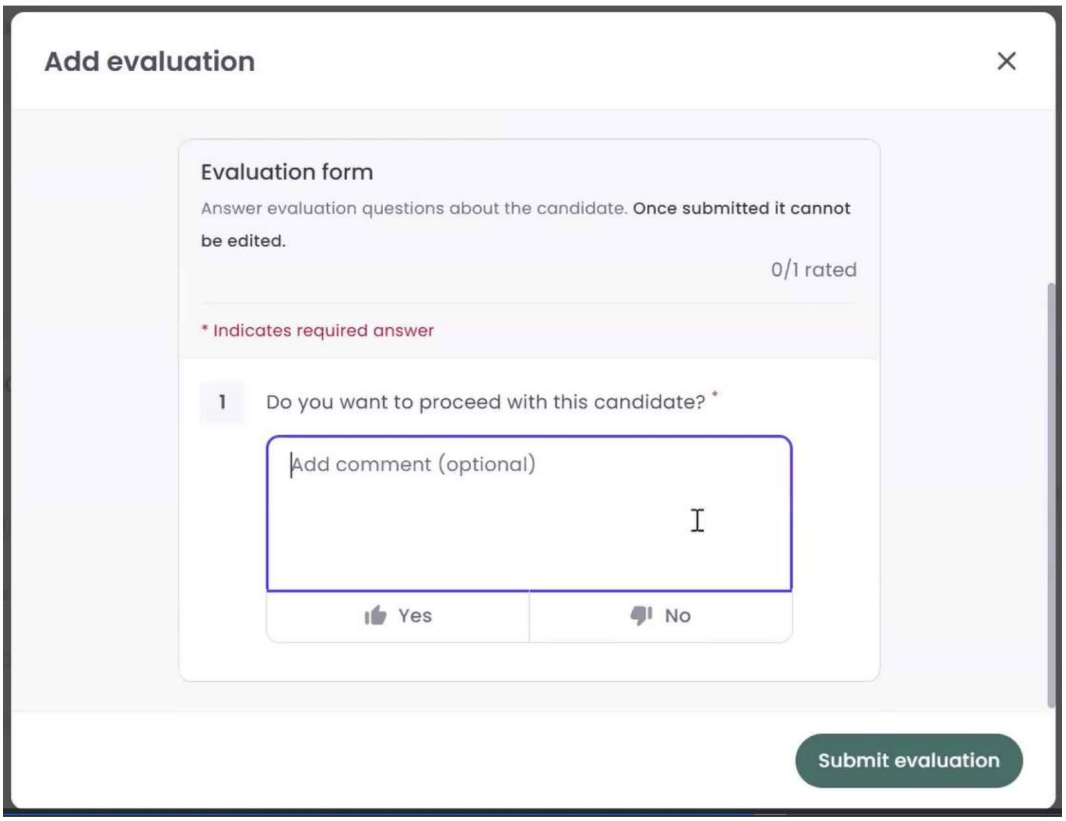
Following that debrief session, the Hiring Manager should collect all completed Interview Templates to refer to when they begin their **candidate evaluations and make a final decision.**

Some Best Practices for Consideration

- If during a debrief, any broad rating discrepancies are discovered, make sure all differing perspectives are considered and discussed thoroughly, and proper notes are taken and then collected. This will be important when the Hiring Manager starts their candidate evaluations and makes their final decision.

7. If Interviews are Complete, the Process Moves Forward

Once an interview has been scheduled or the TA team manually requests an evaluation, you will receive an email with instructions for completing the evaluation form for each candidate.



If after interviews:

- There are prime candidates for consideration, the Hiring Manager should notify the TA Partner about them to ensure they are kept warm and strong connection with them is maintained while the Hiring Manager conducts their evaluations and makes their final decisions.
- There are any candidates that the Hiring Manager does not want to move forward with, they should immediately inform their TA Partner so that they can advise on the actions needed to maintain a positive candidate experience. The Hiring Manager, in turn, should disposition these candidates appropriately in the YTN so that they can be filtered out of the pipeline.
- No viable candidates were brought forward, the Hiring Manager should immediately notify their TA Partner so that they can work together to find another slate of candidates to interview. Additionally, 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.

Some Best Practices for Consideration

- The Hiring Manager should have been dispositioning candidates in the YTN throughout the process. Refer to the **Proper Dispositioning and Communicating to Candidates** for more information on how to appropriately disposition candidates and communicate with them.
- 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

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

Special Considerations for L34/35/Union Roles

- It is important to follow the appropriate protocol for the position. 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.

12. The TA Partner Maintains Connection with Prime Candidates

As the Hiring Manager conducts their candidate evaluations and makes final decisions, the TA Partner will maintain connection with prime candidates. To ensure Yale does not lose these candidates, the TA Partner will maintain open dialogue and keep these candidates abreast of next steps.

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 the **Interview Template**.

Supplemental Learning

For a full listing of learning available:

- Quick Reference Guides
  - How to Schedule and Conduct Effective Interviews (printable version)
  - How to Have a Successful Candidate Slate Review
  - How to Effectively Evaluate Candidates and Make a Final Selection
  - Proper Dispositioning and Communicating to Candidates
- External Resources

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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