**Criteria Development Matrix**

Source: Oregon State University[[1]](#footnote-1)

A criteria matrix can be a useful tool for clarifying search criteria and qualifications that are required or preferred. The following information on developing a criteria matrix is adapted from materials in use at Oregon State University. Thinking through position criteria reduces the impact of unconscious bias and enhances inclusion.

Current research on implicit cognitive and structural bias identifies a need to invest time in the early stages of a hiring process (ideally before the position is posted, but at least before applications are reviewed). The goal is to reach agreement about what is needed to meet each qualification, and how/when we will evaluate candidates on those requirements. Performing this task before advertising the position lets us “test” the qualifications to see if they are likely to produce the intended results, and refine as needed. Being rigorously accountable to the matrix at all remaining stages of the search can help mitigate unintended cognitive bias.

The first time you use the matrix it may seem frustrating or redundant, but faculty, administrators, and staff report that it saves time, prevents confusion, and mitigates bias throughout the selection process. Much of the value results from committee conversations, which capture their diversity of perspectives while ensuring that they understand the qualifications in the same way before evaluating applications.

**Qualifications** – Required qualifications must be met for a candidate to be hired. Preferred qualifications predict better performance on the job. Put only one qualification in each cell.

**Relationship to Job** – To think more broadly about how someone might meet this qualification, we must determine what it prepares the appointee to do in the position. Which position duties require it? Why is it needed, how is it used in the job, and what would be difficult or impossible without it? Is it a proxy for specific performance skills or other critical position skills that are not otherwise articulated? Could these be listed as separate qualifications instead?

**Screening Criteria** – What is the range of different experiences, accomplishments, or learning that will meet this qualification? “What will we do to assess it?” comes later in the process. If you have a degree requirement that includes “other relevant disciplines,” what are those disciplines? Who might we miss if we limit ourselves to interpreting it only this way? Can it be met in other ways we may have overlooked or not considered? How can this be expanded to be more inclusive?

**When to Assess** – At what stage(s) will we have enough information to eliminate candidates for not meeting it? At what other stages will we evaluate it? Thinking through “when to assess” helps reduce the risk of eliminating candidates at the initial screening stage.

**Priority** - How important is this compared to other qualifications in its category (for a required qualification, how important is it compared to other required qualifications; for preferred, how important compared to other preferred)? Will someone who is stronger in this area be a better performer? Even for required qualifications, going beyond just “meeting” the requirements to bring additional strength in one area may be more valuable than bringing additional strength in another area. This column should be completed after all other information has been completed for all qualifications.

**Criteria Matrix Form**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Qualification | Required or Preferred? | Relationship to Job - What aspects of job might they not be able to do/do well without this? | Screening Criteria - What are the different ways someone might meet this qualification? | When to Assess (and eliminate for not meeting) | Priority - Relative importance (circle one) |
|   |   |   |   | Application | Low |
| Zoom/phone interview | Medium |
| Site interview | High |
| References |   |
|   |   |   |   | Application | Low |
| Zoom/phone interview | Medium |
| Site interview | High |
| References |   |
|   |   |   |   | Application | Low |
| Zoom/phone interview | Medium |
| Site interview | High |
| References |   |
|   |   |   |   | Application | Low |
| Zoom/phone interview | Medium |
| Site interview | High |
| References |   |
|   |   |   |   | Application | Low |
| Zoom/phone interview | Medium |
| Site interview | High |
| References |   |

1. Search Advocate Handbook 2019, Oregon State University, p. 90. [↑](#footnote-ref-1)