Reviewing and Evaluating Applicants through Interfolio

A Workshop for UW Search Committees

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Workshop goals…

- Locate Interfolio and UW resources to support search committee work

- Review recruitment 'roles' and connections between them

- Highlight required vs. discretionary uses of the system

- Discuss evaluation criteria, disposition codes, and their relationship to each other

Workshop learning outcomes…

Participants will:

- Know where to find resources available to support search committee work
- Understand how work is distributed in Interfolio by role
- Articulate the purpose of and relationship between evaluation criteria and disposition codes

Resources Available for UW's *Faculty Search*

Order of inquiry for questions about Interfolio...

1. **Check out UW's Interfolio User Guides and FAQ page.** A user guide especially for search committees is available on the [Office of Academic Personnel website](); or use keywords "posting academic jobs" or "evaluator guide" on the main UW site. You can also check out UW's [Interfolio FAQ page]().

2. **Ask your unit's Interfolio Administrator.** Usually a staff member assigned to help coordinate the search; they have greater access to more system features.

3. **Access dozens of short tutorials through Interfolio's website.** [Log in to Interfolio]() by clicking 'Partner Institution'; select Product Help from top-right menu under your name.

4. **If you have a technical question,** contact [help@interfolio.com]() or call (877) 997-8807, 6am–6pm Monday through Friday.

5. **If you have a recruitment procedural or policy question**, email [acadhire@uw.edu]().

6. **If you have a search committee best practice question,** email [slwillyn@uw.edu]().

Unit-Level Interfolio Roles:

Administrator

Administrators can:
- Access all Interfolio positions within the unit
- Assign Administrator, Committee Manager, Evaluator status to others
- Create, edit, submit job postings for approval
- Enter evaluation criteria (rubric) on behalf of search committee
- Run reports on the applicant pool
- Communicate with candidates through Interfolio and submit materials on their behalf
- Use tags to assign files to specific search committee members
- Request reference letters through Interfolio on behalf of search committee
- Assign or change application and position statuses
- Apply disposition codes on behalf of search committee

Administrators cannot or should not:
- Determine evaluation criteria
- Rate candidates
- Make judgement calls on which disposition code applies to a candidate

Unit-Level Interfolio Roles:

Committee Manager

Committee Managers can:
- Only access searches to which they are assigned
- Assign Committee Manager, Evaluator status to others
- Create, edit, submit job postings for approval
- Enter evaluation criteria (rubric) on behalf of search committee
- Run reports on the applicant pool
- Communicate with candidates through Interfolio and submit materials on their behalf
- Use tags to assign files to specific search committee members
- Request reference letters through Interfolio on behalf of search committee
- Assign or change application statuses
- Apply disposition codes on behalf of search committee

Committee Managers cannot or should not:
- View or assign access to other positions in their unit

Unit-Level Interfolio Roles:

Evaluator

Evaluators can:

- Only access searches to which they are assigned
- Review candidate materials
- Rate candidates
- Annotate and/or tag candidate files

Evaluators cannot or should not:

- Open/close the search
- Edit the job posting (position)
- Communicate with candidates and submit materials on their behalf
- Assign or change application or position statuses
- Assign disposition codes
- Run reports on the applicant pool

Intersections of unit-level roles in Interfolio

Ideally, **Administrators set up searches** and, if preferred, assign Committee Managers. **Administrators or Committee Managers manage searches** on behalf of the search committee and the hiring authority.

Evaluators communicate with the Administrators/Committee Managers regarding evaluation criteria, search phases and progress, application of disposition codes, whether/when letters of reference should be solicited, etc.

Interfolio **does not eliminate the need** for frequent, clear communication between the search coordinator (Administrator or Committee Manager) and the search committee (Evaluators).

Required vs. Discretionary Uses of the System

Key required vs. discretionary uses of the system

Institutional Requirements:

- Applicants to UW academic personnel positions must apply through Interfolio

- Evaluation criteria must be entered into Interfolio before applicant review

- Disposition codes must be assigned to each applicant before search is closed and/or preferred candidate hired

- Interfolio is system of record and archive for job posting details, approvals, and applicant materials

Discretionary **(subject to unit/college requirements):**

- Use of Interfolio's 'star' rating system

- Weighting and staging of evaluation criteria

- Use of tags or annotations

- Creation/use of customized applicant questionnaires or forms

- Interpretation of disposition codes

Evaluation Criteria, Disposition Codes, and their Relationship to Each Other

Evaluation Criteria

Definition: Required and desired metrics that assist the evaluators in identifying the best candidate for the position.

Need: Ensures that all applicants are subject to the same evaluation criteria, and that evaluators apply selection criteria consistently.

Application: Evaluators may rate candidates against the criteria using Interfolio's 'star' rating system OR they may rate them outside the system.

Access: The search committee develops the criteria and directs the Administrator or Committee Manager to enter the criteria into the Interfolio system. Those with the Evaluator role do not have access to enter the criteria into the Interfolio system.

Timing: Criteria should be developed and entered into Interfolio *before* the search committee begins review of applications.

What do the criteria look like in Interfolio?

Here is a screen shot of how criteria look when entered into Interfolio.

A reminder that the Administrator or Committee Manager builds and edits this list on behalf of the search committee.

For more information on establishing evaluation criteria, please visit the [UW Evaluator's Guide to Interfolio Faculty Search](#).

What does the rating scale look like in Interfolio?

Here is a screen shot of how criteria look when Evaluators use the rating scale in Interfolio.

Any criteria the Administrator or Committee Manager entered into Interfolio on behalf of the search committee will show up when an Evaluator goes to rate an applicant.

A reminder that use of the star-system rating scale in Interfolio is optional. Units may choose to rate candidates outside the Interfolio system. If units opt to rate outside the system, they will need to retain related records in accordance with UW's record retention policies.

For step-by-step instructions on how to find, open, review, and rate applicant materials, please visit the UW Evaluator's Guide to Interfolio Faculty Search.

Disposition Codes

Definition: High-level descriptor of why an applicant fell out of consideration

Need: As a federal contractor, UW is required to track disposition data in order to maintain compliance with applicable regulations and laws.

Application: Each applicant must be assigned a single code; while more than one code could apply, it is at the search committee's discretion as to which code will be recorded.

Access: Codes cannot be entered by Evaluators, only by Administrators or Committee Managers. Search committee/committee chair must instruct the Administrator/Committee Manager as to which code applies to which applicant.

Timing: Ideally, codes are applied at the conclusion of each broad phase of the search (e.g., after initial review, culling to a shorter list, culling to an interviewee pool, culling to a preferred candidate, etc.).

Search committees/committee chair should plan to update the Administrator or Committee Manager at regular intervals.

Why are disposition codes so important?

- The University is **required** to maintain records on the selection and hiring process.

- Disposition codes help **defend** employment decisions in **audit** or **litigation**. This is especially important since:
  - Committee members associated with the search in question may have terminated or may not be available
  - Interview notes could be lacking or unclear to auditors

- We can look at data of completed searches to evaluate the **effectiveness** of our good faith efforts.

What are the various disposition code options?

- A complete list of disposition codes is located within the [UW Evaluator's Guide to Interfolio Faculty Search](#) which includes link to the [UW Academic Personnel Status/Disposition Matrix](#).

Relationship of evaluation criteria to disposition codes

Evaluation Criteria

- Specific

- Unique to the search

- Developed by the unit/search committee

- Entered into Interfolio by Administrator or Committee Manager

- Subject to interpretation by search committee

- Applied before and informs selection of disposition code

Disposition Codes

- General

- Static list used by all units for all searches

- Developed by the institution

- Entered into Interfolio by Administrator or Committee Manager

- Subject to interpretation by search committee

- Applied after and informed by evaluation criteria

Wrap up

- Search committees perform important work that cannot be *fully* automated

- Interfolio is intended to support search committee work—make it easier to do, to do together, to repeat, and to retain

- Numerous resources available through UW and through Interfolio to assist search committees

- Consistent, well-executed recruitment process will support the hiring of great academic personnel who will contribute in myriad ways to advancing the teaching and research mission of the UW.

Answers to Questions Posed during the 10/15/19 Presentation

Question bank...

Interfolio roles:
- How can someone find out which 'role' they currently have in Interfolio?
- Do we have to have a committee manager? What if there isn't one?
- Why *wouldn't* we assign a Committee Manager?
- Can we assign the Evaluator role to someone outside the UW?

Evaluation criteria:
- Who can see the evaluation criteria?
- If something is listed in the evaluation criteria, will it be read as a requirement?
- Is it possible to include a rubric instead of just a list of criteria in Interfolio?
- How do you weight criteria in Interfolio?

Rating and disposition codes:
- If we want to use a three-point rating system, how do we do that in Interfolio?
- How is a blank rating (no stars) calculated into the overall star rating in Interfolio?
- How do we assign a disposition code in Interfolio?
- Can the disposition code list be edited?
- Does the unit have to change the application status to align with what's shown on the UW Academic Personnel Status/Disposition Matrix?

Miscellaneous:
- Is it possible for a search committee to understand the demographics of the applicant pool?
- Academic HR sometimes sends my draft ad back with a request to revise criteria language in the ad. Why?
- Can I leave comments in Interfolio?
- Where can I make suggestions for improving or enhancing UW's Interfolio *Faculty Search* system?

Q&A

Q: **How can someone find out which 'role' they currently have in Interfolio?**

A: If you don't have a role, you won't be able to access a search in Interfolio. You can ask your Interfolio Administrator to assign, change, or confirm your role.

Q: **Do we have to assign a Committee Manager? What if we don't?**

A: While some units find assigning the Committee Manager role (for instance to the search committee chair) gives them greater flexibility, it is not required. Your Interfolio Administrator can perform the same critical functions that a Committee Manager would (i.e., entering criteria and disposition codes).

Q&A

Q: **Why *wouldn't* we assign a Committee Manager?**

A: Since the Committee Manager has the ability to create and edit a position in Interfolio, they also have the ability to accidentally alter a search in a way that might jeopardize/invalidate the search itself. While the chances of that happening may be small, a search chair might choose to work through the Interfolio Administrator instead of taking on the added risk.

Q: **Can we assign the Evaluator role to someone outside the UW?**

A: Yes, as long as the person has a gmail account. Your Interfolio Administrator can assign the Evaluator role to a non-UW employee and the individual would then log-in using their gmail account. Best practice: If someone outside UW is given the Evaluator role, it should be removed either as soon as their participation is no longer needed or when the search is closed.

Q&A

Q: **Who can see the evaluation criteria?**

A: Anyone with access to the search can see the evaluation criteria—either through their access to build/edit the criteria (Administrator, Committee Manager) or through their ability to rate candidates (Evaluators).

Institutional access roles through the Office of Academic Personnel can also see details and activity of a given search.

Applicants **can never** see the evaluation criteria, ratings, annotations, or tags.

The federal government does not have native access to Interfolio searches.

Q&A

Q: **If something is listed in the evaluation criteria, will it be read as a requirement?**

A: Not necessarily. Criteria should include both required and desired qualifications (i.e., everything stated in the job posting) and the applicant pool under active consideration should be screened against the criteria. Required qualifications are—as the name suggests—deal breakers. You cannot hire an applicant who does not meet the minimum, required qualifications.

However, it is not the case that applicants must meet all the stated desired qualification criteria in order to move forward or become the preferred candidate. The search committee looks at the applicant holistically and makes an informed recommendation as to the applicant's potential for success at UW.

There are some important exceptions to the above if the preferred candidate is a non-U.S. citizen. See this answer for details on that scenario.

Q&A

Q: **Is it possible to include a rubric instead of a list of criteria in Interfolio?**

A: Unfortunately, the platform is not configured to support an actual rubric. While the criteria can be listed in Interfolio, the rubric will have to exist outside Interfolio.

Q: **How do you weight criteria in Interfolio?**

A: Interfolio has a tutorial available for those interested in learning how to weight criteria differently in the system. You can find the tutorial at:

https://product-help.interfolio.com/m/27443/l/657398-how-to-weight-ratings-from-an-applicant-report

Q&A

Q: **If we want to use a three-point rating system, how do we do that within Interfolio's five-star rating system?**

A: You would have to let the Evaluators know to only use three of the five stars available to them.

Q: **How is a blank rating calculated into the overall star rating in Interfolio?**

A: If one/more/all criteria are left blank when rating an applicant, a blank rating (no stars) will not factor into the overall rating calculation; it does not affect the overall rating. In other words, a blank rating is not interpreted as a poor rating; rather, it is interpreted as a no-rating.

Q&A

Q: **How do we assign disposition codes in Interfolio?**

A: Interfolio Administrators or Committee Managers can find information on how to assign disposition codes in the [Managing a Position](#) user guide on the Office of Academic Personnel website.

Q: **Can the disposition code list be edited?**

A: The list of codes is set at the institution level and cannot be changed by units.

Q&A

Q: **The UW Academic Personnel Status/Disposition Matrix notes the different application statuses associated with the lifecycle of a search. It also lists the disposition codes appropriate at each application status phase. Does the unit have to change the application status to align with what's shown on the matrix?**

A: No—but it is a best practice. Ideally, application statuses would be changed at the beginning of each new phase of the search and disposition codes assigned at the end of each phase. Updating application statuses at each phase of the search creates data on not only *why* an applicant fell out of consideration, but also *where* in the search process it occurred. That information may be useful to units in identifying opportunities to write better ads, develop stronger criteria, and screen applicant pools more effectively.

Regardless, units still need to assign a disposition code to every applicant.

Q&A

Q: **Is it possible for a search committee to understand the demographics of the applicant pool?**

A: Administrators and Committee Managers have the ability to run a pre-built demographics report on the entire applicant pool. The report will return de-identified data on all applicants to a search—regardless of qualifications. The unit may choose to share this report with the search committee.

Beginning January 2020, units can request—through the EEOA Compliance Manager—a more detailed look at a closed search (e.g., the demographics of the interviewee pool, etc.). Such a report is intended to support units who want to look across searches and/or over time for potential training opportunities to further support attracting and effectively screening a diverse applicant pool. This expanded report would not be available for active searches.

Q&A

Q: **Academic HR sometimes sends my draft ad back with a request to revise criteria language. Why?**

A: Academic HR (inclusive of the International Scholars Operations team) is looking ahead in your search to make sure that you are positioned well to hire your preferred candidate.

If your preferred candidate is a non-U.S. citizen, the federal government requires them to have met **all** the criteria—**both required and desired qualifications**—in order to be eligible for permanent residence sponsorship.

Having your ad properly worded may help avoid a lot of headache or delay later on when applying for permanent residence. It is a nuanced, complex process which is why UW has a special team tasked with helping units prepare their ads. For more information, visit the Permanent Residency Requirements page on the Office of Academic Personnel website.

Q&A

Q: **Can I leave comments in Interfolio?**

A: Prior to the launch of Interfolio's *Faculty Search* at UW, a decision was made to turn off the comments feature at the institution level. However, Evaluators can still annotate and tag applications.

Q: **Where can I make suggestions for improving or enhancing UW's Interfolio *Faculty Search* system?**

A: The Office of Academic Personnel welcomes your ideas and suggestions for improving and enhancing Interfolio's *Faculty Search* at UW. You can work through your Interfolio Administrator or dean's office, or send your suggestions directly to acadhire@uw.edu.

Thank you for your continued efforts to recruit the best, most diverse and innovative faculty and staff from around the world.

Your hard work is appreciated!