

SMITH ANDERSON

CANDIDATE SCREENING PROCESS (INCLUDES SCREENING MATRIX)

(SAMPLE TEMPLATE)

Kimberly J. Korando
Smith, Anderson, Blount, Dorsett, Mitchell & Jernigan, L.L.P.
Raleigh, North Carolina
919.821.6671
kkorando@smithlaw.com

The screening process and attached matrix are designed to document the process used for reviewing individuals for the ____ positions. No single criteria should cause the individual automatically to be the candidate of choice. As we continue to evaluate and search for the best candidates, this matrix puts on paper a summary of our evaluation and provides one method to evaluate the candidates against each other. Typically, the selection process will start by resume review and completion of the matrix. The candidates then are selected for interview based on the matrix results. The matrix is designed to be a tool in the selection process and does not replace the process. Once the top candidates are evaluated, the selection process moves to the next step. Human Resources should be consulted to ensure all EEO and Company policy hiring practices are being adhered to. The following guidelines should help ensure consistency:

EDUCATION

Each candidate shall be a high school/GED graduate.

Advanced Education

AS/AA shall be valued between (2-6) points. Points should reflect how the degree relates to the job.

Example: AA General Studies (2)
AS Chemistry/Physics (4)
AS _____ (6)
(Degree in specific area)

BS/BA shall be valued between (4-8) points.

Example: BA Political Science (4)

© Copyright 2003 Smith, Anderson, Blount, Dorsett, Mitchell & Jernigan, L.L.P.

SMITH, ANDERSON, BLOUNT, DORSETT, MITCHELL & JERNIGAN, L.L.P.
2500 WACHOVIA CAPITOL CENTER, RALEIGH, NORTH CAROLINA 27601

SMITH ANDERSON

BS Math (6)
BS Chemistry/Physics (6)
BS _____ (8)
(Degree in specific area)

Master degrees shall be valued between (1-6) points, assuming the individual has received points for his/her BA/BS. The Master should be valued as it relates to the _____ industry.

Example: MBA (2)
Master Physics (4)
Master _____ (6)
(Degree in specific area)

College level work shall be valued between (0-5) points. All college level credits should be evaluated based on the course work itself. An individual with over 120 semester hours with concentration in the science field may be given up to 4 points. On the other hand, a few credits in general study may be valued at 0 points.

NOTE: Total education points shall not exceed 10 points.

VOCATIONAL/TECHNICAL

Military training shall be valued between (0-5) points. This training varies in technical skills and length. Each should be evaluated to determine values. Typical programs are as follows:

_____ (5)
_____ (5)
_____ (5)
_____ (5)
_____ (3)
_____ Other

_____ training shall be valued between (2-6) points. Training should be documented and evaluated on content and length:

Example: 6 month training program (6)
8-week training program (3)
Combination of short class (2)

NOTE: Total points vocational/technical training shall not exceed 15 points.

SMITH ANDERSON

Education and vocation/technical points shall not exceed 25 total. This represents 25% of the total points available and will allow for education to be balanced against experience.

WORK/MILITARY EXPERIENCE

_____ Experience
(e.g., *Related Industry*)

The point value shall be based on 1 point for every year, for a maximum of 20 points.

_____ Experience
(e.g., *Onsite*)

The point value shall be based on experience at _____. Point value may be as high as 4.

Areas Worked

The point value is based on 1 point for each area of _____ the individual worked in for at least one year. Total points shall not exceed 5 total.

Non-Related Industry Experience

The point value is based on the individual having worked in an industrial position outside a related industry. Values between 0-3 are based on time in the position. Total points shall not exceed 10 points.

NOTE: Total experience shall not exceed a total of 25 points. This represents 25% of the total points available.

LICENSES/CERTIFICATES/SOCIETIES

Point values are based on how it relates to _____. Total points shall not exceed 5 points. This represents 5% of the total points available.

COMPUTER SKILLS

SMITH ANDERSON

Point values are based on applicability to systems in use at _____ and overall or specialty software applications. NOTE: Total computer skills points shall not exceed 10 points. This represents 10% of the total points available.

COMMUNICATION SKILLS

Point values are based on demonstration of written and/or verbal skill.

NOTE: Total communication skills points shall not exceed 5 points. This represents 5% of the total points available.

NOTE: Subtotal at this time and select candidates for interview based on the results. Point values ordinarily will determine which candidates should be interviewed. As in all cases, however, circumstances may exist that warrant interviewing lower scoring candidates or not interviewing higher scoring candidates. In these circumstances, advance approval from management with HR concurrence must be obtained. The potential of 70 points or 70% of the process has now been evaluated.

INTERVIEW PROCESS

At this point, you may want to review _____.
(interviewing materials)

Candidates brought in to interview should be interviewed by a minimum of _____ Supervisors and/or Managers. The Supervisor/Manager should fill out the interview process sheet as soon as practical after the interview to capture any important factors that may be needed to be discussed later in the process.

The interview is only as good as we make it. The _____ areas are meant to be broad in nature and should give you flexibility in the process. The point value is (0-30) and should only consider the individual's actions/knowledge in the interview itself, not what you know about the candidate's past. No candidate should lose points in the interview because we haven't seen them work.

This section is for the interview process itself. The point value is not to exceed 30 points. This represents 30% of the total points available.

Comments

SMITH ANDERSON

Past observations or knowledge of how well a candidate works, both on the job and with people, are important parts of the process. If you were directly involved with a candidate and can speak of observed action, you may assign or remove points from the candidate's total. Any points added or deducted must be explained in the comment section for review later.

Please remember this matrix/process is only a tool. If we utilize it properly, we should have a documented process of the top candidates. The point values are not so hard and fast that a candidate with a few points above the others is automatically selected. The matrix will allow us to review the strong points of the candidates and select the candidate that fills the business needs of the Company and the group.

Recommendations for final selection together with the matrix and other documentation must be submitted to HR.

