Using Qualitative Methods to Ensure Fair Assessment of Applicants

Melody Snow - MHS (LCCC Pre-Award)

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2023 SYMPOSIUM
FOR RESEARCH ADMINISTRATORS

Session Objectives

- It's time to create a job description and conduct interviews. How do you get the right applicant? How do you create an unbiased "snapshot" of the applications that match your job description?

- This session will help you understand how to create effective job descriptions using accurate skill sets, and then show you how to turn those skills into a scoring module to help you fairly assess your applications and interviews. No bias, just data!

  - Learn to create an accurate job description capturing appropriate skill sets.
  - Discover how to convert those skills into unbiased interview questions.
  - Understand how to create a scoring matrix from those questions.

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What are skill sets?

What are skill sets? (UNC HR)

- KNOWLEDGE: PROGRAM AND ORGANIZATION

- PROGRAM ADMINISTRATION

- CUSTOMER SERVICE

- COMMUNICATION: VERBAL/WRITTEN

- INFORMATION/RECORDS ADMINISTRATION

- LEADERSHIP

* Specific to UNC HR: Competencies required for the position

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KNOWLEDGE: PROGRAM AND ORGANIZATION

- Knowledge of program procedures and methods and knowledge of the related business context, appropriate for the level of work.

- Knowledge of contemporary applicable technology (hardware, software, equipment and processes).

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PROGRAM ADMINISTRATION

- Ability to provide oversight for an on-going program.

- Ability to establish expectations and clear directions including the tasks and activities to accomplish the intended outcome and timeline.

- Ability to monitor delegated assignments or projects for results.

COMMUNICATION: VERBAL/WRITTEN

- Ability to convey information clearly, verbally and in writing, with and to individuals or groups to ensure information is shared and that messages are understood.

- Ability to demonstrate effective use of listening skills and displays openness to other people's ideas and thoughts.

- Ability to gain credibility by fostering respect for all individuals and points of view.

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CUSTOMER SERVICE

- Ability to develop and maintain productive collaborative work relationships with all clients (internal and external who utilize services) by listening to the client, understanding and responding to apparent and underlying needs, and continually seeking to provide the highest quality service to all.

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INFORMATION/RECORDS ADMINISTRATION

- Ability to compile, assimilate, organize, store and retrieve electronic and printed information.

- Ability to access, review, compile and analyze multiple sources of data and information to generate appropriate criteria for reports and presentations.

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LEADERSHIP

- Ability to establish expectations and clear direction to meet goals and objectives of on-going work for a group of employees.

- Ability to motivate and engage employees through effective communication.

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What are skill sets? (GENERAL)

ATTENTION TO DETAIL	CRITICAL THINKING	CUSTOMER SERVICE	EFFECTIVE COMMUNICATION	RESEARCH SKILLS
SELF-MOTIVATION	TEAM PLAYER	TIME MANAGEMENT	WRITTEN COMMUNICATION	DATA MANAGEMENT
	BASIC MATH SKILLS	BASIC TECHNOLOGY SKILLS		

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What are skill sets? (GENERAL)

ATTENTION TO DETAIL

Thoroughness and efficiency in accomplishing a task through concern for all the areas involved, no matter how small. Monitors and checks work or information and plans and organizes time and resources efficiently.

CRITICAL THINKING

A thought process that allows a person to evaluate and assess information objectively and calculate responses and judgment, using observation, analysis, inference, communication, and problem solving.

CUSTOMER SERVICE

★★★ The support offered to customers — both before and after they use the administrator's services — that helps them have an easy and enjoyable experience. This includes accountability for the administrator's actions throughout the interaction.

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What are skill sets? (GENERAL)

EFFECTIVE COMMUNICATION

The process of exchanging ideas, thoughts, opinions, knowledge, and data so that the message is received and understood with clarity and purpose.

RESEARCH SKILLS

The ability to find an answer to a question or a solution to a problem by gathering information about a topic, reviewing that information, and analyzing and interpreting the details in a way to support a solution.

SELF-MOTIVATION

Initiative to undertake or continue a task or activity without another's prodding or supervision.

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What are skill sets? (GENERAL)

TEAM PLAYER

Someone who puts aside their personal goals for the necessary time and works well with others, doing what they need to do to strive for a common goal.

TIME MANAGEMENT

The coordination of tasks and activities to maximize the efficiency and effectiveness of an individual's efforts

WRITTEN COMMUNICATION

Connection, clarity, explains reason for communication, concise, correct tone, and correct grammar

What are skill sets? (GENERAL)

DATA MANAGEMENT

Ability to manipulate data for use and reports

BASIC MATH SKILLS

Use of tools to complete basic math concepts (addition, subtraction, multiplication, division)

BASIC TECHNOLOGY SKILLS

Use of Microsoft WORD, EXCEL, OUTLOOK, and learn other programs

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Let's compare

KNOWLEDGE: PROGRAM AND ORGANIZATION

Knowledge of program procedures and methods and knowledge of the related business context, appropriate for the level of work. Knowledge of contemporary applicable technology (hardware, software, equipment and processes).

BASIC TECHNOLOGY SKILLS	DATA MANAGEMENT	ATTENTION TO DETAIL	RESEARCH SKILLS

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Let's compare

PROGRAM ADMINISTRATION

Ability to provide oversight for an on-going program. Ability to establish expectations and clear directions including the tasks and activities to accomplish the intended outcome and timeline. Ability to monitor delegated assignments or projects for results.

| ATTENTION TO DETAIL | CRITICAL THINKING | TIME MANAGEMENT |

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Let's compare

CUSTOMER SERVICE

Ability to develop and maintain productive collaborative work relationships with all clients (internal and external who utilize services) by listening to the client, understanding and responding to apparent and underlying needs and continually seeking to provide the highest quality service to all.

CUSTOMER SERVICE	EFFECTIVE COMMUNICATION	TEAM PLAYER

Let's compare

COMMUNICATION: VERBAL/WRITTEN

Ability to convey information clearly, verbally and in writing, with and to individuals or groups to ensure information is shared and that messages are understood. Ability to demonstrate effective use of listening skills and displays openness to other people's ideas and thoughts. Ability to gain credibility by fostering respect for all individuals and points of view.

| CUSTOMER SERVICE | EFFECTIVE COMMUNICATION | WRITTEN COMMUNICATION |

Let's compare

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| EFFECTIVE COMMUNICATION | CUSTOMER SERVICE | WRITTEN COMMUNICATION | CRITICAL THINKING |

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Let's compare

INFORMATION/RECORDS ADMINISTRATION

Ability to compile, assimilate, organize, store and retrieve electronic and printed information. Ability to access, review, compile and analyze multiple sources of data and information to generate appropriate criteria for reports and presentations.

WRITTEN COMMUNICATION	DATA MANAGEMENT	BASIC TECHNOLOGY	BASIC MATH SKILLS	CRITICAL THINKING	ATTENTION TO DETAIL

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Let's compare

LEADERSHIP

Ability to establish expectations and clear direction to meet goals and objectives of on-going work for a group of employees. Ability to motivate and engage employees through effective communication.

| EFFECTIVE COMMUNICATION | TEAM PLAYER | CRITICAL THINKING | CUSTOMER SERVICE |

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Pre-Award Specialist

UNC Job Description

Duties/RESPONSIBILITIES

Grants and contracts administration – pre-award (70%)

- During the Pre-Award grant phase, the position will ensure that agency or foundation rules are being followed in the preparation of contract(s) and grant(s).

- A keen understanding of University, State and departmental business rules and practices, cost sharing, effort reporting, and the awarding agency's guidelines is critical.

- The ability to interpret and implement NIH, NSF, DOD and a variety of other agencies and foundations' grant submission requirements is necessary.

- This position will troubleshoot any issues with a grant filing and determine needed modifications.

- This position will work independently with PIs to coordinate the process of research proposal submissions and other grant and contract related matters in the Pre-Award phase of development.

- When needed, the position will serve as a backup for other Pre-Award Specialists on the team.

- This position will adhere to university and department policy around Pre-Award timeline(s).

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Let's play skill set match up!

GRANTS AND CONTRACTS ADMINISTRATION: PREAWARD SPECIALIST

During the Pre-Award grant phase, the position will ensure that agency or foundation rules are being followed in the preparation of contract(s) and grant(s). A keen understanding of University, State and departmental business rules and practices, cost sharing, effort reporting, and the awarding agency's guidelines is critical. The ability to interpret and implement NIH, NSF, DOD and a variety of other agencies and foundations grant submission requirements is necessary. This position will troubleshoot any issues with a grant filing and determine needed modifications. This position will work independently with PIs to coordinate the process of research proposal submissions and other grant and contract related matters in the Pre-Award phase of development. When needed, the position will serve as a backup for other Pre-Award Specialists on the team. This position will adhere to university and department policy around Pre-Award timeline(s).

- **ATTENTION TO DETAIL**
- **CRITICAL THINKING**
- **CUSTOMER SERVICE**
- **EFFECTIVE COMMUNICATION**
- **RESEARCH SKILLS**
- **SELF-MOTIVATION**
- **TEAM PLAYER**
- **TIME MANAGEMENT**
- **WRITTEN COMMUNICATION**
- **DATA MANAGEMENT**
- **BASIC MATH SKILLS**
- **BASIC TECHNOLOGY SKILLS**

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Submission of JIT requests and progress reports (20%)

- This position submits annual progress reports and JIT requests.

- They are responsible for tracking upcoming deadlines and communicating those deadlines to PIs and accounting staff.

- They will also gather all needed information from PIs to submit progress report on time.

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Let's play skill set match up!

<u>SUBMISSION OF JIT REQUESTS & PROGRESS REPORTS</u>

This position submits annual progress reports and JIT

requests. They are responsible for tracking upcoming

deadlines and communicating those deadlines to PIs

and accounting staff. They will also gather all needed

information from PIs to submit progress report on time

- ATTENTION TO DETAIL
- CRITICAL THINKING
- CUSTOMER SERVICE
- EFFECTIVE COMMUNICATION
- RESEARCH SKILLS
- SELF-MOTIVATION
- TEAM PLAYER
- TIME MANAGEMENT
- WRITTEN COMMUNICATION
- DATA MANAGEMENT
- BASIC MATH SKILLS
- BASIC TECHNOLOGY SKILLS

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Updating other support and biosketches (10%)

- This position will work with the PI and the accounting group to update Other Support as requested for grant submissions.

- They format the Other Support and work with accounting to verify effort levels on sponsored funds.

- This position will also be expected to review biosketches to ensure correct format and consistency in the grant submissions.

Let's play skill set match up!

UPDATING OTHER SUPPORT AND BIOSKETCHES

This position will work with the PI and the accounting group to update Other Support as requested for grant submissions. They format the Other Support and work with accounting to verify effort levels on sponsored funds. This position will also be expected to review biosketches to ensure correct format and consistency in the grant submissions.

- **ATTENTION TO DETAIL**
- **CRITICAL THINKING**
- **CUSTOMER SERVICE**
- **EFFECTIVE COMMUNICATION**
- **RESEARCH SKILLS**
- **SELF-MOTIVATION**
- **TEAM PLAYER**
- **TIME MANAGEMENT**
- **WRITTEN COMMUNICATION**
- **DATA MANAGEMENT**
- **BASIC MATH SKILLS**
- **BASIC TECHNOLOGY SKILLS**

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WHAT DO I ASK IN THE INTERVIEW?

GET THE MOST BANG FOR YOUR BUCK

- USE GENERAL REAL-WORLD SITUATIONS

- CAPTURE AT LEAST TWO SKILL SETS PER QUESTION

- INCLUDE A WRITTEN QUESTION

- DON'T FORGET TO ADD SOME MATH IN THE QUESTIONS

- YOU ONLY NEED TO ASK A FEW QUESTIONS

- YOU CAN'T ASK THAT

- THAT IS A BIASED QUESTION

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Interview question #1

You are responsible for setting your own work priorities. On Monday you must complete the tasks below by 5pm Friday. How would you prioritize and complete them?

1. Three (3) emails requesting project status updates which must be answered within forty-eight (48) hours.

2. One (1) email requesting a budget which takes about two (2) hours to complete and requires research from internal computer programs.

3. Two (2) applications, each requiring three (3) days to complete. Some of the application information can be done by you with research from internal systems and some of the application relies on documents provided to you as they are completed by the researcher.

4. Review of the two (2) grant application proposals requires attention to detail and takes as much time as you need to successfully understand the requirements for the grant.

5. Data analysis report for your supervisor that is due at 1pm on Wednesday. This requires the use of internal systems and takes as much time as you need to a) successfully collect and clean the data, b) put it in a report form and c) provide a written analysis of the results.

6. Review and file miscellaneous emails that came in over the weekend that are information only and do not require responses. You get about ten (10) of these each day, so be sure to account for that in your plan throughout the week.

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Question 1 Skill Sets

Which skill sets fall under Question 1?

- **ATTENTION TO DETAIL**
- **CRITICAL THINKING**
- **CUSTOMER SERVICE**
- **EFFECTIVE COMMUNICATION**
- **SELF-MOTIVATION**

- **TIME MANAGEMENT**
- WRITTEN COMMUNICATION
- DATA MANAGEMENT
- BASIC MATH SKILLS
- BASIC TECHNOLOGY SKILLS

Interview question #2

Its Friday, your supervisor has left for the day.

One of your teammates has an application due at 5pm, so do you.

Your application is 95% complete, your teammate's application is 90% complete, he still needs additional documents from the researcher to add to the application.

You are waiting for reviewer comments but have completed everything you can until those comments return.

It is 1pm and your teammate gets sick and must go home for the day.

He asks you and two other teammates for help completing his application.

What do you do?

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Question 2 Skill Sets

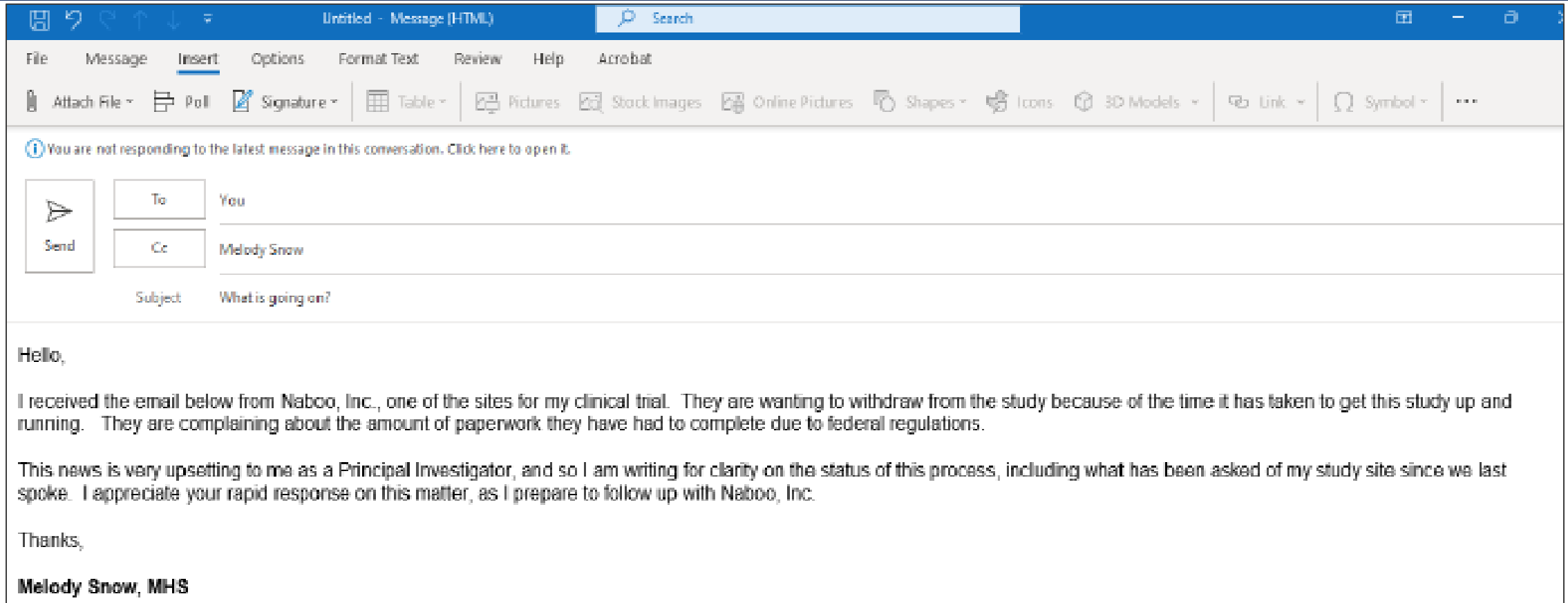Which skill sets fall under Question 2?

- ATTENTION TO DETAIL
- **CRITICAL THINKING**
- **CUSTOMER SERVICE**
- EFFECTIVE COMMUNICATION
- RESEARCH SKILLS
- SELF-MOTIVATION

- **TEAM PLAYER**
- **TIME MANGEMENT**
- WRITTEN COMMUNICATION
- DATA MANAGEMENT

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Interview question #3

Use Microsoft WORD to create a response to this email from one of your assigned researchers. What you need to know:

- There are 10 forms they must complete to get started on the clinical trial.

- All these documents are either required by your university or by the federal government for clinical trials.

- You do not create the agreement.

- You sent the request for Naboo, Inc., to complete the documents and then you will pass the documents on to another team who creates the agreement.

- It took 2 months to get the paperwork from Naboo, Inc., because they had to get U.S. government licenses to complete clinical trials.

- You passed the paperwork on to the next team a month ago and are no longer part of the process.

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Interview question #3

Untitled - Message (HTML)

File   Message   Insert   Options   Format Text   Review   Help   Acrobat

Attach File ▾   Poll   Signature ▾   Table ▾   Pictures   Stock Images   Online Pictures   Shapes ▾   Icons   3D Models ▾   Link ▾   Symbol ▾   ...

ⓘ You are not responding to the latest message in this conversation. Click here to open it.

To   You

Cc   Melody Snow

Send

Subject   What is going on?

Hello,

I received the email below from Naboo, Inc., one of the sites for my clinical trial. They are wanting to withdraw from the study because of the time it has taken to get this study up and running.   They are complaining about the amount of paperwork they have had to complete due to federal regulations.

This news is very upsetting to me as a Principal Investigator, and so I am writing for clarity on the status of this process, including what has been asked of my study site since we last spoke. I appreciate your rapid response on this matter, as I prepare to follow up with Naboo, Inc.

Thanks,

Melody Snow, MHS

Question 3 Skill Sets

Which skill sets fall under Question 3?

- ATTENTION TO DETAIL
- CRITICAL THINKING
- **CUSTOMER SERVICE**
- EFFECTIVE COMMUNICATION
- RESEARCH SKILLS
- SELF-MOTIVATION
- TEAM PLAYER
- TIME MANAGEMENT
- **WRITTEN COMMUNICATION**
- BASIC TECHNOLOGY SKILLS

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Interview question #4

Use your calculator:

Add 28.7% to $935,521.79.

What is the total?

Explain how you got your answer.

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Question 4 Skill Sets

Which skill sets fall under Question 4?

- ATTENTION TO DETAIL
- CRITICAL THINKING
- CUSTOMER SERVICE
- EFFECTIVE COMMUNICATION
- RESEARCH SKILLS
- SELF-MOTIVATION

- TIME MANAGEMENT
- WRITTEN COMMUNICATION
- **BASIC MATH SKILLS**
- **BASIC TECHNOLOGY SKILLS**

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Interview question #5

1. Go to: https://www.census.gov/library/visualizations/interactive.2021.List_622140349.html

2. Find and use the map to compare the self-response rate for the 2020 census in NC to each of the original thirteen (13) colonies.

3. Then compare the self-response rate for the 2020 census in NC to the average response rate for the thirteen (13) colonies together.

4. Create a table with the data.

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Question 5 Skill Sets

Which skill sets fall under Question 5?

- **ATTENTION TO DETAIL**
- **CRITICAL THINKING**
- EFFECTIVE COMMUNICATION
- **RESEARCH SKILLS**
- TEAM PLAYER
- TIME MANAGEMENT

- WRITTEN COMMUNICATION
- **DATA MANAGEMENT**
- **BASIC MATH SKILLS**
- **BASIC TECHNOLOGY SKILLS**

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General question example

This position requires working with a wide variety of personalities to reach a common goal. Can you tell me about a time you worked with a difficult client/customer? What occurred and how did you handle the situation?

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What is the score: 1-5 simple scale

1. **Does not meet expectations:** Does not answer question at all

2. **Meets some expectations:** Answers are vague but do relate to the question

3. **Meets most expectations:** Answers the question well but not completely

4. **Meets all expectations:** Adequately responds to the question and answers it completely

5. **Exceeds all expectations:** Answer is thorough, thought out, and explanations are detailed. May even go beyond the general answer and provide an "out of the box" thought or detail.

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INTERVIEW QUESTION #1: SKILLS AND EXPECTED RESPONSES FOR A SCORE OF 4 (Question Total = 24-30)

ATTENTION TO DETAIL

Takes time limits into account;
Detailed explanation of process

CRITICAL THINKING

Carefully thought-out order; Takes notes;
Shows process

CUSTOMER SERVICE

Addresses #1 and #5 in timely order;
Refers to customer needs in answer

EFFECTIVE COMMUNICATION

Able to articulate thought process on prioritization

SELF MOTIVATION

Able to complete the tasks without asking
For help or delegating to someone else

TIME MANAGEMENT

Answer addresses all tasks;
Ensures adequate time to complete and meet deadlines

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INTERVIEW QUESTION #2: SKILLS AND EXPECTED RESPONSES FOR A SCORE OF 4 (Question Total = 16-20)

CRITICAL THINKING

CONSIDERS PLAN FOR COMPLETING BOTH PROJECTS

CUSTOMER SERVICE
MENTIONS REACHING OUT TO OTHER RESEARCH OR REVIEWER FOR STATUS UPDATES

TEAM PLAYER

OFFERS TO HELP

TIME MANAGEMENT

PLAN INCLUDES HOW THEY WILL MANAGE BOTH APPLICATIONS AND MEET THE DEADLINES

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INTERVIEW QUESTION #3: SKILLS AND EXPECTED RESPONSES FOR A SCORE OF 4 (Question Total = 12-15)

CUSTOMER SERVICE

RESPONSE IS PROFESSIONAL AND ADDRESSES THE ISSUE; DISCUSSES HOW TO FIX WHAT CAN BE FIXED

WRITTEN COMMUNICATION

GOOD GRAMMAR AND SPELLING; APPROPRIATE PROFESSIONAL TONE; PROPER EMAIL STRUCTURE

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BASIC MATH SKILLS

ABLE TO PROVIDE CORRECT ANSWER

CRITICAL THINKING

ABLE TO EXPLAIN ANSWER

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INTERVIEW QUESTION #5: SKILLS AND EXPECTED RESPONSES FOR A SCORE OF 4 (Question Total = 24-30)

ATTENTION TO DETAIL

Data selection is accurate

CRITICAL THINKING

Works through the question methodically

DATA MANAGEMENT

**Able to manipulate the internet data;
Uses only what is required to complete the answer**

BASIC MATH SKILLS

Able to calculate averages

BASIC TECHNOLOGY SKILLS

Able to access the internet link and manipulate excel

RESEARCH SKILLS

Finds and manipulates correct map on the web page

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THIS PROCESS IN ACTION: LCCC PRE-AWARD SPECIALIST

APPLICATION PHASE

- Review for mention or demonstration of 12 skill sets

- Yes/no

- Set your minimum total standard

First	Last				
A	B				

SKILL SETS RELATED TO POSITION					
Skill	Described in Application?	Notes (application)	Described in Interview?	Notes (interview)	
Research Skills	YES				
Critical Thinking	YES				
Time Management	YES				
Attention to Detail	NO				
Team Player	NO				
Self-Motivation	YES				
Effective Communication	NO				
Written communication	YES				
Customer Service	YES				
Data Management	NO				
Basic Math Skills	YES				
Basic Technology Skills	YES				
Total	8		0		

Last Name	First Name	Total Skills Application	Selected for Interview?	
B	A	8	yes	
D	C	12	yes	
F	E	5	no	
Total			2	
		Cuttoff points	7	

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THIS PROCESS IN ACTION: LCCC PRE-AWARD SPECIALIST

AFTER APPLICATION REVIEW

- Determine who met the minimum standards

- Send written assignment

- Returned before interview
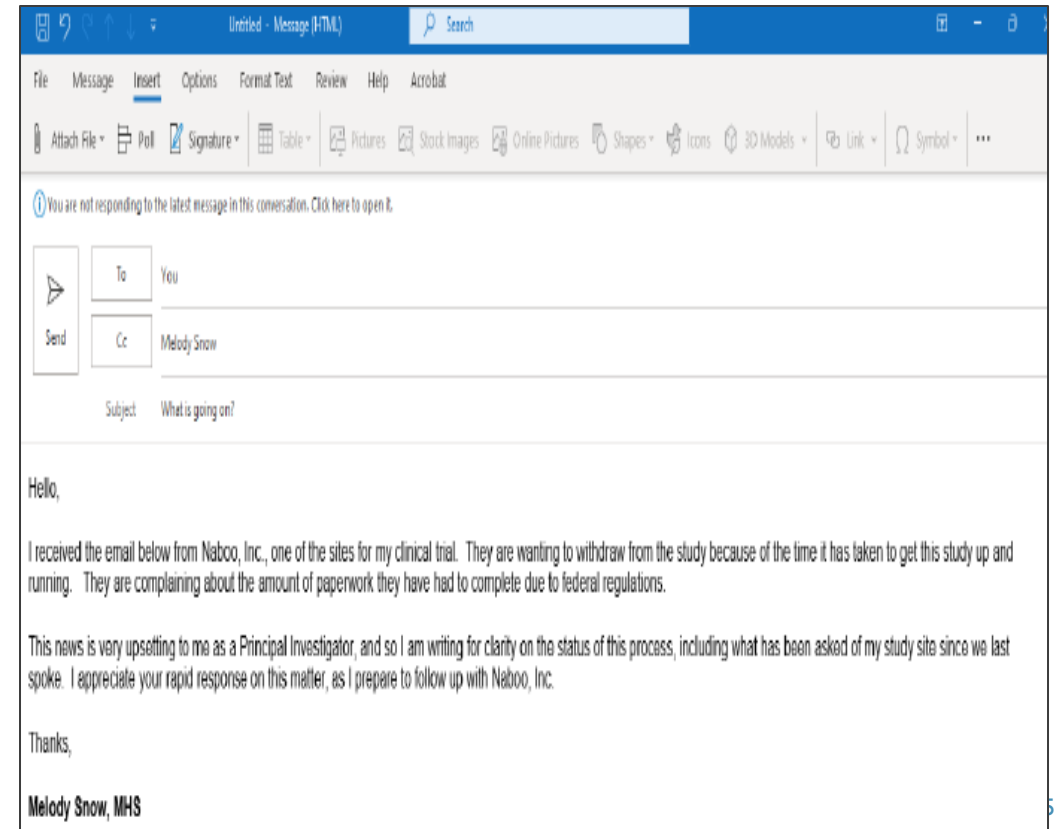
HOW DID THEY DO?

How did they do?

- Five questions scored up to five points: Max score of (84-105)

- What is your total for an acceptable candidate?

- Decide who has those scores

- Narrow it down

- What if there are several good scores?

- Make an offer, check references

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THIS PROCESS IN ACTION: LCCC PRE-AWARD SPECIALIST

Last Name	First Name	Total Skills Application	Selected for Interview?	notes	Interview total	Make Offer
B	A	8	yes		86	yes
D	C	12	yes	already in research field	60	no
F	E	5	no	little work experience	0	no
Total			2			1

| | | Cuttoff points 7 | | | Cutoff points 75 | |

AFTER INTERVIEW

- Determine who met the minimum standards

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QUESTIONS?

THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL