Holistic Principles in Grantee Selection: An Introduction

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Presentation Outline
1. Provide an overview of the Holistic Review Framework

2. Introduce elements of the selection process that you can control and those you can influence

3. Share promising practices within Holistic Review

4. Engage in Q&A
Overview of Holistic Review
Originally designed for medical schools
Screening  Interviewing  Selecting
AAMC Holistic Review in Admissions Framework™

- Emphasizes the importance of giving individualized consideration
- Provides operational guidance
- Encourages using a balanced approach
DEFINITION

Holistic review is a flexible, individualized way of assessing an applicant’s capabilities, by which balanced consideration is given to experiences, attributes, competencies, and academic or scholarly metrics (EACM) and, when considered in combination, how the individual might contribute value to the institution’s mission.
CORE PRINCIPLE 1

In a holistic recruitment and selection process, selection criteria are:

- Broad-based
- Linked to institutional mission and goals
- Promote diversity and inclusion as essential to excellence
CORE PRINCIPLE 2

A balance of experiences, attributes, competencies, and metrics (EACM) are:

- Used to assess applicants with the intent of creating a *richly diverse interview and selection pool*

- **Applied equability** across the entire candidate pool

- **Supported by performance data** that show certain Es, As, Cs, and Ms are linked to a likelihood of success as a resident
CORE PRINCIPLE 3

Screeners and reviewers:

*Give individualized consideration* to how each applicant may contribute to the institution or program’s learning environment and *practice of medicine*

*Weigh and balance* the range of criteria needed to achieve the outcomes desired by the program or institution.
EACM Criteria Identification Tool

Experiences

Attributes

Competencies

Metrics

Excellence
Experiences - Encompasses the path an applicant has taken to get to where s/he is.

The outer ring acknowledges the influence of the world context in which these experiences took place.
Attributes

Includes the applicant’s current skills and abilities, personal qualities, and relevant demographic factors.
Competencies

Include the way in which an applicant applies their skills including how they think, achieve results, interact with people, and self-manage.
Metrics - Includes the quantitative scholarly academic components of the applicant’s portfolio.
Holistic Review

1. Mission-driven
2. Strategically focused
3. Acknowledges diversity as essential to institutional excellence
4. Informed by local data
Institutional Mission, Goals & Diversity Interests

Selection Criteria

Screening ➔ Interviewing ➔ Selecting
Misconceptions

A holistic selection process:

- Is not “making up for previous injustices”
- Is not a quota system
- Does not lower standards, it expands them
- Does not ignore academic metrics; rather, considers metrics in the context of an applicant’s entire portfolio
**Goal:** To engage you in thinking about how you might strategically apply the AAMC’s Holistic Review Framework to:

- **Widen the lens** through which we assess applicants in support of your mission and
- **Further leverage the benefits of diversity and inclusion**
Resource

**Applicant Criteria Identification and Prioritization**

**Purpose:** A critical part of a holistic selection process is identifying Experiences, Attributes, Competencies, and Metrics (EACMs) that are grounded in your mission and promote diversity and inclusion. Developing a shared understanding of how these criteria are prioritized facilitates recruitment, helps orient reviewers and interviewers, and informs the development of evaluation rubrics.

This activity will help you to “widen the lens” through which you assess residents by identifying and ranking the mission-driven EACMs that would add value to your program.

**Directions:** For each applicant criterion:

**Part 1**
1. Determine if each example in the following charts should be included, edited, or eliminated from your resident selection process.
2. Add any criteria that would be important to the accomplishment of your institution’s mission and program goals.

**Part 2**
3. Rank how the EACMs contribute to your decision to invite a resident for an interview.

**Experiences**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Importance of criteria to interview invitation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not important</td>
</tr>
<tr>
<td>Educational background</td>
<td></td>
</tr>
<tr>
<td>Community service/volunteer experience</td>
<td></td>
</tr>
<tr>
<td>Leadership roles</td>
<td></td>
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<tr>
<td>Experience with diverse populations</td>
<td></td>
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<tr>
<td>Research experience</td>
<td></td>
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</tbody>
</table>
Applying Holistic Review to Resident Selection

Purpose: Developing shared definitions of the criteria you identified in Activity 1 helps orient reviewers and interviewers and informs the development of evaluation rubrics; it can also help mitigate the influence of unconscious bias. This activity will help you to define your high-priority criteria and assess if your recruitment materials and selection processes reflect your priorities.

Directions:
1. Review your rankings from Activity 1 and select two “very important” criteria for each of the four domains in the EACM model. Clearly define each of those criteria.
2. Look at your current recruitment materials and selection filters to determine if these will reveal the priority criteria that you have identified.
3. Determine what you could add or change to assist you in finding the EACMs you are looking for.

Part 1: Resident Selection Criteria

<table>
<thead>
<tr>
<th>EXPERIENCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criterion:</td>
</tr>
<tr>
<td>Definition:  How do you define it?</td>
</tr>
<tr>
<td>Assess:      What evidence will satisfy this requirement? Do my current recruitment and selection materials allow me to assess this criterion? What, if any, changes are needed?</td>
</tr>
</tbody>
</table>
Control, Influence, Concern Model
What Do You Control?

Concern

Influence

Control
What Do You Control?

How your recruitment materials are written

Including a diversity statement in your call

Where you post your call

Application materials that reflect what you’ve determined is important and mission aligned
What Do You Control?

- Your application criteria and requirements
- The tools you use to assess applicants
- How you weigh your requirements
What Do You Influence?
What Do You Influence?

- Who applies to your program
- How your program is perceived
- How visiting applicants experience your program
- How current grantees describe their experience
Promising Practices in Holistic Review
Promising Practices for Conducting Holistic Review: \textit{Preparation}

- Ground your screening, interview, and acceptance criteria in institutional mission and educational and diversity goals.

- Develop a shared understanding of how your school prioritizes these criteria.

- Develop shared definitions for these criteria.
Promising Practices for Conducting Holistic Review: *Screening*

- Understand the context of the applicant. Consider reading the personal statement and/or experiences first.

- Use a screening rubric for experiences, attributes, competencies, and academic metrics.

- If using academic metrics thresholds, set them based on institutional data and support services.

- After determining applicants have met academic metrics criteria, consider removing academic metrics from the rest of the process.
Promising Practices for Conducting Holistic Review: *Interviews*

- Train admissions committee members and interviewers on admissions policies, processes, practices, and unconscious bias.
- Use a semi- or highly structured interview process.
- Use an evaluation rubric.
Promising Practices for Conducting Holistic Review: Administrative

- Regularly evaluate your selection process to assess the effectiveness, value, and necessity of policies and criteria.

- Clearly communicate mission, goals, and criteria to applicants and advisors, as well as to your institution’s faculty, staff, and administrators.

- Cultivate support and buy-in from institutional leadership.
Promising Practices for Conducting Holistic Review: *Reducing Implicit Bias*

- **Common identity formation:** Ask interview questions about interests and activities you share in common.
- **Perspective taking:** Take the perspective of a member of a group against which you have unconscious bias.
- **Consider the opposite:** When data seem to point to one conclusion, briefly look for data supporting the opposite conclusion before making a final decision.
- **Counter-stereotypical exemplars:** Spend time with or focus on individuals you admire from groups against which you have a bias.

*Source: AMCAS Bias in Admissions Webinar, June 10, 2021, Quinn Capers IV, MD, FACC*
Promising Practices for Conducting Holistic Review: *Reducing Structural Bias*

- Frame the discussion around Bias
- Define elements of bias
- Conduct an Equity Impact Assessment

*Source: AMCAS Bias in Admissions Webinar, June 10, 2021, Sunny Nakae, MSW, PhD.*
Framing the discussion on bias

BIAS

Structural [systemic]  Interpersonal [individual]
# Defining elements of bias

## Structural (system level decisions)
- GPA calculation, sorting, cutoffs, and prioritization
- MCAT use and policy
- Required premed courses
- Policies related to FAP, disadvantaged status, letters, resident status
- Deadlines

## Interpersonal (person-based decisions)
- Attitudes (racism, elitism, sexism, homophobia, etc.)
- Stereotypes, anchor bias, overconfidence, etc.
- Time crunch
- Coded language, tradition, name bias, appearance bias
Equity Impact Assessment:

*Undergraduate GPA*

- To what competencies or evidence-based predictors does this correspond?
- How reliable is the evidence?
- What school-specific data or applications do we have?
- Who benefits from this?
- Who is hindered by this?
- How can we improve the mission-congruence of this element?
- What is not visible with this tool that may be relevant?
- How can we approach this more equitably?
Additional Information About Holistic Review


• Harrison, L. E. Using holistic review to form a diverse interview pool for selection to medical school. *Baylor University Medical Center Proceedings*, 32:2, 218-221. 10.1080/08998280.2019.1576575


Contact us

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