

## Introduction

These guidelines provide a framework for engaging and monitoring the performance of recruitment search firms for any positions deemed to require recruitment services beyond those provided by Workforce Planning in Human Resources at SJSU.

## Overview

A department considering the use of a search firm or employment agency must **consult with Human Resources and Purchasing first**. Search firm services are not exempt from the competitive bid process, but the CSU maintains a list of those with valid Master Enabling Agreements (MEAs) that can be used without further bidding. Any search conducted by an outside agency or search firm must meet the same federal, state, local, and University guidelines as searches conducted directly through HR.

The search firm works on behalf of the University and is responsible for the same applicant tracking HR would otherwise do, including keeping records of Affirmative Action outreach efforts, and the recruitment and selection process. The division/college/department/unit that contracts with a firm or agency is responsible for ensuring that the selected firm or agency is fully informed regarding its responsibilities for meeting the University's (AA/EEO) search documentation responsibilities. HR can assist you in this process. To ensure consistency in searches, the contract with the search firm should include advertising, in addition to the identification and screening of applicants. All background checks will be the responsibility of Human Resources, and should never be included in any search firm contract.

The search firm must submit a copy of all search records to the hiring department before the University processes payment of the final invoice or expense reimbursement. The hiring department is responsible for forwarding the invoice for payment and should follow defined processes to ensure final payment..

## Engaging a Search Firm

When the need for engaging an outside search firm arises, follow the steps below:

### 1) Hiring Department Responsibilities

- a) Submit Vice President/President approval by email to the Workforce Planning Analyst for your department
- b) After preliminary meeting with HR and Purchasing (see item 3.a below), enter Requisition in FTS to begin the procurement process
  - i) Include name of firm on valid MEA list (to be provided by Procurement at initial meeting) and MEA number OR
  - ii) Include sole-brand justification to use a vendor not on the list OR
  - iii) Include information to begin the competitive bid process (6-8 weeks)
- c) Once the search firm is selected, schedule meeting with the firm and your Workforce Planning Analyst to outline process, search requirements, timelines, future organizational strategy and mission. For Cabinet level positions, the AVP for Human Resources will work closely with the search firm and hiring committee chair to ensure minimum qualifications have been met and that salary discussions are specific and realistic for internal equity.
- d) Once a successful recruitment has occurred, the department can schedule a close-out meeting between Workforce Planning, the search firm, and the hiring department, to verify terms and conditions have been met, including all appropriate applicant summaries and evaluation protocols
  - i) Search firm can attend virtually in order to avoid additional cost
- e) Submit all completed evaluation materials (Selection Packet) to your Workforce Planning Analyst via iSupport
  - i) [iSupport Change Request](#)

### 2) Search Firm Responsibilities

- a) Submit statement/scope of service
- b) Draft search profile/announcement
- c) Identify sourcing strategy and resources to locate candidates
- d) Place advertisements

- e) Screen applicants against provided minimum and preferred criteria
- f) Coordinate with Workforce Planning to collect any applications submitted directly to SJSU
- g) Present the recruitment committee with a short list of the best qualified candidates for telephone and/or on-campus interviews

**3) Human Resources Responsibilities**

- a) Schedule preliminary joint meeting with department/hiring manager, HR and Purchasing to discuss best search firm option to meet hiring needs
- b) Work with department to ensure the contract includes all necessary components to the recruitment process, including a position description in the format outlined by HR
- c) Ensure that the search firm follows the established University policies and guidelines
- d) Identify hiring salary range
  - i) Collaborative effort between Workforce Planning, HR AVP and Hiring Manager
- e) Once WFP Analyst receives position profile/announcement from the department, the position will be posted on the SJSU and CSU career sites, as well as all standard advertising sites, at no charge
- f) Initiate background check on finalists
  - i) For VP/Dean/AVP level recruitments, including all Cabinet level positions, background should be done for all finalists
- g) Once background check clears, send Approval to Extend email via iSupport
- h) After an offer has been made and accepted, the hiring department will reply to the Approval to Extend email via iSupport and provide the new hire details to close the recruitment and start the onboarding process for the new employee

**When to use a search firm?**

Search firms are typically engaged when conventional recruitment methods have failed or for highly classified or specialized positions. At SJSU they have historically been used for Vice President and Dean positions, as well as some Associate Vice President, Associate Dean and Director positions, as well as other MPP positions. Search firm services are costly, so the cost benefit must be weighed by the hiring department.

**Search Firms with Master Enabling Agreements**

Search firms with valid CSU Master Enabling Agreements can be found on the [CSU Contract Store](#) (requires SJSUOne login). However, it is always best to contact Purchasing first.