

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 Talent Acquisition in University Personnel at SJSU.

Overview

A department considering the use of a search firm or employment agency must consult with University Personnel (UP) and [Finance and Business Services](#) 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 University Personnel.

The search firm works on behalf of the University and is responsible for the same applicant tracking University Personnel 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 (Affirmative Action/Equal Employment Opportunity) search documentation responsibilities. UP 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 University Personnel, 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. Request Vice President/Presidential approval
- b. Open a Requisition to Purchase Order with Finance and Business Services
- c. Schedule preliminary joint meeting with hiring manager, University Personnel Talent Acquisition, and Contract Services to discuss best search firm option to meet hiring needs
- d. After preliminary meeting enter Requisition in FTS to begin the procurement process
 - i. Include name of firm on valid MEA list (to be provided 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)
- e. Once the search firm is selected, schedule a meeting with the firm, hiring manager, and Talent Acquisition Specialist to review the process, search requirements, timelines, future organizational strategy and mission
- f. Work closely with your Talent Acquisition Specialist to discuss the anticipated salary range for internal equity
- g. Once a successful recruitment has occurred, the department can schedule a close-out meeting between 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

- h. Coordinate with your Talent Acquisition Specialist to collect any applications submitted directly through CHRS
- i. Complete interview evaluation spreadsheet

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 any additional advertisements
- e. Screen applicants against provided qualifications
- f. Complete application evaluation spreadsheet and submit to the hiring manager/admin support
- g. Present the committee with a short-list of the best qualified candidates for interviews

3. University Personnel Responsibilities

- a. Work with the department to ensure the contract includes all necessary components to the recruitment process, including a position description in the format outlined by University Personnel
- b. Ensure that the search firm follows the established University policies and guidelines and provide the [Voluntary Self Identification Form for Executives](#) link
- c. Identify anticipated hiring salary range
- d. Once the Talent Acquisition Specialist receives position profile/announcement from the department, the position will be posted on the SJSU website as well as all standard advertising sites, at no charge
- e. If the search firm does not conduct reference checks, Talent Acquisition Specialist will initiate through SkillSurvey
- f. Talent Acquisition Specialist reviews all evaluation spreadsheets submitted
- g. Talent Acquisition Specialist gives the hiring manager the approval to extend a conditional offer via Google Form
- h. Background check will be initiated once the offer letter and position description are sent out
- i. Finalist will start once the background check clears

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, as well as some Associate Vice President, Associate Dean, Director, other MPP, and hard-to-fill 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 [Systemwide Agreements for CSU Campuses](#)¹. However, it is always best to contact [Finance and Business Services](#) first.

¹ Requires CSU Login