

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. Any hiring 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)

