

## SEARCH FIRM GUIDELINES CHECKLISTS

# Organizing the Search

The following checklists may be used to assist in forming: 1) a search committee, 2) the search firm strategy and timeline, and 3) the procedures and requirements needed to complete the recruitment process.

### Checklists to complete during this phase:

- HR Process and Requirements
- Forming a Search Committee & Search Firm Strategy
- After Selecting a Search Firm

## HR Process and Requirements Checklist

Consult the following list to keep track of the HR procedures and necessary forms during the search firm recruitment process:

- Complete a CRF process.
- Talent Acquisition will contact the department to determine the intended recruitment process. The hiring department can choose to allow Talent Acquisition to recruit first, and then engage the search firm, or the hiring department can choose to allow the search firm to conduct the entire search.
- Hiring manager should let the Talent Acquisition staff member know if they will be using a search firm.
- Once search firm is identified, Talent Acquisition will contact the search firm to discuss recruitment process, EEO information requirements and applicant tracking.
- HR Consultant will follow up with hiring department regularly so that HR is informed as to which hiring stage the department is in.
- Position will be posted on UAB job listings website for a minimum of 3 days.
- Resumes of qualified applicants received from the UAB posting will be forwarded to search firm for tracking.
- Search firm will submit candidate(s) resume(s) to hiring manager, or search committee chair, for review and will notify HR Consultant or staffing specialist.

- Search firm will forward electronic copies of the interviewees' resumes to the staffing specialist.
- Staffing specialist will upload resume(s) to Taleo and email application to candidate(s) to complete.
- Hiring manager, or search committee, will make hiring selection and notify search firm, HR Consultant and staffing specialist.
- Staffing specialist will begin background check process and will notify the hiring manager or search committee chair when results are returned.
- Offer of employment will be made by the search firm.
- Disposition form(s) will be completed by hiring department representative.
- Offer form will be sent to hiring department by Talent Acquisition.
- Talent Acquisition will generate UAB offer letter.
- HR Consultant/staffing specialist will obtain EEO and applicant information from search firm.
- Position will be closed in Taleo.

## Forming a Search Committee & Search Firm Strategy Checklist

Consider the following steps while forming the search committee and developing the search firm strategy:

- If using a search committee, decide who will be on the search committee and determine the various roles needed to be fulfilled by committee members such as chair, affirmative action representative, etc.
- Identify/explain the required tasks of each committee member in their assigned roles and review the expectations of the committee members regarding confidentiality and meeting attendance.
- Review the charge to the search committee.
- Gain approval to use a search firm by a senior management within your department.
- Plan search committee meeting schedule.
- Develop budget for search, including travel expenses for committee/candidates.
- Review expectations of the search firm regarding HR requirements, communications and other expectations.
- Create the draft outline of the ideal job description and candidate profile to help facilitate the process of selecting the type of firm best for the organization.
- Select a search firm. Refer to the "How to Choose a Search Firm" tab on the [Search Firm Guidelines](#) webpage for helpful information on this topic.

## After Selecting a Search Firm Checklist

Once the department has chosen a search firm, there are steps that can help the recruiting process go smoothly:

- Identify communication methods. Set weekly phone and/or email update schedule with the search consultant to review any issues, receive feedback, and learn of progress.
- Establish clear roles for everyone involved in the recruitment process. For example, what will each person's responsibilities be? Who will be involved in resume reviews, short-list interviews, and final interviews?
- Explore who with the search firm should and should not be contacted. This will help protect relationships and networks as the firm works to build a candidate pool.
- To support UAB's commitment to affirmative action, remind the search firm of the contractual language as it relates to applicant tracking data and EEO requirements. It will benefit the hiring department to include the HR Consultant or a Talent Acquisition representative in the conversation with the search firm related to this subject.