

Search Firm Guidelines Checklist

This checklist serves as a guide to organize and manage the recruitment process when engaging a search firm. It provides steps for forming a search committee, developing a search firm strategy, and completing all necessary procedures and requirements through Central HR Talent Acquisition.

Checklists to Complete During the Recruitment Process:

- Central HR Talent Acquisition Process and Requirements
- Forming a Search Committee and Developing a Search Firm Strategy
- Post-Selection of a Search Firm

Central HR Talent Acquisition Process & Requirements Checklist

Use this checklist to ensure all HR procedures and forms are completed throughout the search firm recruitment process:

- Complete the Compensation Requisition Form (CRF):** Submit the CRF to Talent Acquisition to initiate the process.
- Coordinate with Talent Acquisition:** Talent Acquisition will consult with the department to determine the recruitment strategy. Departments may allow Talent Acquisition to recruit first or engage a search firm for the entire search.
- Notify Talent Acquisition:** Inform Talent Acquisition if a search firm will be used.
- Search Firm Coordination:** Talent Acquisition will contact the search firm to discuss the recruitment process, EEO information requirements, and applicant tracking expectations.
- Regular Updates:** Talent Acquisition will maintain regular communication with the hiring department to stay informed of the current hiring stage.
- Job Posting:** Talent Acquisition will post the position on the UAB job listings website for a minimum of 3 days.
- Resume Handling:** Resumes of qualified applicants received from the UAB posting will be forwarded to the search firm for tracking.

- Candidate Submission:** The search firm will submit candidate resumes to Talent Acquisition, who will share all candidates with the search committee and others.
- Document Management:** The search firm will provide electronic copies of interviewees' resumes to the staffing specialist to be dispersed with the committee.
- Application Process:** Talent Acquisition will upload resumes to Taleo and send application links to candidates to complete.
- Hiring Decision:** The hiring manager or search committee will make the hiring selection and notify the search firm and UAB Talent Acquisition.
- Background Check:** UAB Talent Acquisition will initiate the background check process and inform the hiring manager or search committee chair when results are returned.
- Offer of Employment:** The search firm will extend the offer of employment.
- Disposition Forms:** Disposition forms will be completed by the hiring department representative.
- Offer Letter:** Talent Acquisition will send the offer form to the hiring department and generate the UAB offer letter.
- EEO Compliance:** UAB Talent Acquisition will obtain EEO and applicant information from the search firm.
- Close Position in Taleo:** Talent Acquisition will close the position in Taleo.

Forming a Search Committee & Developing a Strategy Checklist

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

- Forming the Search Committee:** Determine the composition of the search committee, including roles such as chair, affirmative action representative, etc.
- Define Roles and Expectations:** Clarify and communicate the tasks, confidentiality requirements, and meeting attendance expectations for all committee members.
- Committee Charge Review:** Review the charge and purpose of the search committee.
- Approval for Search Firm:** Obtain approval from senior management within your department to use a search firm.
- Meeting Schedule:** Plan the search committee's meeting schedule.
- Budget Planning:** Develop a budget for the search, including expenses such as travel for committee members and candidates.

Define Expectations for Search Firm: Set clear expectations for the search firm, including HR requirements, communication protocols and other relevant considerations.

Draft Position Description: Create a draft of the ideal job description and candidate profile to aid in selecting the appropriate search firm.

Select a Search Firm: Refer to the “Choosing a Search Firm” tab on the [Search Firm Guidelines webpage](#) for guidance on selecting the best firm for your needs.

After Selecting a Search Firm Checklist

Once a search firm has been chosen, follow these steps to ensure a smooth recruitment process:

- Communication Plan:** Establish a schedule for regular updates with the search consultant (e.g., weekly phone calls or emails) to address any issues, receive feedback, and monitor progress.
- Role Definition:** Clearly define roles and responsibilities for everyone involved in the recruitment process, including who will handle resume reviews, short-list interviews, and final interviews.
- Clarify Contacts:** Determine who within the search firm should and should not be contacted to protect relationships and networks.
- Affirmative Action Compliance:** Reinforce UAB’s commitment to affirmative action by reminding the search firm of the contractual language related to applicant tracking data and EEO requirements. Include the HR Consultant or Talent Acquisition representative in these discussions for clarity and compliance.