

CHECKLIST FOR WORKING WITH EXECUTIVE SEARCH FIRM

POSITION TITLE AND POSTING NUMBER:

Name, title and contact information of Hiring Manager:

Name, title and contact information of Search Committee Chair:

Name and contact information of HR Representative:

Name and contact information of search firm representative:

CHECKLIST:

Task	Considerations/Forms
<input type="checkbox"/> Prepare a list of potential executive search firms and vet	<ul style="list-style-type: none"> Consult with the Office of Procurement and Travel Services who maintains a list of executive search firms through the Virginia Association of State Colleges and Universities Purchasing Professionals (VASCUPP) cooperative contracts
<input type="checkbox"/> Select an executive search firm and check references	
<input type="checkbox"/> Craft contractual agreement between GW and search firm	<ul style="list-style-type: none"> Standard template for executive search firm contractual agreements is available from OGC (contracts@gwu.edu) Work with OGC (contracts@gwu.edu), Risk Management (Insurance and Contract), Division of Information Technology - Information Security and Compliance Services, Financial Director of Division/School
<input type="checkbox"/> Contractual agreement routed to EVP&T or Provost for final approval	
<input type="checkbox"/> Competitive recruitment strategy meeting with selected executive search firm	<ul style="list-style-type: none"> Executive search firm may have an intake form. If not, use the completed Recruitment Resource: Competitive Recruitment Strategy Meeting Questions to guide discussion

Task	Considerations/Forms
<input type="checkbox"/> In collaboration with executive search firm, craft job prospectus and GW job description	<ul style="list-style-type: none"> • Ensure the how-to-apply section of all postings includes a reference to applying through search firm and through gwu.jobs portal
<input type="checkbox"/> Provide PeopleAdmin guest user access to search firm	<ul style="list-style-type: none"> • Ensure search firm acknowledges all applicants (outside of PeopleAdmin system) • Ensure executive search firm directs all applicants to apply to both executive search firm website and gwu.jobs portal
<input type="checkbox"/> Advertise, recruit, and source	
<input type="checkbox"/> Work with search firm to develop search firm deliverable timeline document (search firm may have their own document)	<ul style="list-style-type: none"> • Include in timeline regular scheduled conference calls with the search firm for updates
<input type="checkbox"/> Plan for interviews: Develop interview implementation plan for interviews	<ul style="list-style-type: none"> • Recruitment Resource: Résumé Review and Interview Implementation Plan
<input type="checkbox"/> Meeting with executive search firm to present candidates	<ul style="list-style-type: none"> • Get a list from the search firm of all applicants they interviewed • Consider diversity and underutilization. Be able to justify candidates who move on to next stages compared to candidates who do not. Review minimum and preferred qualifications in job description.
<input type="checkbox"/> Ensure interviews are scheduled and assist in logistical planning where needed	
<input type="checkbox"/> Executive search firm should have interview questions. If not, develop interview questions.	<ul style="list-style-type: none"> • Executive search firm may provide you access to their secured portal to access candidate materials
<input type="checkbox"/> Interviews	<ul style="list-style-type: none"> • A representative from the search firm may participate in this round of interviews • Ensure interview rooms are equipped with proper technology (if necessary), water, etc. • Ensure that after the final interview, the interviewers conduct a group candidate assessment and recommends candidates for next step
<input type="checkbox"/> Discussion on identifying finalists	<ul style="list-style-type: none"> • Consider again diversity and underutilization. Be able to justify candidates who move on to next stages compared to candidates who do not. Review minimum and preferred qualification in job description. Interview additional semi-finalists if needed.
<input type="checkbox"/> Finalize the finalist interview implementation plan	<ul style="list-style-type: none"> • Recruitment Resource: Résumé Review and Interview Implementation Plan
<input type="checkbox"/> Plan finalist(s) on-campus interview(s). Coordinate logistics and schedule(s). Work with division contacts and executive search firm.	<ul style="list-style-type: none"> • Don't forget escorts are needed • (If applicable) Does hiring manager want to present finalists summary to President prior to the on-campus interview? • (If applicable) Does the hiring manager want to escort the finalists to the interview with the President?

Task	Considerations/Forms
<input type="checkbox"/> Develop finalist(s) on-campus interview schedule(s)	<ul style="list-style-type: none"> Recruitment Resource - Campus Visit Finalists Interview Schedule
<input type="checkbox"/> Finalize finalist(s) on-campus visit schedule(s) and send to executive search firm along with campus map and any other helpful documents. Executive search firm will send to finalists.	
<input type="checkbox"/> If applicable, in preparation of the President interview with the finalists, send to the contact in the President's office the following materials for each finalist: cover letter, resume, position description, position specification used by the search firm, and the candidates' schedule for the interview day	<ul style="list-style-type: none"> Confirm from the President's office what materials are needed Confirm with the hiring manager the documents you will be sending to the President's Office
<input type="checkbox"/> Search firm should have interview questions. If not, develop finalist interview questions	<ul style="list-style-type: none"> Recruitment Resource: Candidate Feedback Form
<input type="checkbox"/> Provide all interviewers the following: candidate materials, interview questions, ratings sheets, interview guidance, location logistics, etc.	
<input type="checkbox"/> Finalist interviews - on campus	<ul style="list-style-type: none"> Ensure smooth day of activity Consider providing candidates survival bag (mints, water, energy snack, pen, pad, etc.)
<input type="checkbox"/> Have a follow-up meeting with executive search firm	<ul style="list-style-type: none"> Inform executive search firm of next steps and ask them to keep candidates warm
<input type="checkbox"/> Meeting with hiring manager and other appropriate stakeholders (HR Representative) to discuss next steps	<ul style="list-style-type: none"> Ensure that the hiring manager is clear about the next steps in the process (conditional offer, EEO approval, background check) Identify from hiring manager preference of who makes the offer (search firm vs. hiring manager, etc.)
<input type="checkbox"/> Decision on finalist	
<input type="checkbox"/> Collect from executive search firm professional references and share with HR Representative	
<input type="checkbox"/> Share information on recruitment (who was interviewed, why they were not selected, etc.) with the HR Representative for HP creation and submission	
<input type="checkbox"/> HR Representative submits HP	<ul style="list-style-type: none"> Work with search firm to keep finalist and 2nd selection warm during the wait for the Talent Acquisition and Recruitment and EEO approval
<input type="checkbox"/> EEO approval	
<input type="checkbox"/> Meet with executive search firm to discuss next steps	<ul style="list-style-type: none"> Ensure that the executive search firm communicates to the selected finalist about the next steps in the process (conditional offer, background check) Work with executive search firm to keep 2nd selection warm

Task	Considerations/Forms
<input type="checkbox"/> Conditional offer	<ul style="list-style-type: none"> • Negotiation of conditional offer details
<input type="checkbox"/> Background Check	
<input type="checkbox"/> Offer letter	
<input type="checkbox"/> Ensure offer letter is signed	

UPON COMPLETION OF EEO APPROVAL, BACKGROUND CHECK,
AND SIGNED OFFER LETTER:

<input type="checkbox"/> Introduce selected finalist to HR Representative to begin coordination of onboarding	<ul style="list-style-type: none"> • Recruitment Resource: Procedures for New Staff Relocations • Work with TAR on executive onboarding
<input type="checkbox"/> Send executive search firm copy of signed offer letter	
<input type="checkbox"/> Announcement	
<input type="checkbox"/> Schedule and conduct debrief meeting with executive search firm	