Executive & Specialty Search Firm Request for Proposal (RFP) Summary

Systemwide Procurement Services partnered with Systemwide Talent Management to establish the competitive RFP process and invited a diverse group of UC Location Representatives to participate in the review and selection process.

Process Included:

- Defining the scope, evaluating, scoring, reference checking, negotiating, and selecting based on a timeline established by Systemwide Procurement. Over 300 Search Firms were invited to submit a proposal.

Evaluation Team Included:

- Berkeley, Irvine, Merced, San Diego, Santa Barbara, Systemwide Human Resources, UCOP Local Human Resources, Santa Cruz, San Francisco, Riverside, Lawrence Berkeley Lab, and Davis

High-level Timeline:

Over 330 courtesy emails sent to potential bidders regarding the RFP release for marketplace awareness.

Issued Public Bid on July 17, 2019
RFP Responses due on August 7, 2019 by 12pm (PT)
Awarded Agreements Effective January 1, 2020 through December 31, 2024

The overall objective of the RFP was to select multiple Suppliers to support all UC Locations in establishing the most cost effective and efficient search processes for providing Executive & Specialty Search Services while maintaining high standards of quality and service.

As part of the selection process, the RFP process allowed for multiple awards for small, medium and large search firms, based on employee size. Categorized as:

- 10 or Less – Considered Small
- 11 – 25 – Considered Medium
- Over 25 – Considered Large

The goal was to secure quality talent and reduce the Executive & Specialty recruitment spend by:

- Generating a portfolio of Search Firms from a variety of specialty areas to meet Executive & Specialty Search Service needs of all the University of California Locations.
- Identifying, comparing and selecting a portfolio of Suppliers based on their ability to provide a full range of search services and those who are able to provide partial services.
- Identifying, comparing and selecting a portfolio of Suppliers based on their experience and expertise in Executive, Senior Leader and Management/Specialty Level searches.
- Establishing a competitive and strategic professional fee structure with appropriate discounts and invoicing schedules that meet all UC Location's needs.
- Increasing the identification and use of minority and women owned Search Firms.

- Requiring Suppliers to provide accurate detailed agreement management and audit reports on utilization, Search Firm effectiveness, and rate/cost analysis.
- Establishing strategic partnerships with Suppliers that have a proven record of diversity placements, providing high quality of service and responsive communication, delivering on search timelines and experience guiding search committees through full cycle recruitment.

Scope of Work

Suppliers to perform a full range of services related to Executive & Specialty search. Selected Suppliers to be viewed as an active partner in assuring the University receives a high-level of satisfaction during the process, the outcome, and the cost associated with Executive & Specialty Level recruitments. Suppliers were evaluated in groups based on size of the supplier and categorized by job categories, service levels & capacity, and position levels defined below.

Job Categories:

- Athletics
- Center & Institute Leadership
- Compliance, Audit & Risk Management
- Development & Advancement
- Diversity, Equity & Inclusion
- Facilities, Design & Construction
- Faculty & Academic Leadership
- Finance, Accounting & Procurement
- Health
- Human Resources
- Information Technology
- Legal
- Public Affairs & Communications
- Public Sector, Government & Non-Profit
- Research & Sponsored Programs
- Student Affairs & Enrollment

Summary of Proposals Received:

- 51 Firms Responded to RFP
- 49 Valid Responses
    - 16 - Small
    - 14 - Medium
    - 19 - Large
- 2 Disqualified – (Due 12pm PT) Received after close

Awarded Search Firms:

- 39 Search Firms Selected
- 12 (31%) are women, veteran and/or minority owned
- 6 (15%) are Small Business Enterprise (SBE)

Evaluation Scorecard Criteria:

Weight Structure

Level 1	Weight	Level 2 - Category	Weight	Level 3 - Sub Category	Weight
Total	100%				
Written Response	75%	Total	100%		
		Supplier Qualification	35%	Total	100%
				Search Firm Overview and Organizational Structure - 1.a.	30%
				Search Firm Experience - 1.b.	30%
				A list of relevant customers and positions previously filled - 1.c.	20%
				Experience of Principal Individuals Assigned to UC - 1.e.	20%
		Questionnaire	45%	Total	100%
				Account Management	25%
				Approach and Methodologies	30%
				Reporting, Analytics and Technology	25%
				General Search Firm Experience	10%
				Additional Services & Value Added Services	10%
		Sustainability	20%	Total	100%
				Certified as a SBE, DBE, VBE, or DVBE	15%
				Corporate Social Responsibility (CSR) statement/policy/code of conduct or equivalent	7%
				Supports your local community and regional businesses and markets	5%
				Incorporation of environmentally conscious business practices into the delivery of the requested services	5%
				Percentage of certified LEED green building	5%
				Team members assigned to support UC Agreements reflect the diversity of UC and California	8%
				Explain your company's commitment to diversity and how you would support diversity recruitment efforts	25%
				Key positions in your company that supports specialized attention to identifying and recruiting of women and minority Candidates	15%
				Applicant pool that reflects the communities of your customers	15%
Financials	25%	Total	100%		
		Search Cost and Cost Breakdown	30%		
		CAP or Maximum Fee per Search	20%		
		Minimum Fee per Search	10%		
		Discount Available to UC	15%		
		Payment Schedule	25%		

Benefits of using UC approved search firm and resources:

1. No additional RFP is required to use approved search firms and resources

2. Reduced search firm fees (the majority of search firms): average industry fee = 34%, UC fee range = 15% to 33⅓%

3. Discounts for multiple hires, internal hires, and UC volume pricing

4. Enhanced search firm accountability to meet UC search requirements before final payments made to search firm (UC focused* 1/3 payment schedule) (majority of the selected search firms):

   - 1/3 – Search Engagement
   - 1/3 – Candidate Presentation
   - 1/3 – Candidate Acceptance

   ** Improved accountability in comparison to standard industry payment schedule of 1/3 fees payment at search engagement, 60 days, and 90 days, regardless if search requirements are met.*

5. Specific requirements for data reporting and for adhering to Office of Federal Contract Compliance Programs reporting of demographic data upon the completion of every search.

6. The Master Services Agreement also allows flexibility for UC Locations to negotiate additional terms with the Search Firm before entering into a Search Engagement.

UC Search Firm Resource Guide:
https://ucnet.universityofcalifornia.edu/working-at-uc/your-career/talent-management/talent-acquisition-employment/executive_recruitment_and_search.html