

Educating Compassionate and Creative Global Citizens

## OAK PARK UNIFIED SCHOOL DISTRICT BOARD OF EDUCATION AGENDA #1011

## NOTICE OF SPECIAL BOARD MEETING - AGENDA #1011

Written notice is hereby given in accordance with Education Code Section 35144 that a special Meeting of the Board of Education of Oak Park Unified School District will be held:

- DATE: Tuesday, December 8, 2020
- TIME: 6:00 p.m. Open Session
- PLACE: Pursuant to Governor Newsom's Executive Order N-29-20 in regard to the COVID-19 Pandemic, special procedures will be followed for this special board meeting. The meeting will be conducted via teleconference/video conference. Members of the public will have the right to observe the meeting using this link: <u>www.opusd.org/livestream</u>. Members of the public may offer public comment on items on the agenda as provided on page 2 of this agenda.

Roll Call Flag Salute Public Comments – Speakers on Agenda items Adoption of Agenda

## **OPEN SESSION**

## A. BUSINESS SESSION

1. <u>Review and Discussion of Executive Search Firm Proposals for the Recruitment</u> of a New Superintendent and Selection of Finalists to Present to the Board of Education at the December 16, 2020 Board Meeting

A Request for Proposals was sent to Executive/Superintendent Search Firms. The district received five responses. At this meeting, the Board will review the proposals and select the search firms it would like to hear presentations from at the December 16, 2020 meeting.

2. <u>Discuss the Interview Process Including Related Communications</u> The Board will discuss the process for the search firms interview, which will be held on December 16, 2020 and also discuss the communications regarding the search process to the public.

Adjournment

INDIVIDUALS WHO REQUIRE SPECIAL ACCOMMODATION TO PARTICIPATE IN A BOARD MEETING, INCLUDING BUT NOT LIMITED TO AN AMERICAN SIGN LANGUAGE INTERPRETER, DOCUMENTATION IN ACCESSIBLE FORMATS, OR ACCOMMODATIONS DUE TO THE ELECTRONIC FORMAT OF THIS MEETING, SHOULD CONTACT THE SUPERINTENDENT'S OFFICE 24 HOURS PRIOR TO THE MEETING TO ENABLE THE DISTRICT TO MAKE REASONABLE ARRANGEMENTS TO ENSURE ACCOMMODATION AND ACCESSIBILITY TO THIS MEETING. PHONE (818) 735-3206 or e-mail: raggarwal@opusd.org

PURSUANT TO EXECUTIVE ORDER N-29-20, THE BOARD MEETING ROOM IS CLOSED. TO FIND OUT HOW YOU MAY ELECTRONICALLY ATTEND THE BOARD MEETING AND PROVIDE PUBLIC COMMENT PLEASE READ THE FOLLOWING GUIDELINES:

Members of the public will have the right to observe the meeting using this link: www.opusd.org/livestream

Public Comments may be submitted via this link <u>http://www.opusd.org/PublicComments</u>. Your comments are greatly appreciated. The Brown Act requires that agendas for special meetings provide an opportunity for members of the public to address the body concerning any item listed on the agenda prior to the body's consideration of that item (Section 54954.3). Unlike regular meetings, in a special meeting the body does not have to allow public comment on any non-agenda matter. Thank you for your cooperation and compliance with these guidelines.

If you wish to make a comment regarding a matter on the agenda please submit your comment via the form accessed by the above link by 6:00 p.m. on December 8, 2020. Although not required, please submit all of the requested information. In keeping with the reasonable time regulations described below, every effort will be made for your name and comment to be read by the Board President, and your comment will be placed into the item's record at the Board meeting.

This public comment form will be open to members of the public 30 minutes (at 5:30 pm) prior to the public meeting which begins at 6:00 pm. This form will take the place of the "yellow speaker cards" available at in-person meetings.

The President of the Board will inquire if there is anyone in the audience who desires to address the board with respect to any item appearing on the special meeting agenda. Individual speakers will be allowed three minutes to address the Board on each agenda item. The Board shall limit the total time for public input on each item to 20 minutes. With Board consent, the Board president may increase or decrease the time allowed for public presentation, depending on the topic and the number of persons wishing to be heard. Due to the electronic nature of this meeting and to maintain the integrity of providing an opportunity for public comment, every effort will be made to read your comment into the record. In order to ensure that non-English speakers receive the same opportunity to directly address the Board, Google Translate will be used to translate any emails to the Superintendent's Executive Assistant at <a href="maggarwal@opusd.org">raggarwal@opusd.org</a> who will receive and submit the public comments in open session.

All Board Actions and Discussions are electronically recorded and maintained for thirty days. Interested parties may review the recording upon request. Upon request by a student's parent/guardian, or by the student if age 18 or older, the minutes shall not include the student's or parent/guardian's address, telephone number, date of birth, or email address, or the student's name or other directory information as defined in Education Code 49061. The request to exclude such information shall be made in writing to the secretary or clerk of the Board. (Education Code 49073.2)

Date: December 7, 2020

Anthony W. Knight, Ed.D. Superintendent and Secretary to the Board of Education

TO:	MEMB	ERS, BOARD OF EDUCATION
FROM:	DR. ANTHONY W. KNIGHT, SUPERINTENDENT	
DATE:	<b>DECEMBER 8, 2020</b>	
SUBJECT:	A.1.a.	REVIEW AND DISCUSSION OF EXECUTIVE SEARCH FIRM PROPOSALS FOR THE RECRUITMENT OF A NEW SUPERINTENDENT AND SELECTION OF FINALISTS TO PRESENT TO THE BOARD OF EDUCATION AT THE DECEMBER 16, 2020 BOARD MEETING
		DISCUSSION/ACTION
ISSUE:		Shall the Board Review and Discuss Executive Search Firm Proposals for the Recruitment of a New Superintendent and Select Firms to Interview at the December 16, 2020 Board Meeting?
BACKGROUND	):	<ul> <li>On November 17, 2020, the board of Trustees accepted the retirement notice of Superintendent Dr. Tony Knight effective June 30, 2021. As part of the search process for the new superintendent, the board asked staff to put out a request for proposals to Executive Search firms. The request for proposal was sent on November 18, 2020, and five firms submitted their proposals to the District. At this meeting, the Board will review the five proposals and select the firms to be invited for presentation and interview at a Special Meeting to be held on December 16, 2020 at 5:00 pm. The proposals from the following firms are included for the board's review:</li> <li>MacPherson &amp; Jacobson L.L.C.</li> <li>Leadership Associates</li> <li>The COSCA Group</li> <li>Ray and Associates</li> <li>BWP and Associates</li> </ul>
FISCAL IMPAC	CT:	None at this point, once the firm is selected the contract will be funded by the general fund.
ALTERNATIVE	ZS:	<ol> <li>Review Executive Search Firm Proposals for the Recruitment of a New Superintendent and Select Firms to Interview at the December 16, 2020 Board Meeting</li> </ol>
RECOMMENDA	ATION:	At the board's discretion
		Respectfully submitted,

Anthony W. Knight, Ed.D. Superintendent

Board Action: On motion of		, seconded by		, the Board of Education:
VOTE:	AYES	NOES	ABSTAIN	ABSENT
Hazelton				
Helfstein				
Laifman				
Rosen				
Ross				

A Proposal Prepared for



for

*The Search and Selection of a Superintendent of Schools* 

submitted in collaboration with



by <u>MCPHERSON</u> EXECUTIVE RECRUITMENT & DEVELOPMENT



Phone: 888-375-4814 Email: <u>mail@macnjake.com</u> Website: <u>www.macnjake.com</u>



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November 25, 2020

Board of Education Oak Park Unified School District 5801 Conifer Street Oak Park, California 91377

Thank you for the opportunity to respond to your request for proposal. The enclosed proposal describes the professional services the California School Board Association representative, McPherson & Jacobson, L.L.C. will provide Oak Park Unified School District in ensuring your superintendent search secures quality leadership for the district.

McPherson & Jacobson will work with the board to design a search that meets the unique needs of your school district. Our firm's five-phase protocol allows the board to concentrate on the most important segments: the interview and selection of the successful candidate. Our team of consultants, working in conjunction with the board and diverse stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

At the core of our firm's work is the belief that every student be entitled to high quality education and that this is dependent upon quality leadership. We understand that students have diverse needs, thus, we focus on the intentional recruitment of a diverse candidate pool that includes ethnic and cultural identity as well as experience in culturally proficient practices that have proven successful in addressing educational equity gaps. This unique approach is made possible through the diversity and extensive network of our consultants who have various levels of expertise in the school system from superintendents, to school board members, to educational equity experts in the field. We believe this has contributed to our successful placement of qualified candidates around the state and nation who have met extensive equity focused criteria and continue to make an impact in the districts they serve.

McPherson & Jacobson has been conducting searches for boards of education since 1991. Our California consultants will ensure your search results in quality leadership for your district.

Our contact information:

California School Boards Association Attn: Nicole Delos Reyes 3251 Beacon Blvd. West Sacramento, CA 95691 888-375-4814 Email: mail@macnjake.com We welcome the opportunity to meet with your board to present our proposal and discuss our proven search process.

Sincerely,

Than Jus be

Thomas Jacobson Ph.D. Owner/CEO, McPherson & Jacobson L.L.C.

# TABLE OF CONTENTS

The McPherson & Jacobson Difference	3
Executive Summary	4
Five Phases of a Superintendent Search Phase I Phase II Phase III Phase IV Phase V	6 7 9 9
Timeline	13
Conflict of Interest	14
Developing Criteria	14
Advertising	15
Identifying and Recruiting Applicants	16
Applicant Diversity	17
Screening, Reference Checks, Interviews of Final Applicants	18
Background Checks	18
Stakeholder Involvement	19
Responsibilities of Oak Park Unified School District and McPherson & Jacobson, L.L.C	21
Sample Brochures	24
Qualifications and Background of McPherson & Jacobson, L.L.C	27
California Searches Conducted by McPherson & Jacobson, L.L.C	28
Consultants for Search	32
Selected References	36

Investment	37
Price Breakdown for Search Activities	38
Guarantee	39
California Consultants	40
Transparency—The McPherson & Jacobson Difference	41
What Board Members Say About the Service of McPherson & Jacobson, L.L.C	43
Attachment Forms	47

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## The McPherson & Jacobson Difference

## "It's About the Kids"

- WE BELIEVE every student is entitled to a high-quality education. We strongly believe quality education is dependent upon quality leadership.
- OUR MISSION is to ensure your search results in quality leadership for education excellence.

McPherson & Jacobson has developed a protocol that provides for high involvement of stakeholders, while keeping the board in complete control of the process.

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process. The openness of the process has not gone unnoticed. In the *Transparency—The McPherson & Jacobson Difference* section of this proposal you will find a selection from the many articles discussing McPherson & Jacobson's stakeholder involvement, and editorials from newspapers across the country praising boards for being open, transparent, and doing the public business in the public.

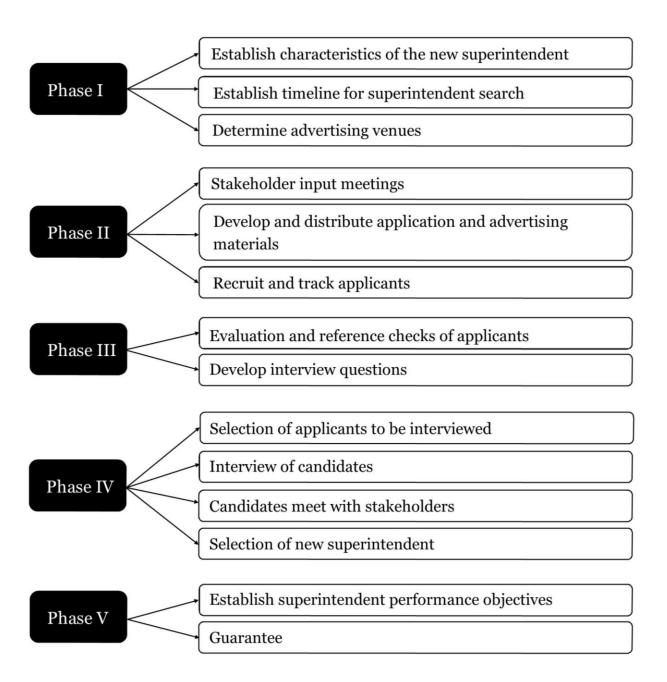
## Executive Summary

McPherson & Jacobson L.L.C. provides a comprehensive search process. Below are some of the highlights of our process:

- Our process is comprehensive and provides critical support for the most timeconsuming aspects of recruiting and screening the candidates, so the board can focus on interviewing and selection.
- Transparency is a hallmark of our protocol. Stakeholder participation emphasizes the transparency of our process.
- We take the entire board through a consensus decision-making process to identify the top criteria for the selection of the new superintendent.
- We meet with groups to ensure broad-based stakeholder input in the selection process. In addition, we provide an online survey to reach out to anyone who could not attend a stakeholder meeting. The consultants will present a comprehensive written report to the board, which includes all of the comments recorded during the input sessions
- McPherson & Jacobson's consultants actively recruit candidates that meet the selection criteria. If desired, we will recruit non-traditional candidates.
- Applicant confidentiality is important to attract top candidates. Names remain confidential until the board selects their finalists.
- We continue to work with your school district until a superintendent is hired and in place.
- Phase V provides a continued commitment to work with your board and new superintendent for one year. We help you collaboratively establish annual performance objectives for the new superintendent's first year. Evidence from previous searches shows this phase to be very positive as it fosters a good transition.
- We are so confident of our ability to identify the district's criteria, recruit and screen applicants against those criteria, and assist during the transition period, that we guarantee our service. If your superintendent leaves for whatever reason during the guarantee period, we will repeat the process for no charge except for actual expenses.

# Our mission is to ensure your search results in quality leadership for education excellence.

## Five Phases of a Superintendent Search



## <u>Phase I</u>

# ✓ Using a group process with the board, identify the most important characteristics of the future superintendent.

The consultants will assist the board in identifying the most important characteristics the board would like the new superintendent to possess. These characteristics will be used as a template for recruiting and selecting candidates.

## ✓ Establish appropriate timelines and target dates for the selection process.

The consultants will prepare a proposed calendar for the search process. Dates for advertising the announcement of vacancy, closing date, dates for interviewing, a target date for selecting the new superintendent, and a date for the new superintendent to begin will be determined.

## ✓ Determine, with the board, appropriate advertising venues.

The consultants will assist the board in determining the scope of the search. Appropriate media venues (professional journals, trade papers, newspapers, and websites) and associated costs will be presented for consideration.

## ✓ Identify appropriate stakeholder groups.

The board will identify the various stakeholder groups that they want McPherson & Jacobson's consultants to meet with to solicit input into the process.

## $\checkmark$ Assist the board in determining compensation parameters.

In order to recruit and select top candidates, compensation packages need to be competitive. Our consultants will present data indicating what districts in the same geographic region and similar size are paying superintendents. Whenever possible, they will also present compensation information for districts that recently hired a superintendent. This information is provided for the board's consideration of compensation parameters.

Final compensation decisions will be determined by the board and the selected candidate.

## ✓ Identify the point of contact for the district

The board will identify an appropriate staff person to work with the consultants to coordinate the logistics of the search. This includes tasks such as assisting with information for the promotional brochure, and coordinating details for stakeholder input and other meetings within the district.

## <u>Phase II</u>

## ✓ Work with the district to schedule the stakeholder input meetings.

The consultants will work with the district's point of contact to determine the stakeholder input schedule and coordinate notifying the stakeholders about the meetings.

# ✓ Meet with groups identified by the board to provide stakeholder input into the selection process.

The consultants will meet with the stakeholder groups identified by the board and solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the issues facing the new superintendent, and the characteristics they would like to see the new superintendent possess. The board chooses which groups it would like the consultants to meet with, but the most common groups include central office administrators, building administrators, teachers, classified staff, students, and community and business groups. The consultants will assist the board in choosing which groups it wishes to include.

For any unable to attend a stakeholder meeting, we provide an online version of the questions we ask the groups. At the request of the district, the survey can be available in multiple languages.

The results of the stakeholder meetings and online stakeholder input are summarized by the consultants and presented to the board.

## ✓ Develop promotional literature and brochures announcing the vacancy.

In order to attract quality applicants, it is important to promote your school system and community. With on-site assistance from the district, the consultants will assist in preparing an announcement of vacancy that highlights the strengths of your school system and community. Our graphic artist will prepare a professional color brochure that highlights the school district and community, including the board's selection criteria, the board members, and the application procedures and timelines.

## ✓ Prepare and place announcement of vacancy.

McPherson & Jacobson's staff will prepare and place the announcement of vacancy. It will be sent to all state school board and administrator associations, as well as media venues selected by the board. Additionally, McPherson & Jacobson maintains an interactive website (www.macnjake.com) that allows applicants to access all the application materials and apply on line. The website averages over 150,000 hits per month.

# ✓ Develop an application unique to your vacancy that reflects the selection criteria determined by the board.

McPherson & Jacobson's staff will create an application form requiring applicants to describe their strengths and experiences relating to each criterion identified by the board. This will be one of the preliminary screening devices used by the consultants when assessing potential candidates.

## ✓ Post application information and notify interested applicants.

McPherson & Jacobson's staff contacts potential applicants and manages all the application materials using our online application software. Our office staff handles this task without assistance from your district.

## ✓ Actively recruit applicants who meet the district's needs.

While McPherson & Jacobson does not represent candidates, we actively maintain a data bank of quality candidates. Once the board has chosen its selection criteria, we will send the information to all of our consultants across the United States, asking them to nominate candidates who would be a good match. We will encourage those candidates to apply. Some of the best candidates may not be actively seeking another position and will need to be recruited.

McPherson & Jacobson stays current with trends in educational leadership by being an active participant and presenter at national and state education conferences. We participate in Job Central at the American Association of School Administrators conference, the National School Boards Association annual conference, and others such as the AASA Women's Leadership Conference.

## ✓ Confidentiality of Applicants

McPherson & Jacobson proposes an open process for the search. We believe the public business should be done in public with openness and transparency. We also understand the need for applicants' confidentiality. Our process keeps the names of all applicants confidential until they are named a finalist for the position, at which time we recommend the names of the finalists are made public

If the board believes that the names of the finalists should be kept confidential until they make their selection, we can do that. This is your search and we will adapt our process to fit your unique needs.

## ✓ Keep all applicants informed of their status in the selection process.

During the application process, McPherson & Jacobson's staff monitors applicants and notifies them of what is still needed to complete the process.

## ✓ Communicate with all Board Members in a timely manner

The consultants will communicate with all board members keeping them informed of the status of the search throughout the process.

## <u>Phase III</u>

## ✓ Evaluate each applicant against the selection criteria.

The consultants will read and evaluate all of the completed files submitted by applicants. They will read the application form and all of the additional material in each file and begin reviewing against the selection criteria.

## ✓ Conduct reference checks.

We understand that applicants do not submit references who will not speak highly of them. We begin with the references given and ask them a list of questions relevant to the selection criteria. After asking those questions, we ask each reference to give us the names of other people who can speak of the applicant's qualifications. We then call those individuals and ask them the same set of questions, including asking them to give us the names of other people who can speak of the applicant's qualification. We go a minimum of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

In addition to contacting references, the consultants conduct an extensive Internet search of the applicants.

## ✓ Pre-Interview and Video of Shortlist Applicants.

The consultants will pre-interview applicants to be submitted on the shortlist. We will have these applicants submit a video which the consultants will share with the selection committee.

# $\checkmark$ Assist the board in developing a set of interview questions that reflect the identified selection criteria and characteristics.

The consultants will present an extensive list of potential interview questions that reflect the selection criteria and characteristics desired by the board. The board members choose interview questions that reflect their criteria and priorities.

If the board chooses to conduct two rounds of interviews, the consultants will assist in developing interview questions for both rounds of interviews.

## Phase IV

## ✓ Review candidates with the board and assist board members in determining which candidates they will interview.

The consultants will present a complete list of applicants, who completed the application process, to the board for its review. We do not eliminate any applicants; however, a short list will be submitted of those applicants who we found most closely met the district's criteria. The consultants will present a reference profile demonstrating the consistent feedback for each short list applicant.

Upon reviewing the recommendations, the consultants will assist the board members in identifying which applicants they wish to consider as candidates for interviews.

## ✓ Assist the board in determining interview procedures.

After the board selects their final candidates to interview, the names of the candidates will be made public upon confirming the interviews. During the interview process, the stakeholder groups will have an opportunity to meet the individual candidates.

If the board chooses to conduct semi-finalist interviews, the candidates will only meet with the board. The names of the semi-finalist candidates will remain confidential (in states where an executive session is allowed), and stakeholders will not meet the semi-finalists. The finalist interviews will be conducted as described in the paragraph above.

## ✓ Coordinate interview and visitation procedures.

If the board chooses, McPherson & Jacobson will schedule semi-finalist interviews. Semi-finalist interviews are typically conducted with the board only. After the semi-finalist interviews, the board will select their finalists.

If the board chooses to involve stakeholder groups in the interview process, the consultants will assist in establishing the finalist interview schedule that includes district staff, students, and community groups. A typical interview day will include a tour of the district and community, meeting with stakeholder groups, and a formal interview with the board.

# ✓ Assist the groups identified by the board in planning for meeting each candidate and providing feedback to the board.

If the board chooses to involve stakeholder groups in the interview process, representatives will be selected from the stakeholder groups identified by the board. The purpose of these groups is two-fold: 1) to promote the school district and community to the candidate; and 2) to form an impression of each candidate, which they will share with the board. The board will identify chairpersons for each stakeholder group. The consultants will meet with the chairpersons to discuss their roles and responsibilities. The consultants will also provide the chairpersons with a form to record the group's consensus impressions of each candidate's strengths and any concerns or questions the group may have. Each form will be sealed in an envelope and turned in to the district contact person.

## ✓ Coordinate visitation procedures for the candidate's spouse/significant other.

We encourage boards to invite spouses/significant others to attend the interview day. The consultants will coordinate, with the point of contact, a portion of the interview day for the spouse/significant other to have an expanded visitation of the community. Tours typically include available housing, medical facilities, churches, recreational opportunities, and areas of interest unique to your community.

## ✓ Assist the board in making final arrangements for each candidate's visit.

It is common practice for the district to pay interview expenses for the candidates and their spouses/significant others. In order to ensure that expenses stay within established guidelines, the consultants will assist the point of contact in making lodging and travel arrangements for each candidate.

## ✓ Contact all finalists and schedule their interview dates.

The consultants will contact the final candidates, notifying them they are finalists for the position and scheduling their interview dates. The consultants will be the contact for answering any questions and coordinating the candidates' visits to the district.

## ✓ Notify all applicants not selected for an interview.

Once the board has selected its final candidates, all other applicants will receive, on behalf of the board, a personalized notification thanking them for taking the time to complete the application materials and notifying them that they are not a finalist.

## ✓ Personally contact each finalist who was not offered the position.

Once a contract has been offered by the board and accepted, the consultants will call each of the other final candidates and thank them on behalf of the board for interviewing for the position. *These candidates are not notified until an offer has been accepted*. If by chance you lose your top candidate, we want to keep viable candidates available.

## ✓ Conduct background checks.

Included in the fee is a criminal/financial/credential verification background check for the selected candidate. For an additional fee, the board can choose background checks for all of the finalists.

## <u>Phase V</u>

## ✓ Establish performance objectives for new superintendent.

Working with the board and new superintendent, the consultant will assist in establishing two or three performance objectives the board wants the superintendent to focus on during the first year. These objectives are beyond the day-to-day school district operations.

Once the performance objectives have been identified, board members will be asked what they will accept as evidence of progress towards the accomplishment of the identified objectives.

The superintendent will take the information generated from this session and develop an action plan for achieving the performance objectives. The action plan will be presented to the board for formal approval and forwarded to McPherson & Jacobson's home office.

## ✓ Provide a guarantee.

If the board chooses to use our complete service, we will guarantee our process for two (2) years. If the person selected leaves the position, *FOR WHATEVER REASON*, within the guarantee period, we will repeat the process at no charge except actual expenses.

We are convinced that our process of identifying your most important selection criteria, meaningfully involving stakeholders, screening candidates against the criteria, and working with you during the critical first year, will ensure your search results in quality leadership for education excellence.

## Timeline

The timeline for the search process is established when we meet with the board so we can address the unique needs of the district. However, the time from our first meeting with the board until the finalist is selected is typically a minimum of two to three months.

**Proposed timeline**: (can be adjusted to meet the needs of the board and district)

- > At the beginning of the search (**mid-January 2021**)
  - Advertising decisions are made
  - The qualities for the new superintendent are identified
  - Application information is posted
  - A formal timeline is established
  - A brochure is created to advertise the district and the vacancy
- > At the time designated by the board (late January 2021)
  - Stakeholder group meetings are held
  - A summary of stakeholder input is presented to the board
- > As applications arrive in our office
  - Applications are monitored and applicants are notified of the deadlines to submit their materials
- > After the closing date (early March 2021)
  - All the completed applicant files are forwarded to the consultants
  - The consultants begin the review and pre-interview process
- > Approximately two to four weeks after the closing date (late March 2021)
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles of qualified candidates to the board
  - The board selects the candidates it wants to interview
  - McPherson & Jacobson notifies each applicant not selected for an interview
- Soon after the board selects their candidates (mid-April 2021)
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent
  - A criminal/financial/credential verification background check is conducted on the selected candidate
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

## **Conflict of Interest**

McPherson & Jacobson, L.L.C. does not have any current or former District employee, or relative of a District employee, employed or on the firm's governing board as of the date of submittal of this proposal.

## **Developing** Criteria

Using Nominal Group Technique, the consultants will assist the board in identifying the most important characteristics the board would like the new superintendent to possess. These characteristics will be used as a template for recruiting and selecting candidates.

## Advertising

The consultants will discuss with the board the advertising options available and the pricing for them. The advertising we recommend are the following online venues:

- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin

McPherson & Jacobson will not place any media advertising without approval from the board.

Additional advertising/recruiting tools provided at no additional cost to the district:

- The opening and application materials will be posted on the McPherson & Jacobson website which averages 225,000 hits per month
- Information regarding the position will be sent to the over 110 McPherson & Jacobson consultants located nationwide asking for names of potential applicants
- The over 1,000 potential applicants registered with McPherson & Jacobson will receive an email giving them opportunity to apply

## Identifying and Recruiting Applicants

While McPherson & Jacobson does not represent candidates, we keep a data base of quality candidates. Once a board identifies the characteristics it desires in its new superintendent, the consultants from McPherson & Jacobson, L.L.C. will identify and aggressively recruit, on a national level, candidates who match the board's identified criteria.

Over one-fourth of McPherson & Jacobson consultants are minorities or female. We use our consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants.

McPherson & Jacobson stays current with trends in educational leadership by being an active participant and presenter at many national and state education conferences. We participate in Job Central at the American Association of School Administrators (AASA) Conference, the National School Boards Association annual conference, and others such as the AASA Women's & Minority Leadership Conference. In addition, McPherson & Jacobson consultants are members of the National Alliance of Black School Educators (NASBE), and the Association of Latino Administrators and Superintendents (ALAS).

Once the board has identified its selection criteria, the consultants of McPherson & Jacobson will immediately begin to identify potential applicants both locally and nationally. McPherson & Jacobson has over 100 consultants across the United States; we will send the information to all of our consultants across the United States, asking them to nominate candidates who would be a good match. Those candidates will be invited to apply. Some of our best candidates may not be actively seeking another position and will need to be recruited.

We do not maintain a stable of candidates, but we do follow the careers of successful administrators. Individuals who are currently looking to take a new position are encouraged to register with us so they can receive notification of the vacancies we are representing. We have over 900 potential applicants currently registered with McPherson & Jacobson who will receive notification of the superintendent opening. Additionally, we will vigorously pursue current or emerging leaders through personal contact.

We have maintained an ongoing presence at the American Association of School Administrators' Job Central at their annual conference where we have an opportunity to meet and interact with potential applicants. We maintain an ongoing presence at the National Association of School Boards' annual conference. We represent one state school board association as their superintendent search process; therefore, we are the only private firm allowed to participate in their Job Central.

Our searches draw applicants from across the United States. Most searches have applicants from 10 to up to 25 states apply. Some of our searches also have applicants from outside the United States.

## **Applicant Diversity**

While McPherson & Jacobson does not represent candidates, we keep a data bank of quality candidates. Once a board identifies the characteristics it desires in its new superintendent, the consultants from McPherson & Jacobson, L.L.C. will identify and aggressively recruit, on a national level, candidates who match the board's identified criteria.

McPherson & Jacobson has **over 110 consultants** across the nation. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

We use our consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants.

For the past five years, approximately **one-third** of our applicants have been female and almost **one-fourth** of our applicants have been ethnically diverse.

In the past ten years, **one-third** of our placements have been women or ethnically diverse candidates.

## Screening, Reference Checks, Interviews of Final Applicants

The consultants will read and evaluate all of the completed files submitted by applicants. They will read the application form and all of the additional material in each file and begin comparing it against the selection criteria.

We understand that applicants do not submit references who will not speak highly of them. We begin with the references given and ask them a list of questions relevant to the selection criteria. After asking those questions, we ask each reference to give us the names of other people who can speak of the applicant's qualifications. We then call those individuals and ask them the same set of questions, including asking them to give us the names of other people who could speak of the applicant's qualification. We repeat the process until we have complete knowledge of the applicant's strengths and weaknesses. If we find any racial biases during this comprehensive vetting process, we will not be recommending those individuals for consideration.

The consultants will present a complete list of applicants to the board for its review. We do not eliminate any applicants. We will submit a short list of those applicants who we feel most closely meet the district's criteria and will present a written analysis for each.

Upon reviewing the applicants, the consultants will assist the board in determining which applicants it wishes to consider as candidates for interviews.

The consultants will assist the board in establishing the interview schedule. Working with the board, the consultants will set up an interview schedule that will give the candidate a tour of the district and community. The consultants will also help the board identify groups for each candidate to meet. Typically, the same groups the consultants met with to receive input into the selection process will also spend time with each candidate. Finally, the consultants will help coordinate the formal and informal interview process with the board.

The consultants will contact each final candidate; notifying them they are a finalist for the position and scheduling their interview date. The consultants will be the contact for answering any questions and coordinating the candidates' visits to the district.

Once the board has offered a contract to the final candidate, and it has been accepted by the candidate, the consultants will call each of the other final candidates and thank them on behalf of the board for interviewing for the position. *Final candidates are not notified until a contract has been signed*. If by chance you lose your top candidate, we want to keep viable candidates available.

## **Background Checks**

Included in the fee is a criminal/financial/credential verification background check for the selected candidate. For an additional fee, the board can choose background checks for all of the finalists.

## Stakeholder Involvement

## Initial stakeholder input sessions

The consultants will meet with groups identified by the board to solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the characteristics they would like to see the new superintendent possess, and the issues facing the new superintendent. The results of these meetings are summarized by the consultants and presented to the board. The board chooses which groups it would like the consultants to meet with, but the most common groups include central office administrators, building administrators, teachers, classified staff, students, and community and business groups. The consultants will assist the board in choosing which groups it wishes to include. An online survey option will be provided to stakeholders who are unable to attend the scheduled meetings.

## Meeting the candidates

A representative group of eight to twelve people will be selected to represent each of the groups identified by the board. The consultants will meet with a chairperson for each group to discuss their roles and responsibilities. The purposes of these groups are two-fold: one, to promote the school district and community to the candidate; and two, to form an impression of each candidate, which they will share with the board. The consultants will coach each group on how to conduct the meeting with each candidate and what questions they can or cannot ask. The consultants will also provide the chairpersons of each candidate. The forms will be sealed in an envelope after meeting with each candidate and turned in to the district contact person. Upon completing the interview process with all candidates, the board will receive and open the forms from each group.

## **Process for Obtaining Staff Input**

The consultants will meet with central office administrators, building administrators, teachers, classified staff, and students, to solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the characteristics they would like to see the new superintendent possess, and the issues facing the new superintendent. The results of these meetings are summarized by the consultants and presented to the board.

Our normal protocol is to host meetings for the teachers and classified staff in the afternoon, right after school dismissal to give the maximum opportunity for the staff to participate. Central office and building administrator meetings are scheduled at multiple locations to maximize the opportunities for their input. Student input sessions are not scheduled during class time, they are normally held during lunch breaks.

## **Process for Obtaining Parent and Community Input**

The consultants will meet with parents and community stakeholders, to solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the characteristics they would like to see the new superintendent possess, and the issues facing the new superintendent. The results of these meetings are summarized by the consultants and presented to the board.

Our normal protocol is to host meetings for the parents and community stakeholders in the evenings at multiple locations to allow as many stakeholders as possible to give their input.

## **Process for Obtaining Online Stakeholder Input**

McPherson & Jacobson will create an online input survey to allow stakeholders to submit their input. At the request of the district, surveys for multiple languages can be developed and posted.

## Responsibilities of Oak Park Unified School District and McPherson & Jacobson, L.L.C.

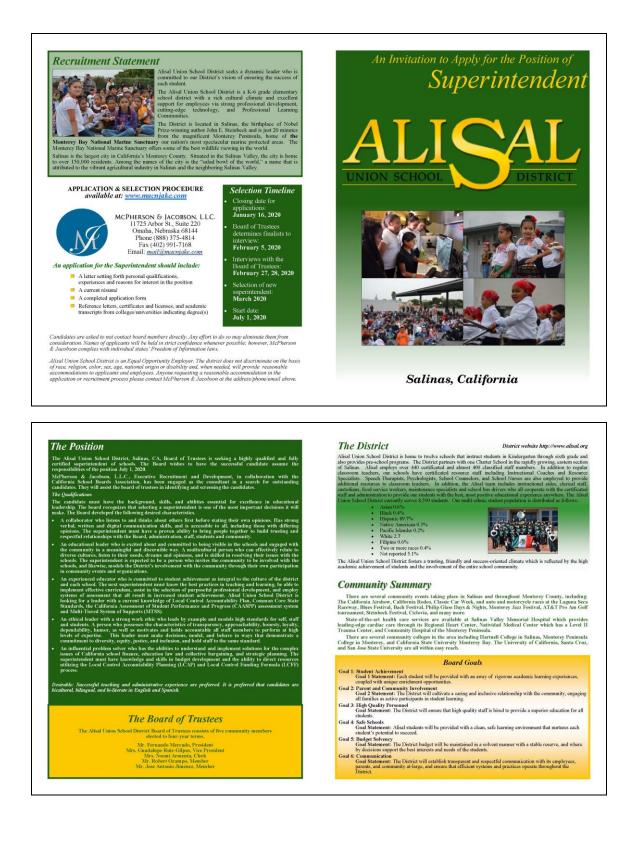
Event	McPherson & Jacobson's Tasks
1 <sup>st</sup> board meeting	<ul> <li>The consultant guides the board in determining the following items         <ul> <li>Characteristics for the new superintendent</li> <li>The search calendar</li> <li>Compensation parameters</li> <li>Identify the appropriate constituent groups for stakeholder input</li> <li>Advertising venues</li> </ul> </li> <li>The consultant works with the Point of Contact to compile:         <ul> <li>Information to create the brochure announcing the vacancy</li> <li>The list of names to be invited to the community input meetings</li> </ul> </li> </ul>
After 1⁵t meeting	<ul> <li>Application link is posted online</li> <li>Brochure announcing the vacancy is created</li> <li>Advertising is started</li> <li>Vacancy announcements are sent out</li> <li>E-mails are sent to applicants registered with McPherson &amp; Jacobson notifying them about the opening</li> <li>E-mails are sent to consultants regarding the opening, requesting they invite candidates to apply for the position</li> <li>Opening is posted on social media and additional venues</li> </ul>
During application period	<ul> <li>Consultants recruit candidates that fit the position</li> <li>Monitors applicants and where they are in the application process</li> <li>Notifies applicants of the closing date for submitting their materials</li> <li>Lead consultant keeps the board up-to-date on the search</li> </ul>
Stakeholder meetings are scheduled	Home Office sends out invitations to the community stakeholder meeting(s) after receiving the information from the consultant and the district
Stakeholder meetings	<ul> <li>Consultants facilitate the stakeholder meetings, recording the input</li> <li>An online stakeholder input survey is created, the link is posted on the McPherson &amp; Jacobson website and also provided to the district to post</li> </ul>
Stakeholder meetings completed	<ul> <li>Consultant summarizes key themes and gives the results to the district</li> <li>Copy of summary is sent to Home Office</li> <li>The stakeholder input summary report is created</li> </ul>
2 <sup>nd</sup> board meeting	<ul> <li>Review stakeholder input summary report and provide copies to the district</li> <li>The consultant guides the board in determining the following items         <ul> <li>Interview questions</li> <li>Length of contract, moving and interview expenses</li> <li>Spouse/significant other's involvement in interview process</li> <li>District Interview Schedule</li> <li>Candidate Daily Interview Schedule</li> </ul> </li> <li>Interview questions are sent to Home Office to be formatted</li> </ul>
Prior to 3 <sup>rd</sup> board meeting	<ul> <li>Applicant packets are reviewed by the consultants and reference checks are performed</li> <li>Contact candidates on short list and verify their interest in the position</li> <li>Meet with stakeholder group chairs to review schedule, procedures and screen questions</li> </ul>

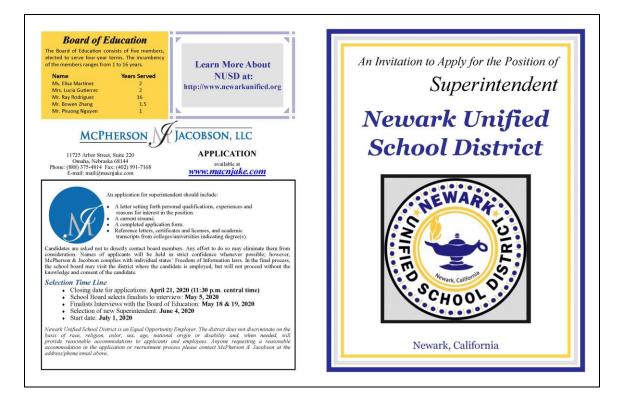
Event	McPherson & Jacobson's Tasks
3 <sup>rd</sup> board meeting	<ul> <li>The consultant facilitates the board's         <ul> <li>Review of the list of all applicants</li> <li>Overview of candidates on short list</li> <li>Selection of finalists</li> <li>Finalizing of interview dates &amp; schedule</li> <li>Review of interview questions &amp; procedures</li> <li>Finalizing candidate &amp; spouse/significant other arrangements</li> </ul> </li> <li>Contact finalists and schedule interview dates, review schedule, discuss compensation and contractual issues</li> <li>Work with Point of Contact to coordinate interviews (transportation, lodging, interview locations, etc.)</li> <li>Send Candidate Daily Interview Schedule to each finalist</li> </ul>
Interviews	<ul> <li>Notify the applicants who were not selected to be interviewed</li> <li>Call Point of Contact after 1<sup>st</sup> interview to learn how it went</li> <li>Call 1<sup>st</sup> candidate to learn their perspective and how the interview went</li> <li>Suggest any possible improvements</li> <li>Be available for questions</li> <li>Be present at interviews if request is made by school district</li> </ul>
Finalist selected and accepted	<ul> <li>Call and make offer to candidate</li> <li>Verify acceptance</li> <li>Conduct criminal/financial/credential verification check on selected candidate</li> <li>Call other finalists</li> <li>Sends out letter of congratulations to candidate who was chosen</li> </ul>
Phase V	<ul> <li>Facilitate board and superintendent's identification of 2-3 performance objectives and evidence of progress the board will accept</li> <li>Consultant reviews superintendent's plan</li> </ul>

## **Oak Park Unified School District**

Гт	
1 <sup>st</sup> Board Meeting	<ul> <li>Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the Board Contact List</li> <li>Reviews and approves the brochure</li> </ul>
During application period	<ul> <li>Posts a link to the McPherson &amp; Jacobson website</li> <li>Posts the brochure (announcement of vacancy) on their website</li> <li>Advertises the opening on the district's social media platforms</li> </ul>
Stakeholder Group Input Meetings are scheduled	<ul> <li>Assists in organizing stakeholder focus groups and meeting schedule</li> <li>Names and addresses are sent to Home Office for community meeting invitations</li> <li>Posts meeting dates, times, and locations as open public forum</li> <li>Assists in translating stakeholder input survey into the additional language(s) requested by the school district</li> </ul>
Stakeholder Group Input Meetings	Link to online stakeholder input form(s) is (are) posted on the school district website
Stakeholder Group Input Meetings completed	Stakeholder Input Report" is posted on the school district website
3 <sup>rd</sup> board meeting	<ul> <li>Assist with lodging arrangements and welcome gifts</li> <li>Arrange for spouse/significant other tour</li> </ul>
Interviews/ Finalist interviews (if board requests semi- finalist interviews)	<ul> <li>One candidate per day</li> <li>Board member greets each candidate upon arrival to district</li> <li>Informal interview-social setting</li> <li>Formal interview</li> <li>Spouse/significant other's visitation is coordinated</li> </ul>
Meeting to Select Finalist/ Finalist selected and accepted	<ul> <li>Board meets and discusses each candidate individually</li> <li>Read input forms submitted by stakeholder input groups</li> <li>Have each board member rank order candidates</li> <li>Select minimum of #1 and #2 candidate</li> <li>Call and make offer to candidate</li> <li>Send interview forms and files to the Home Office</li> <li>Board evaluates our services</li> </ul>
Phase V	<ul> <li>Superintendent creates plan with target objectives and timelines</li> <li>Plan is sent to consultant to be reviewed</li> <li>Board adopts plan</li> </ul>

## Sample Brochures





#### The Position

The Newark Unified School District, Newark, California Board of Education, is seeking a highly qualified and fully certified Superintendent. The Board wishes to have the successful candidate assume the responsibilities of the position on or before July 1 2020. McPherson & Jacobson, LLC, Executive Recruitment and Development, in collaboration with the California School Boards Association, has been engaged as the consultant in a search for outstanding candidates. They will assist the Board of Education in identifying and screening the candidates.

- The Qualifications
- e <u>dualifications</u> The candidate must have the background, skills, and abilities essential for excellence in educational kedenship. The ard recognizes that selecting a superintendent is one of the most important decisions it will make. The Board webpord the following desired characteristics. An educator who is committed to student excellence and achievement. The next superintendent must know the best practices in traching and learning, be able to implement effective curriculum and instruction, assist in the selection of purposeful professional development, and employ systems of assessment that all result in increased achievement for all students. Never, White School District is looking for a creative and inconstret public school educator who possesses current experience and hnowledge when supervising the instructional program.
- council wind possesses current experience and nonverger winer supervising we insolutional program. An effective collaborator and communicator who listen is and thinks about others first before stating their ow opinions, has strong verbal, written, and digital communication skills, and is accessible to all. The superintender must be a team builder who is able to bring people together establishing trusting, transparent, inclusive, and respectful relationships with the Board, administration, staff, students, and community. A superintendent that ha
- respectful relationships with the Board, administration, staff, students, and community. A superintendent demonstrated a willingers, understanding and ability to engo ethers in diffucti conversation about et equity, and what is necessary for all students to achieve and feel safe. This leader must be an experience solver who effectively implements an inclusive decision-mains process. An executive manager who has demonstrated fiscal and human resources expertise ensuring o application of administrative policy and the ability to implement long-range plans that benefit stud superintendent must have knowledge and skills in budget development, fincal management, the ability resources utilizing to lead (control Accunability Frauming (LAP) process and be able to implement and ensure the lead (control Accunability Frauming (LAP) process and be able to implement and ensure the lead (control Accunability Frauming (LAP) process and be able to implement and ensure the solar based for the lead (control Accunability Frauming (LAP) process and be able to implement and ensure the solar based to advect and the solarity to the solar based to advect the solarity of the solarity of the solar to advect and the solarity to advect the solarity of the nel practices of evaluation, hiring, and discipline that are in accord with California Educat
- employment law. An ethical leader with strong work which who have by example and holds high standards for self, staff, and an ethical leader with strong work which who have by example and holds high standards for self, staff, and students. A role model who possesses the characteristics of horesty, courage, accountability, humor, and empathy. This leader must have decisions, model, and behave in ways that demonstrate professionalism, integrity, justice, and equity and hold staff to the same standard. Neader who is excited about and committed to being wible in the schools and engaged with the community and header who is excited about and committed to being wible in the schools and engaged with the community and person who investing the community to be involved with the schools and theric schulter. Either to their needer dreams and opinions, and is skilled in resolving their issues with the schools. The superintendent is expected to be a person who invest the community to be involved with the schools and theric mathy. Dirich there were an expected to be involved with the schools and theric mathy.
- dministrative experience is required, preferably at the cabinet level or high ed that candidates have at least a Master's Degree in their chosen field. to speok Spanish is preferred.
- ollment environment is preferable

#### Mission Statement

Newark Unified School District will inspire and educate all students to achieve their full potential and be responsible, respectful,

#### **Vision Statement**

Newark schools, in partnership with the community, will be a model of world-class education that develops the unique abilities of every student.

#### The District

The District The Newark Unified School District (NUSD) operates right (8) elementary school, one (1) junior high school, one (1) comprehensive high school, one (1) continuation bigh school, one (1) independent study high school, and one (1) adult school. In addition, the school district offers one (1) preschool school school school school school of school one of the elementary school sites. NUSD serves a very diverse population of hydroten school school school school school school school previous the school previous high school school

also serves students with diabilities, who make up 12 percent of the total enrollment. The NUSD is in partmership with the California Collaborative for Educational Excellence (CCER), a state agency mandated under California's Local Control Funding formula (LCFH to offer support to school districts meeting certain criteria based on the performance dashboard. Through this partmership, NUSD receives personalized, immediate, and evidence based support. The school district aff are currently writing the 2025 Strategic Plan. In May 2018 the NUSD Board of Education passed the SEAM Education Policy Resolution No. 2104. This resolution is intendent to provide authentic learning experiences that integrate science, technology, engineering, art, and mathematics to contribute to a fuller indenstanding and enrichment of the world as responsible, respectful and productive cittern. The NUSD staff and faulty believe that through STAM devication, students will be able to explore the world around them, create insolations to problems, and engage in collaborative conversations. The total projected revenue for the Newark Unified

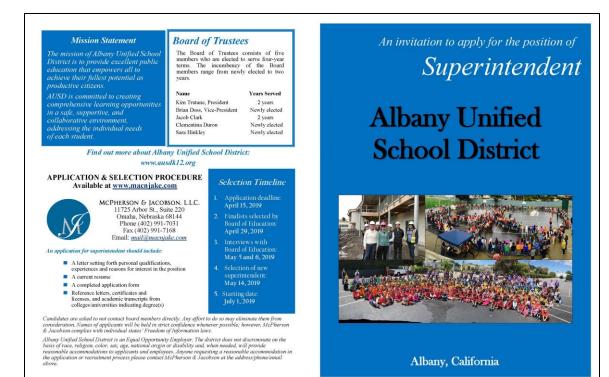
collaborative conversations. In the second s

### The Community

The Newark Unified School District Newark, which is located 35 miles

Bay





#### The Position

The Board of Trustees for the Albany Unified School District, Albany, California, is seeking a high qualified and fully certified Superintendent. The Board walks to have the successful candidate summe the responsibilities of the position July 1, 2004. The superintendent scheme transfer NetPherson & Jacobson, L.J.C., Executive Recruitment and Development has been engaged as the consultant in a search for outstanding candidates. They will assist the Board of Trustees in

D) st have the background, skills, and abilities essential for excellence in educational leadership izes that selecting a superintendent is one of the most important decisions it will make. The lidates that have a proven ability and demonstrated accomplishment for the following

on of purposeful professions sed achievement for all students s. This in application to s, and the CAASPF

onsideration

Successful teaching and administrative experience are preferred. It is required that candidates have a Master's Degree. A Doctorate in education is preferred

. nia administrative credential is preferred.

#### **The District**

LINE DISTICT
any Unified School Diaries—In the words of our retring Superintendent, Valerie Williams, Nauny Unified School Diaries
(SD) is small, but mighty AUSD serves approximately 3700 students in Transitional Kindergraterin (TK) through 12th grades
in AVA and the set force determining school Advance Tiple School (AISS) setup and the setup in the setu

youth. In tool, inproximately 28% of the students enrolled in TK-12th grade quality for free or reduced hards, are English learners, and/or are foster youth. Albumy aligns services and expenditures to three overnething strategic Diritrit goale. 1) Assess & Hercease Academic Saccess 2, Spectra the White, Hull, 3) Communication and Loai Together, April of our emphasis on the white child, AUSD supports in have participate on a spectra term of the strategic dirit dirit of the strategic dirit of the strategic dirit of the strategic dirit dirit of the strategic dirit dirit of the strategic dirit d



## Qualifications and Background of McPherson & Jacobson, L.L.C.

## **California School Board Association Search Service**

The **California School Board Association** has selected McPherson & Jacobson, L.L.C. to represent them in conducting superintendent searches in California. McPherson & Jacobson is a leading national search firm that has California-based consultants. Our California consultants understand California and its unique requirements and laws.

## **Leading National Search Firm**

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 815 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.** 

## **Nationwide Network of Experienced Consultants**

McPherson & Jacobson has over 110 consultants across the nation. Almost onefourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

## Sustainability in Leadership

Waters and Marzano review of 3.4 million students' achievement scores found that Superintendents' tenure is positively correlated with student achievement.

Organizations using the McPherson & Jacobson protocol have enjoyed sustainability of leadership. Over the last five years, **seventy percent** of administrators are in the position for which they were hired. **Over fifty percent** of administrators are still in the position for which they were hired within the past ten years. **Forty percent** of the administrators selected by governing boards within the past 15 years continue in the position for which they were hired.

## California Searches Conducted by McPherson & Jacobson, L.L.C.

### **Albany Unified School District**

Berkeley, CA 94710 Search Year: 2018/19 Enrollment: 3,714

## **Alisal Union School District**

Salinas, CA 93905 Search Year: 2019/20 Enrollment: 9,000

## **Alisal Union School District**

Salinas, CA 93905 Search Year: 2015/16 Enrollment: 9,000

## **Alpine Union School District**

Alpine, CA 91901 Search Year: 2015/16 Enrollment: 1,700

## **Anderson Union High School District**

Anderson, CA 96007 Search Year: 2018/19 Enrollment: 1,800

## **Benicia Unified School District**

Benicia CA 94510 Search Year: 2014/15 Enrollment: 5,000

### **Beaumont Unified School District**

Beaumont, CA 92223 Search Year: 2020/21 Enrollment: 9,638

## **Brawley Elementary School District**

Brawley, CA 92227 Search Year: 2015/16 Enrollment: 4,000

## **Calexico Unified School District**

Calexico, CA 92231 Search Year: 2017/18 Enrollment: 8,966

## **Cold Spring School District**

Santa Barbara CA 93108 Search Year: 2016/17 Enrollment: 175

## **Conejo Valley Unified School District**

Thousand Oaks CA 91362 Search Year: 2014/15 Enrollment: 19,500

## **Denair Unified School District**

Denair CA 95316 Search Year: 2017/18 Enrollment: 1,500

## **El Monte Union High School District**

El Monte CA 91731 Search Year: 2014/15 Enrollment: 9,500

## **Elk Grove Unified School District** Elk Grove CA 95624 Search Year: 2014/15

Enrollment: 62,000

## **Fallbrook Union High School District**

Fallbrook CA 92028 Search Year: 2018/19 Enrollment: 2,200

## **Fort Sage Unified School District** Herlong CA 96113

Search Year: 2016/17 Enrollment: 180

### **Glendale Unified School District**

Glendale CA 91206 Search Year: 2014/15 Enrollment: 26,200

### **Golden Valley Unified School District**

Madera, CA 93636 Search Year: 2017/18 Enrollment: 1,950

### **Grass Valley School District**

Grass Valley CA 95945 Search Year: 2019/20 Enrollment: 1,500

### **Gustine Unified School District**

Gustine CA 95322 Search Year: 2014/15 Enrollment: 1,830

## Hacienda La Puente

Unified School District City of Industry, CA 91745 Search Year: 2019/20 Enrollment: 22,000

### **Hemet Unified School District**

Hemet, CA 92545 Search Year: 2015/16 Enrollment: 21,000

## Johnstonville Elementary School District

Susanville, CA 96130 Search Year: 2015/16 Enrollment: 205

## Lakeside Union School District

Bakersfield CA 93311 Search Year: 2014/15 Enrollment: 1,310

### Nevada Joint Union High School District Grass Valley, CA 95945 Search Vear: 2017/18

Search Year: 2017/18 Enrollment: 2,600

## New Haven Unified School District

Union City CA 94587 Search Year: 2018/19 Enrollment: 12,148

## **Newark Unified School District**

Newark CA 94560 Search Year: 2019/20 Enrollment: 5,700

### **Newcastle Elementary School District**

Newcastle CA 95658 Search Year: 2014/15 Enrollment: 796

### **Old Adobe Union School District**

Petaluma CA 94954 Search Year: 2019/20 Enrollment: 2,097

### **Old Adobe Union School District**

Petaluma CA 94954 Search Year: 2013/14 Enrollment: 1,700

## **Oxnard Union High School District**

Oxnard CA 93030 Search Year: 2019/20 Enrollment: 16,800

## **Oxnard Union High School District**

Oxnard CA 93030 Search Year: 2015/16 Enrollment: 16,500

### **Parlier Unified School District**

Parlier, CA 93648 Search Year: 2019/20 Enrollment: 3,500

### **Parlier Unified School District**

Parlier, CA 93648 Search Year: 2017/18 Enrollment: 3,435

## Paso Robles Joint Unified School District

Paso Robles CA 93446 Search Year: 2013/14 Enrollment: 6,500

# Penn Valley Union Elementary School District

Penn Valley CA 95946 Search Year: 2014/15 Enrollment: 700

## **Piner-Olivet Union School District**

Santa Rosa CA 95403 Search Year: 2019/20 Enrollment: 1,300

## **Pollock Pines Elementary School District** Pollock Pines CA 95726

Search Year: 2015/16 Enrollment: 800

## **Red Bluff Joint Union**

**High School District** Red Bluff CA 96080 Search Year: 2013/14 Enrollment: 1,622

## **Richland School District**

Shafter, CA 93263 Search Year: 2015/16 Enrollment: 3,504

## **Roseville Joint Union High School District** Roseville, CA 95661

Search Year: 2017/18 Enrollment: 10,300

## Santa Barbara Unified School District

Santa Barbara, CA 93101 Search Year: 2019/20 Enrollment: 15,000

### **Saugus Union School District**

Santa Clarita, CA 91355 Search Year: 2017/18 Enrollment: 10,000

### Sausalito Marin City School District

Marin City CA 94965 Search Year: 2015/16 Enrollment: 524

## Sierra-Plumas Unified School District/ Sierra County Office of Education

Loyalton, CA 96118 Search Year: 2018/19 Enrollment: 386

### **Soledad Unified School District**

Soledad, CA 93960 Search Year: 2016/17 Enrollment: 4,800

### **Sonora Union High School District**

Sonora, CA 95370 Search Year: 2019/20 Enrollment: 1,000

## Strathmore Union Elementary School District Strathmore, CA 93267 Search Year: 2019/20

Enrollment: 773

## **Vallejo City Unified School District** Vallejo, CA 94592 Search Year: 2020/21

Enrollment: 11,500

## Ventura Unified School District Ventura, CA 93001 Search Year: 2016/17 Enrollment: 17,000

### Washington Unified School District

West Sacramento CA 95691 Search Year: 2020/21 Enrollment: 7,460

# Winship-Robbins Elementary School District

Meridian CA 95957 Search Year: 2013/14 Enrollment: 200

# **Consultants for Search**

**Ben Johnson II – Lead Consultant** 

11307 Estates Court Riverside, CA 92503 Email: b\_johnson@macnjake.com Phone: 951-316-9615

### **Educational Background**

B.A.	University of	of California,	Irvine, C	CA Psych	nology
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### **Professional Experience**

	Dates Title Company		Company	y Location	
2017		Present	Regional Care Lead	UCB BioPharma	Smyrna, GA
2014	to	Present	Consultant	McPherson & Jacobson, L.L.C	Omaha, NE
2014	to	2017	Vice-President of Business Development	The Audit Group	
2013	to	2014	Regional Vice- President (Spend & Clinical Management)	Medassets	
2011	to	2013	Director of Healthcare West Regional Sales Manager	Workflow One	Ontario, CA
2010	to	2010	Regional Sales Manager	Pacificord Bio-Tech	Irvine, CA
1997	to	2010	District Sales Manager	Sanofi-Aventis U.S.	Bridgewater, NJ
1995	to	1997	Field Sales Trainer	Sanofi-Aventis U.S.	Bridgewater, NJ
1993	to	1995	Senior Sales/ Institutional Sales	Sanofi-Aventis U.S.	Bridgewater, NJ
1989	to	1993	Sales Representative	Sanofi-Aventis U.S.	Bridgewater, NJ

### Community/Service/Fraternal Organizations

Name of Organization	Dates		S	<b>Offices Held</b>	
Parkview Community Hospital Advisory Committee	2012	to	Present	Member	
Riverside Community Health Foundation	2007	to	Present	Board of Directors	
Alvord Unified School District	1995	to	2017	President Alvord Board of Education	
Sigma Alpha Epsilon Alumni Association	1993	to	Present	Advisory Board	
California Association of Healthcare Purchasing and Material Management				Member	
Western States Healthcare Materials Management Association				Member	
HMFA				Member	
ACHE				Vice-Chairman Inland Empire Chapter	

### **Dr. Darryl Adams**

### 6164 Cameo Street Rancho Cucamonga, California 91701 Email: d\_adams@macnjake.com Phone: (909) 532-9072—cell

### **Educational Background**

Superintendent Certificate	2016	University of Southern California	
Ed.D.	2002	Azusa Pacific University, Azusa, CA	Educational Leadership and Administration
M.Ed.	1996	California State University, Los Angeles, CA	Educational Administration
B.M.E.	1980	University of Memphis	Music Education

### **Professional Experience**

	Dat	tes	Title	District	Location
2019	to	Present	Consultant	McPherson & Jacobson	Omaha, NE
2018	to	Present	Founder & CEO	The Center for Democracy and Education	Rancho Cucamonga, CA
2017	to	Present	Founder & CEO	Motivational Edutainment and Consulting Services	Rancho Cucamonga, CA
2011	to	2016	Superintendent	Coachella Valley Unified School District	Thermal, CA
2010	to	2011	Assistant Superintendent, Human Resources	Coachella Valley Unified School District	Thermal, CA
2007	to	2010	Director, Human Resources	Wm. S. Hart Union High School District	Santa Clarita, CA
2000	to	2006	High School Principal	San Bernardino City Unified School District	San Bernardino, CA

#### **Professional Organization Memberships**

Name of Organization
Association of California School Administrators
Music in Me Foundation International
The Literacy Project Foundation
Invisible Disability Project
United Way of the Desert
California Date Commission

Coachella Valley Economic Partnership JFK Memorial Hospital The Healthy Family Foundation

California Association of African-American Superintendents and Administrators-CAAASA California Association of Latino School Administrators International Society of Technology in Education-ISTE California School Board Association-CSBA Computer using Educators-CUE

### **Offices Held**

Member - 31 years Board of Directors **Board of Directors Board of Directors** Past Board of Directors Past Voting Public Member Past Board of Directors Past Board Member Past Member-Board of Directors Past Member Past Member Past Member Past Member Past Member Past Member

### **Professional Recognition/Awards**

Date	Name of Award	Awarding Organization, Committee, etc.	
2016/17	Superintendent of the Year Finalist	NASS	
2015	One of the Most Influential Voices in Education	Tech and Learning	
2014	Top 100 Innovative Superintendents in the Nation	Obama Administration/U.S. Department of Education -	
1998	Teacher of the Year	Los Angeles County, CA	

## Selected References

### **Albany Unified School District**

1200 Solano Ave. Albany CA 94706 School Phone: 510-558-3750 School District Contact: Julie Sen Board Contact: Kim Trutane 510-525-3261, 510-684-9675 Search Year: 2018/19 Enrollment: 3,714

#### **Alisal Union School District**

155 Bardin Rd Salinas CA 93905 School Phone: 831-753-5700 Board Contact: Fernando Mercado, 831-905-9049 Search Year: 2019/20 Enrollment: 9,000

### **Newark Unified School District**

5715 Musick Ave. Newark CA 94560 School Phone: 510-818-4103 School District Contact: Charlene Aquio, 510-818-4112 Board Contact: Elisa Martinez, 510-220-2171 Search Year: 2019/20 Enrollment: 5,700

## Investment

### The fee for conducting the superintendent search is \$15,900 for Phases I-V.

McPherson & Jacobson has the tools to conduct all or some components of the search process electronically. We can work with the board to determine the best practices as the search progresses to determine if in-person or online meetings will best meet the needs of the district.

### The total not to exceed amount including expenses is \$19,050.\* (online meetings)

Included in the expenses is

- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin
- Two (2) days of online stakeholder meetings
- Two online stakeholder input surveys (in English and one additional language)
- Video interviews for five (5) candidates
- Criminal/financial/credential verification background check for the final candidate
- Office expenses

\*Travel expenses for the consultants to the district are not included in this amount. If the board requests onsite meetings, McPherson & Jacobson estimates travel costs of \$500 per consultant trip to the district. (Travel costs for two (2) consultants.)

### NOTE:

- Expenses may increase if the district chooses additional media advertising.
- Fees and expenses will increase if the district requests additional stakeholder input days.
- Interview expenses for the candidates are not included in the expenses listed.

McPherson & Jacobson is committed to working with the school district until a superintendent is identified and hired. If a second round of candidate selection is necessary, the only cost to the district would be the additional expenses, there is not an additional fee.

### **Additional Services:**

In addition to the basic services provided, McPherson & Jacobson can provide at no additional charge the following services:

- Assist the board in revising and updating the superintendent's job description.
- Assist the board in developing an effective contract.
- Provide assistance in negotiating the contract with the finalist.
- Schedule an on-site visitation to the finalist's home district.

# Price Breakdown for Search Activities

Phase	Description of Services	Fee	Expenses
Ι	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$3,500	\$2,100
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$3,700 \$30	
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$3,700 \$30	
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.		\$350
V	Meet with the board to determine the superintendent performance objectives.	\$1,500 \$10	
Totals	\$15,900 \$3		\$3,150
	Total (excluding travel)*	\$19	,050
	Total (including consultant travel for five (5) trips to the district)	\$21,550	

\*Fees and/or expenses will increase if

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- the board chooses advertising media over \$ 2,000;
- the board requests more than two (2) days of stakeholder input sessions;
- the board requests additional languages for the online stakeholder input survey
- the board requests more than five (5) shortlist candidate videos
- the board requests consultants be present at meetings not included above,
- actual travel costs increase due to changing prices. (only include if travel costs are included above—otherwise erase this bullet point)

## Guarantee

McPherson & Jacobson is committed to working with the school district until a superintendent is identified and hired. If a second round of candidate selection is necessary, the only cost to the district would be the additional expenses, there is not an additional fee.

If the board chooses to use our complete service, we will guarantee our process for two (2) years. If the person selected leaves the position, for whatever reason, within the guarantee period, we will repeat the process at no charge except actual expenses.

We are convinced that our process of identifying your most important selection criteria, meaningfully involving stakeholders, screening candidates against the criteria, and working with you during the critical first year, will ensure your search results in quality leadership for education excellence.

### California Consultants

Dr. Derwin "Darryl" Adams, Educational Consultant, Alta Loma Mrs. Janice Adams, Retired Superintendent, Benicia Mrs. Nicole Anderson, Educational Consultant, Vallejo Mr. James Bates, Retired Superintendent, Bakersfield Ms. Aida Buelna, Retired Superintendent, Woodland Mr. Robert Ferguson, Retired Superintendent, Napa Mr. William Huyett, Retired Superintendent, Lodi Mr. Benjamin "Ben" Johnson II, Former Board Member, Riverside Dr. Barry Kayrell, Retired Superintendent, Murrieta Dr. Debbra Lindo, Retired Superintendent, Escondido Dr. Steven Lowder, Retired Superintendent, Stockton Dr. Michael McCoy, Retired Superintendent, Bakersfield Mr. Jesse Modesto, Retired Administrator, Woodland Dr. Daniel Moirao, Retired Superintendent, Danville Mr. Dennis Murray, Retired Superintendent, Murrieta Dr. Marilyn Shepherd, Retired Superintendent, Friant Mr. Edward Velasquez, Retired Superintendent, Chino Ms. Teri Vigil, Board Member, Falls River Joint Unified School Dist., McArthur Mr. Daniel Zeisler, Retired Superintendent, Chicago Park ESD, Grass Valley Dr. Thomas Jacobson, CEO/Owner, McPherson & Jacobson, L.L.C., Omaha, Nebraska **Dr. Steve Joel, National Recruiter, Superintendent, Lincoln, Nebraska** 

# Transparency—The McPherson & Jacobson Difference

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process. The openness of the process has not gone unnoticed. The following article discusses McPherson & Jacobson's stakeholder involvement.

### Report details what community members want in new Elk Grove district superintendent

Residents, teachers and students in the Elk Grove Unified School District are all looking for the same characteristics in a new superintendent, according to report from McPherson & Jacobson LLC, an executive search firm hired by the district.

They want someone who is collaborative, culturally competent, approachable, has integrity and strong communication skills and is visible at schools. They also want someone who can lobby for legislation, policy and resources at the state and federal level, according to the report.

• • •

The report, compiled from more than 20 meetings with community members and stakeholders, was distributed to board members and others at a school board workshop Wednesday afternoon.

"It's a good process – to get a feel for the community, employees and students," said board President Priscilla Cox.

The report also says that stakeholders are in sync about issues at the district that they would like a new superintendent to know about. They list the achievement gap at the top of their list of concerns, as well as institutional racism and equity in the distribution of resources between schools.

They want the new superintendent to know that there is a split on the school board that makes it difficult for staff to work with trustees and that there is a need to re-establish trust between the administration and staff, according to the report.

The report will be used to help select a superintendent and will be distributed to the candidates so they can understand the community's needs, said Bob Ferguson, a consultant for McPherson and Jacobson LLC. The new superintendent also will receive a copy as a guide to taking the helm of the district.

The process is very effective, said William Huyett, a consultant for McPherson and Jacobson. By the third or fourth meeting, common themes began to emerge.

"It's a healthy thing to talk to your stakeholders and to find out what the issues are," Huyett said.

The school board adjourned to a closed session with the expectation that it would identify finalists for interviews that will begin Friday.

•••

The entire board will conduct formal interviews of candidates in closed sessions. Interviews could continue Monday if the board selects more than four finalists. Representatives of employee, district and community organizations have also been selected to participate in the interviews.

Taken in part from Lambert, Diana, *Sacramento Bee*, Wednesday, Sep. 3, 2014 - 9:30 pm

## What Board Members Say About the Service of McPherson & Jacobson, L.L.C.



Christi Barrett, Ph.D. Superintendent

#### Darrin Watters

Deputy Superintendent Tracy Chambers Assistant Superintendent Derek Jindra, Ed.D. Assistant Superintendent Jennifer Martin, Ed.D. Assistant Superintendent

#### **Professional Development**

Service Center 1791 W. Acacia Avenue Hemet, CA 92545 (951) 765-5100 Fax: (951) 765-5115

Professional Development Academy 2085 W. Acacia Avenue Hemet, CA 92545 (951) 765-5100 Fax: (951) 765-6421

#### **Governing Board**

Stacey Bailey Rob Davis Megan Haley Gene Hikel Vic Scavarda Patrick Searl Ross Valenzuela

#### www.hemetusd.org

f www.facebook.com/hemetunified v twitter.com/HemetUnified August 13, 2020

To Whom It May Concern:

It is my pleasure to write this letter of support for Mr. Ben Johnson. I had the opportunity to work with Mr. Johnson and McPherson and Associates as a candidate for the Superintendent of Hemet Unified School District.

Mr. Johnson provided guidance throughout the application process while working with the District to ensure that the District and I were a good fit. He continued to stay in touch throughout my first year as Superintendent to ensure I had the support needed in my new position.

Mr. Johnson has a kind and caring manner. He is committed to pairing potential candidates with Districts that will grow their skills and expertise as the Superintendent and move the District in a forward direction.

Sincerely,

Christi Barrett

Christi Barrett, Ph.D. Superintendent BOARD OF EDUCATION

Betsy Connolly, D.V.M., President Pat Phelps, Vice President Mike Dunn, Clerk Peggy Buckles, Member John Andersen, Member



SUPERINTENDENT Jeffrey L. Baarstad, Ph.D.

June 3, 2015

To Whom It May Concern:

We have just completed a successful search for our new superintendent with the able assistance of Anita Johnson and Ed Velasquez, our consultants from the search firm McPherson & Jacobson, LLC.

The entire process was handled in a highly professional manner. Every question was answered, every concern addressed. Rather than following a scripted process, the board remained in control of the style and substance of the search but without the burden of its execution. As board president, I worked closely with our consultants and came to depend on them for insight and advice. Their experience, with the search process and with the issues faced by education agencies was invaluable.

We were on a tight timeline and, like many board members, I have a demanding schedule outside of my school board responsibilities. Anita and Ed were available to me in the evening and on weekends when questions and conflicts arose. They did the detail work and planning so that we didn't have to. The level of support and encouragement provided was extraordinary. I cannot imagine doing a search without them.

The number and quality of the applicants was reassuring to the board and spoke to the success of the initial planning process and the skillful execution of our plan. I believe that our consultants represented us enthusiastically to potential candidates, thus helping to develop a high quality candidate pool. Our board constructed a rigorous candidate assessment that no doubt placed additional burdens on our consultants. They didn't waiver or complain. During our post interview discussion of the applicants, our consultants provided insight and guidance without attempting to influence the final outcome. Honestly, with such a difficult and important decision, it was critical to have their advice and support.

That support didn't stop with the selection of a finalist. Anita kept in touch with me, and with our selected candidate, as we worked through the contract development and public announcement process. It is for these reasons, and many more, that I give our consultants and their firm, my enthusiastic endorsement.

www.conejousd.org

Betsy Connolly DVM

Phone: 805.497.9511

info@conejousd.org

org 1400 East Janss Road

Thousand Oaks, CA 91362

### **Comments from Santa Barbara Unified School District**

From: Laura Capps <<u>lcapps@sbunified.org</u>> Date: Wed, Aug 12, 2020 at 1:24 PM Subject: Re: Follow-up To: Ben Johnson <<u>benjohnson2nd@gmail.com</u>>

We are thrilled with the new Superintendent that MacPherson & Jacobson found for us. I thoroughly enjoyed working closely with Ben Johnson. He is especially skilled at helping school boards work together and effectively find consensus -- and that is so important in the final weeks of a high stakes search. I am grateful for their partnership.

From: Wendy Sims-Moten <<u>wsimsmoten@sbunified.org</u>> Date: August 13, 2020 at 12:41:34 PM PDT To: Ben Johnson <<u>benjohnson2nd@gmail.com</u>> Subject: Re: Request

From the very beginning of the search firm selection process I appreciated Ben for really laying a foundation that the Board makes the decision. This was very evident throughout the entire process. Whenever we got stuck or were hesitate [sic] to speak candidly he reminded us the Board makes the decisions. The helped us to trust and own our decision making process. Thank you Ben and company.

Dr. Jacqueline Reid, Santa Barbara Unified School District, CA

"I highly recommend Ben Johnson II and Dr. Daryl Adams of McPherson and Jacobson to any district doing a superintendent search. Throughout the process, Mr. Johnson and Dr. Adams offered us advice that helped us to make better decisions. Overall the service was excellent."

### July 2018

To Whom It May Concern:

Teri Vigil, consultant for McPherson & Jacobson, L.L.C., led our school district in the search for a new district superintendent/principal. It was my pleasure to serve as the point of contact for this endeavor.

I found Teri to be accessible, knowledgeable and professional. But, most of all, I appreciated her sincere caring for our district. Serving, as she does, on the school board of a small, rural district, Teri knows the needs and issues affecting rural districts. She truly understands the need for a special individual to lead such a district.

McPherson and Jacobson enabled our search to cover the United States.

Teri flew the position via McPherson and Jacobson, completed the paper screening of applicants, carried out the reference checks and then presented the school board with a list of possible candidates to be interviewed. Our small, rural district was presented with first-class candidates from which to choose.

Teri also contacted candidates to be interviewed, set up the interviews, provided the list of interview questions to be used and served as the facilitator of the interviews. The list of interview questions used were based on the earlier work completed with stake- holders. These questions were focused on the specific needs and concerns of those stakeholders.

The result of the work done on behalf of our district by McPherson and Jacobson, L.L.C., and most especially by Teri Vigil, has enabled us to put into place a dynamic, accomplished Superintendent/Principal.

It was a pleasure to work with Teri. Her work on behalf of our district gave me peace of mind; I did not have to worry about the quality, or thoroughness, of the superintendent/principal search. Teri always kept the children in the district as the primary focus of this search; she worked to find a candidate who would strive to do the best for the students of Fort Sage Unified School District.

Claire Schumacher Vice President

Fort Sage Unified School District Board of Trustees

## **Attachment Forms**

### NONCOLLUSION DECLARATION TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

Project: Oak Park Unified School District, Superintendent Search

I, Thomas Jacobson, declare that I am the owner/CEOof MC Pherson + Jacobson Listhe party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Company Name Mc Pherson + Jacobson, L.L.C.

Company Address <u>11725</u> Arbor St., Suibe 220, Orraha Signature of Officer <u>June</u> NE 6819 NE 68144

Title Owner/CEO

#### NOTARY FOR NONCOLLUSION DECLARATION

Subscribed and sworn to (or affirmed) before me this Dr day of Alounder, 2020,



[SEAL OF NOTARY]

Signature of Notary

John W. Mint Typed Name of Notary

536-22/6007051.1

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#### NONDISCRIMINATION CERTIFICATION

I am aware of and hereby certify that Contractor shall comply with Section 1735 of the Labor Code, which provides as follows:

No discrimination shall be made in the employment of persons upon public works because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, handicap, medical condition, marital status, or gender of such persons, except as provided in Section 12940 of the Government Code, and every contractor for public works violating this Section is subject to all the penalties imposed for a violation of [Chapter 1 of Part 7, Division 2 of the Labor Code].

By Shin Jan L Signature

Thomas Jacobson Typed or Printed Name

Owner/CEO Title

Nov. 19, 2020 Date

#### WORKERS' COMPENSATION CERTIFICATION

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

(a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.

(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Show Jush

Owner/CEO

Title

Mc Pherson + Jacobson, L.L.C. Company

(In accordance with article 5 (commencing at section 1860), chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under this contract.)

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# Superintendent Search Proposal for



Oak Park Unified School District

December 2, 2020





Introductory Letter	
Letter Addendum, RFP Responses	2a
Executive Summary	
Search Process Plan	4-5
Search Process Flow Chart	6
Samples of Related Materials	7-19
Proposed Timeline	
Cost Proposal	
Sample Contract	
References	
Qualification Statement	
Experience and Qualifications of the Firm	
Qualifications of Lead Consultants	
Qualifications of Supporting Consultants	
Leadership Associates Search List	
Commendations	
RFP Attachments	



### Lead Consultants

Peggy Lynch, Ed.D. (760) 519-8506 plynch@leadershipassociates.org

Fred Van Leuven, Ed.D. (805) 714-1245 <u>fvanleuven@leadershipassociates.org</u>

### Leadership Associates

3905 State Street #7-407 Santa Barbara, CA 93105 www.leadershipassociates.org

Becky Banning Executive Assistant (805) 364-2775 bbanning@leadershipassociates.org



3905 STATE STREET, #7-407 SANTA BARBARA, CALIFORNIA 93105 (805) 364-2775 WWW.LEADERSHIPASSOCIATES.ORG

ERIC ANDREW + KENT BECHLER + MARC ECKER + RICHARD FISCHER + SALLY FRAZER + JUAN GARZA + PEGGY L'NCH + MIKE MILLER + PHL QUON + DENNIS SMITH + RICH THOME + SANDY THORSTENSON + DAVID VERDUGO

SENT VIA EMAIL

December 2, 2020

Oak Park USD Board of Education Oak Park Unified School District 5801 Conifer Street Oak Park, CA 91377

Dear Oak Park Unified School District Board of Education:

Leadership Associates is pleased to submit a proposal to partner with you and your district to select a new superintendent.

Our firm has worked with a wide variety of school districts throughout California since our founding in 1996. Since that time, Leadership Associates has completed more than 550 executive searches, with the majority being superintendent searches, for California school boards. More than 85% of the superintendents selected have remained in their positions for more than five years. We are an executive search firm that focuses its work in California, which has helped us deepen our understanding of the ever-changing California educational landscape.

Our most recent experience incorporates conducting most, if not all, of the phases of a search in a virtual format, given the desires of the Board and the circumstances that exist at the time. We understand the challenges your district may be facing during this time, and we are prepared to adapt our processes and protocols to meet or exceed your specific expectations throughout the entire search.

Our work includes partnering with Boards in several similar and/or nearby districts such as Santa Monica-Malibu USD, Orcutt Union, Santa Maria JUHSD, Santa Clara Unified, Alta Loma SD, Oxnard SD, and Santa Paula USD. Through the continued participation of several of our partners in education organizations such as the California Collaborative for Educational Excellence (CCEE) and the California County Superintendents Educational Services Association (CCSESA), we have remained current on key education policy and system wide developments including Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation. We have a strong record of success in helping districts find superintendents who meet the profile developed by the Board with extensive engagement from staff, parent leaders and community led by Leadership Associates.

Through our years of experience, we have come to understand and respect the uniqueness of each board and district. While there are similarities among districts, we believe that each district has a unique culture that is important to respect and understand. There are many good superintendent candidates but only some will be the right match for your school district. It is our job and our commitment to you to find those candidates that best match your ideals and beliefs as a district. In considering the uniqueness of Oak Park USD, we are aware and respectful of the District's accomplishments and priorities:

- Award Winning Excellence- Significant State and National Recognition
- All schools have earned Gold Ribbon and Blue-Ribbon recognition
- 2019 Exemplary School District recognition
- National Green Ribbon recognition
- Strong projected budget
- Obvious strong support from school community

We would welcome the opportunity to partner with the Board to discuss the search process, including options for staff and community input, an overview of the potential candidate pool, timeline, and the importance of maintaining a confidential process. We also want to obtain from the Board and subsequently from staff, parents and community groups' perspectives on District strengths and challenges as well as the desired qualities and characteristics of the new superintendent. Once this is done, we will prepare a summary report for the Board, develop a position description for Board review, and begin recruiting and vetting candidates who will be an excellent fit for you to choose from to serve as your next superintendent. We have had recent success conducting such meetings remotely via Zoom, Skype and our conference call line.

If our firm is selected, Dr. Fred Van Leuven and I will be the lead consultants actively involved with this search. We are highly proficient in this field and are also former superintendents with many years of experience. In addition, to ensure the widest possible pool of qualified candidates, all partners who are located in various geographical regions of the state will actively support and assist with the search. Profiles of each partner are provided in the Qualification Statement of our proposal. We will use our extensive leadership network at the state and national level to help find the best candidates for this exciting, challenging, and rewarding position.

We look forward to having an opportunity to discuss this proposal with you and address any questions you may have. We realize how important it is for the Board to have a relationship with its search firm that is based on trust and respect. We will be fully committed to you and will provide the Board with high quality candidates who are a good match for the special community that is the Oak Park Unified School District.

Respectfully,

eggyLynch

Peggy Lynch, Ed.D. Lead Consultant Leadership Associates

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Fred Van Leuven, Ed.D. Co-Lead Consultant Leadership Associates

PLEASE NOTE: See attached addendum to locate specific responses to RFP requirements.



### ADDENDUM Leadership Associates Responses to RFP

#### PROPOSAL REQUIREMENTS

- 1. **Detailed description of the process** and all associated costs provided in an itemized format. See Search Process Plan (Pgs 4-6); Cost Proposal, (Pg 21); Sample Contract, (Pg 22)
- 2. Timeline for the process See Timeline (Pg 20)
- 3. Services: See Search Process Plan (Pgs 4-6)
  - 3.1. Assist Board with the development of a hiring profile that is informed by Oak Park USD stakeholders which may include teachers, staff, students, board members and/or community members. See Phases 1-3, (Pg 4)
  - 3.2. Assist Board with local and/or national advertising of the position. See Phase 4, (Pgs 4-5)
  - 3.3. Assist Board with local and/or national recruitment of high-quality applicants that match the established profile. See Phase 4, (Pgs 4-5)
  - 3.4. Assist the Board with facilitation of the applicant screening process. See Phase 5, (Pg 5)
  - 3.5. Assist the Board with facilitation of the interview process. See Phases 6-7, (Pg 5)
  - 3.6. Preliminary background checks including degrees, credentials. See Phase 4, (Pgs 4-5)
  - 3.7. Solicit community input to inform the hiring profile through at least six (6) to eight (8) stakeholder meetings. See Phases 1-2, (Pg 4)
- 4. **Management of a stakeholder interview panel** process to facilitate input into the decisionmaking process. See Search Process Plan, Phase 6, (Pg 5)
- 5. Description of the procedure Consultant will use to **disclose to the District prior** recruiting/searches involving any candidate that is screened. See Phase 5, (Pg 5)
- 6. Samples of related materials See "Related Materials", (Pgs 7-19)
- 7. Experience References:
  - 7.1. Background information about your firm. See Intro Letter (Pgs 1-2); Executive Summary, (Pg 3); Qualification Statement (Pgs 24-28); Previous Searches, (Pgs 29-32)
  - 7.2. Describe searches conducted for school districts and County Offices of Education; include the average length of time the candidates remained on the jobs. See Intro Letter, (Pg 1)
  - 7.3. Provide resumes of key members of the project team, specifically the team leader assigned to facilitate this proposal. See Qualification Statement (Pgs 24-25)
  - 7.4. Provide the names, addresses, phone numbers, and email address of three past or current clients in California who may be contacted to attest to your ability to perform the requested services. See References, (Pg 23)

#### 8. Guarantee:

8.1. What kind of guarantee does your firm provide in the event of an unsuccessful search? See Cost Proposal, Section II, (Pg 21)





### EXECUTIVE SUMMARY

Leadership Associates is a California executive search firm with a national reach that specializes in helping California School Boards find new superintendents. We have done so since 1996 and have assisted with more superintendent searches than any search firm working in California. Our success is based on the following key factors:

- 1. We view each district as unique and therefore work as partners with the Board to develop a customized approach that the Board may use to select its new superintendent.
- Through more than 500 executive searches in California, the majority of these being superintendent searches, we have developed processes that lead to the successful hiring of candidates who meet the profile developed by the Board. These processes include engaging key stakeholders, conducting extensive recruiting and thorough reference checking, and working with the Board throughout the interview and contract approval processes.
- 3. Our partners are all former superintendents with successful leadership experiences in a variety of districts and in state and national organizations. We know the work. And we know who will do it well.
- 4. We understand and respect the factors that contribute to a highly effective governance team. We are committed to helping Board members work collaboratively with each other throughout the various stages of the selection process. Done well, a search will always strengthen the work of the Board and pave the way for a successful superintendent.
- 5. We bring the Board highly qualified candidates. In some respects our job is to make your ultimate decision a difficult one. We are proud of the high quality leaders we have been able to bring forward for Board consideration.
- 6. Our belief is that in order for superintendents to be successful they must have successful leadership experience leading and managing complex organizations. They should know what excellence in curriculum and instruction looks like and be deeply committed to equity. Their behavior must be of the highest integrity and reflect ethical values in their relationships with students, staff, community, and the Board. They must support powerful teaching and learning, build leadership capacity, and strengthen systems and processes that support high levels of achievement for all students.
- 7. We will always provide our best recommendations to the Board including those related to the hiring of specific candidates and the importance of maintaining a high degree of confidentiality so that the best possible candidates come forward.

In conclusion we believe the strengths of our firm are the right match for your district. The superintendent position is one of the most challenging leadership positions in this country. It demands a unique knowledge base and skill set. The new superintendent will need to inspire the confidence of teachers, parents, and community leaders, build on the good work done by so many, but never be afraid to challenge everyone to do better and encourage innovative thinking wherever possible. We are the firm that will help the Board find that leader.





### SEARCH PROCESS PLAN

Leadership Associates has developed criteria to provide the Board of Education with a 9-phase process for selecting its next superintendent. The following is a brief description of each of the key steps of the search process, including identifying key personnel in each phase. The Board's designated administrative support staff will be guided and supported by our highly experienced executive assistant and provided with guidelines, templates, samples, checklists, and personal communication throughout the entire process.

### \*Indicates meetings with the Board

# Phase 1: *\*Initial Meeting with the Board* (Key Personnel: Consultants, Board, LA / district admin support; district I.T. support)

Leadership Associates will confer with the Board upon our selection to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services, including the characteristics the Board is seeking in the next superintendent; District strengths and challenges for the future; the process for engaging groups and individuals in the District and community in the search process; approval of an official timeline and meeting dates; Board and Search Firm protocols during the search; possible contract parameters for the new superintendent; potential internal candidates; the Board's liaison with Leadership Associates and spokesperson for the Board; and all other matters addressed in the RFP Scope of Services which the Board may wish to discuss. We will meet with Board members individually, in person or by phone to learn each member's unique perspective. We will also be prepared to suggest criteria for consideration based on our own professional expertise. Immediately following the initial meeting we will work with district staff to create a Superintendent Search webpage on the district's website where members of the community can receive updates on the search process, including timelines, dates of community engagement opportunities, and access to online surveys.

### Phase 2: Community and Staff Input (Key Personnel: Consultants, LA / district admin. support)

After working with the Board to develop a community engagement plan, we confer with the individuals and groups you request (community, staff, students). We share the search process, timeline, answer questions, and solicit input regarding the desired qualities, characteristics, background, and experiences of the new superintendent, and we discuss the key characteristics of the District's culture, strengths, and future challenges and issues. We spend the time necessary to ensure full input. If individuals are unable to attend the meetings, but would like to provide additional information, or prefer to submit their ideas in a different format, opportunities are provided to contact us via email or telephone. We also have an online survey that can be posted in various languages on the District website to encourage broader participation of staff and community. We prepare a thorough report containing the comments from each group, individuals, and the survey, and send it to Board members approximately one week after the input. We follow up with you after you receive the report to review any questions you have.

### Phase 3: Position Description (Key Personnel: Consultants, LA / district admin. support)

The Position Description will clearly state the criteria which applicants for the position should address in completing their application. It will also reflect input received on qualities and characteristics desired, a description of the District and community, and key search dates. The Board reviews the draft and makes changes before the description is finalized. The description is posted on our website, distributed widely, and can be posted on the District's website.

### Phase 4: Advertising, Recruitment, Reference Checking (Key Personnel: Consultants)

After our sessions with the Board, staff and community, we advertise and actively recruit both statewide and nationally. We will also conduct reference and database checks on all potential candidates. All partners participate in this process in order to take advantage of our extensive state and national



network. These are very critical activities as we work diligently to find the candidates that best match those qualities and characteristics on the Position Description. We verify degrees, credentials and professional experiences. We do extensive confidential reference checking including conversations with people not listed on the candidate's application. We keep the Board informed on a regular basis about the progress of the search.

### Phase 5: \*Selection of Finalists (Key Personnel: Consultants, Board, LA / district admin. support)

At this Closed Session meeting, we will review and discuss all applicants, recommend candidates you should consider interviewing, and explain our rationale for recommending some and not others. We will provide an executive summary on each candidate and will share all available background on any candidates who have applied including whether they have been candidates in any of our searches. The Board, however, makes the final decision on those to be interviewed and determines the interview schedule and location. We offer sample interview questions developed by consultants, and assist the Board in finalizing them with a focus on the specific needs of the District as gleaned from community and staff input and reflected in the position description. In addition to making interview arrangements with the candidates, we provide all the materials the Board needs for the interview, and make logistical arrangements in coordination with the superintendent's assistant or designated district liaison.

### Phase 6: \*Final Interviews (Key Personnel: Consultants, Board, LA / district admin. support)

The Board conducts the interviews in Closed Session with the consultants observing and handling all the logistics. We are present during the interviews and will help facilitate discussions assisting the Board as needed to help you in making your selection of the final candidate. We assist with various follow up steps that need to be completed and inform all candidates of the outcome. We are also experienced facilitating both a closed and open interview process. When convening with Advisory Panels, (open process), the importance of maintaining confidentiality cannot be understated. We will provide guidance to the Board and participants throughout the process and provide a detailed orientation and confidentiality agreement to all paticipants prior to the interviews.

### Phase 7: Validation Process; Contract (Key Personnel: Consultants, Board, LA / district admin. support)

The purpose of the validation process is to confirm the Board's choice prior to the official contract offer. The Board will determine participants for this process. While the consultants will not participate, we will work with the Board and the finalist as needed to develop final parameters for an agreement on the superintendent's contract. We recommend prior discussions with the Board on this topic since it is our intention to recruit candidates who will work within the contract parameters established by the Board.

### Phase 8: Public Approval of Contract (Key Personnel: Consultants, Board, district admin. support)

Following the validation process, the Board takes public action at a regularly scheduled board meeting to employ the new superintendent. Leadership Associates will assist the Board and staff with a communication plan and other activities to support the approval of the new superintendent's contract.

### Phase 9: After the New Superintendent is Signed (Key Personnel: Consultants, New Superintendent)

We provide and review with the new superintendent the Board and community input. We are available to provide additional follow up services as desired. These services could include developing a transition plan and an initial workshop for the governance team to establish goals for the new superintendent, and the superintendent's evaluation process.

**Confidentiality**: Leadership Associates strongly believes the quality of the applicant pool is directly dependent on the confidentiality of the process. Leadership Associates will not divulge the names of interested applicants to any party other than the Board within Closed Session. Reference checks will also be conducted using strategies that will maintain the confidentiality of the process. Throughout the process Leadership Associates will be available to answer any questions you may have.



# SUPERINTENDENT SEARCH PROCESS FLOW CHART

	Note: Blue italicized text indicates Board Participation
	Review search process
Phase 1 Initial Meeting with Board	<ul> <li>Discuss collectively with the Board:         <ul> <li>Characteristics desired in new Superintendent</li> <li>District strengths and challenges</li> <li>Community / staff input process</li> <li>Online survey</li> <li>Search Protocols and Agreements</li> </ul> </li> </ul>
	Finalize timeline
<b>Phase 2</b> Community and Staff Input	<ul> <li>Meet with individuals and groups per Board's request (including individual board members if desired) to solicit input:         <ul> <li>Characteristics desired in new Superintendent</li> <li>District strengths and challenges</li> </ul> </li> <li>Post online survey following Board approval</li> </ul>
	<ul> <li>Present survey results to board members</li> </ul>
<b>Phase 3</b> Position Description	<ul> <li>Develop Position Description using:         <ul> <li>Input received</li> <li>Description of District and community</li> <li>Key search dates / timelines</li> </ul> </li> <li>Board reviews and approves draft</li> <li>Posted on Leadership Associates website, District website, and provided to candidates</li> </ul>
<b>Phase 4</b> Advertising, Recruitment, Reference Checking	<ul> <li>Advertise in trade publication(s)</li> <li>Actively recruit</li> <li>Conduct reference and database checks on all potential candidates</li> <li>Conduct individual interviews with all potential finalists</li> </ul>
<b>Phase 5</b> Selection of Finalists	<ul> <li>Meet with Board to review all applicants</li> <li>Discussion and determination of top candidates</li> <li>Board determines finalists to interview</li> <li>Review interview process and prepare interview questions</li> </ul>
Phase 6 Final Interviews	<ul> <li>Board conducts interviews with assistance from Leadership Associates</li> <li>Board selects finalist</li> <li>Consultants inform all candidates of outcome</li> </ul>
Phases 7, 8 & 9 Validation Process Contract Offer Public Approval of New Superintendent after New Superintendent is Signed	<ul> <li>Board conducts a validation process prior to official contract offer</li> <li>Work with Board and finalist as needed to develop final parameters for contract and to prepare press release</li> <li>Board takes public action at a regularly scheduled meeting to employ new Superintendent</li> <li>Leadership Associates will provide and review Board and Community input with new Superintendent</li> <li>Leadership Associates will provide follow-up services as desired</li> </ul>



### DRAFT ONLINE SURVEY, SUPERINTENDENT SEARCH [DISTRICT NAME] OPEN [MONTH 00 - MONTH 00, 20XX]

INTRODUCTION

The [District Name] Board of Education is asking for your help in selecting our next superintendent. We have requested that the consultants from Leadership Associates, who are assisting the Board with the search, conduct an online survey to solicit input from students, staff, parents, and community.

The following survey asks you to respond to several critical questions. The information generated from this anonymous survey will be used to develop a profile which indicates desired qualities and characteristics in the next superintendent. It will also guide the recruitment and reference checking process as well as development of questions for the interview. The survey also seeks your perspectives on District strengths, challenges, and our community. Consultants will compile a report summarizing survey results and share it with the Board.



### DRAFT ONLINE SURVEY, SUPERINTENDENT SEARCH [DISTRICT NAME] OPEN [MONTH 00 - MONTH 00, 20XX]

### **BACKGROUND INFORMATION**

PLEASE TAKE A MOMENT TO PROVIDE THE FOLLOWING INFORMATION:
1. My perspectives come from being a (check all that apply):
Parent/Guardian
Student
Community Member
Teacher
Classified Employee
Administrator
Certificated, Other
School Volunteer
Public Official
Business Owner / Partner
Non-Profit Staff / Board
Other (please specify)



### DRAFT ONLINE SURVEY, SUPERINTENDENT SEARCH [DISTRICT NAME] OPEN [MONTH 00 - MONTH 00, 20XX]

**DISTRICT STRENGTHS & CHALLENGES; COMMUNITY** 

2. What do you see as the strengths of the District?

3. What do you see as the major challenges which will confront our new superintendent?

4. What is important for our next superintendent to know about our community?

5. Please add any other qualities and characteristics which you think are important for our next superintendent to possess.



### DRAFT ONLINE SURVEY, SUPERINTENDENT SEARCH [DISTRICT NAME] OPEN [MONTH 00 - MONTH 00, 20XX]

6. Please rank, in order of importance between 1 and 7, (1 being the most important), the following professional experiences that you believe are most important for the next superintendent to possess, as they relate to the needs of the District.

Experience of an assistant superintendent or associate superintendent
Experience as an assistant superintendent or associate superintendent
Experience as a superintendent in a comparable district
Experience in oversight of school district finances, budgets, and business management
Experience in management of school facilities
A proven track record of growing academic achievement for all students, including special needs children, second
language learners, and children of poverty

Bilingual



### DRAFT ONLINE SURVEY, SUPERINTENDENT SEARCH [DISTRICT NAME] OPEN [MONTH 00 - MONTH 00, 20XX]

DESIRED PROFESSIONAL LEADERSHIP CHARACTERISTICS

7. Please rank, in order of importance between 1 and 7, (1 the being most important), the following professional leadership characteristics that you believe are most important for the next superintendent to possess, as they relate to the needs of the District.

Is a strong instructional leader who will maintain and improve the student achievement gains made in the District
Will bring the entire community together toward a strong vision of student achievement
Will place the highest priority on safe environments for students and staff
Has strong human relations skills and is a "people person"
Will be accessible to parents and staff
Will be highly visible at our schools and community events
Has the ability to coach and develop potential leaders within the District, and create a strong, cohesive working team



### DRAFT ONLINE SURVEY, SUPERINTENDENT SEARCH [DISTRICT NAME] OPEN [MONTH 00 - MONTH 00, 20XX]

**DESIRED PERSONAL CHARACTERISTICS** 

8. Please rank, in order of importance between 1 and 8, (1 being the most important), the following personal characteristics that you believe are most important for the next superintendent to possess, as they relate to the needs of the District.

Empathetic
Equity-Minded
Consensus Builder
Visible
ii Collaborative
Accountable
Courageous
Visionary

### SAMPLE BOARD UPDATE, COMMUNITY ENGAGEMENT



3905 STATE STREET, #7-407 SANTA BARBARA, CALIFORNIA 93105 (805) 364-2775 WWW.LEADERSHIPASSOCIATES.ORG

#### ERIC ANDREW + KENT BECHLER + MARC ECKER + RICHARD FISCHER + SALLY FRAZER + JUAN GARZA + PEGGY LYNCH + MIKE MILLER + PHIL QUON + DENNS SMITH + RICH THOME + SANDY THORSTENSON + DAVID VERDUGO

### EXECUTIVE SUMMARY Community Engagement Board Update [date]

Dear [District Name] Members:

We are providing you with an Executive Summary of the input received from key stakeholders during our engagement meetings held on [dates]. This also summarizes results from the online survey made available from [date] through [date].

### STAKEHOLDER INPUT SESSIONS

The staff and community meetings were conducted via zoom and were well attended. Everyone was exceedingly passionate and enthusiastic about the qualities desired in the new superintendent, as well as their personal commitment to the District. We conducted [00] individual, small or large group meetings with approximately [000] staff, teachers, parents, students, community, and civic leaders. Our detailed notes of those meetings are attached. Additionally, we received a total number of [00] online survey responses from parents, teachers, staff, students and the community at large. An executive summary of the online survey is also provided below.

A special appreciation is extended to your district office staff and your amazing technology team as all were enormously helpful in assisting us with the organization of the days, preparing schedules and aiding with communication.

We have identified below the most consistent and repeated themes expressed by stakeholders with respect to the personal and professional qualities desired in the new Superintendent, the strengths of the District and those challenges or areas of growth facing the District.

Highlights: Personal Qualities Desired in Superintendent: We desire a Superintendent who...

- 1. Is a leader of great integrity and transparency
- 2. Will trust and empower others
- 3. Will be collaborative and inclusive in decision making
- 4. Will bring a fresh set of eyes, vision and new perspectives to the District
- 5. Will be highly visible and approachable
- 6. Is an effective and articulate communicator
- 7. Will appreciate the unique culture and strengths of the District and our community
- 8. Will be a leader that engenders respect and trust among parents, staff and students

Highlights: Professional Qualities Desired: We desire a Superintendent who...

- 1. Understands the importance of accountability and will hold self and others accountable
- 2. Will build bridges and trust among all stakeholders
- 3. Has a proven track record of success working in a similar district and community
- 4. Has been as a classroom teacher, principal and executive leader, superintendent experience desirable

SAMPLE BOARD UPDATE, COMMUNITY ENGAGEMENT

- 5. Is business-minded with a solid understanding of school finance and special education
- 6. Can handle the very real challenges facing the District and is willing to stand up and be strong to "loud voices" that do not represent the majority
- 7. Is dedicated to equity and social justice and committed to promoting diversity and inclusion
- 8. Is a systems leader who can recognize systems that need to be strengthened with the District

#### **District Strengths:**

- 1. The strong reputation of the District
- 2. Committed and passionate teachers, staff and administrators
- 3. Outstanding programs designed to meet the needs of all students
- 4. The sense of family across the District
- 5. The pride of being a part of the District
- 6. Strong professional development opportunities
- 7. Ability to attract high quality staff

#### District Challenges or Areas of Growth:

- 1. The effective re-opening of schools in light of COVID-19 and the need to address the financial and academic learning loss as a result of COVID-19
- 2. Increasing trust and improving communications with all District stakeholders
- 3. Developing stronger and more collaborative relationships with parents, staff and community
- 4. Balancing the benefits of school autonomy with the need for more consistent implementation of district-wide policies, initiatives and resources
- 5. An expressed desire for greater transparency
- 6. Ensuring greater diversity in the workforce and a commitment to social justice

#### **ONLINE SURVEY**

The online survey was conducted from [dates]. There were a total of xx surveys completed; English: [000], Spanish; [xxx]. Below are the results of the respondents' rankings to the following questions.

The survey respondents were divided into the following categories:

Category:	English	Spanish	Mandarin/Chinese
Parents/Guardian	69.19%	88.80%	84.48%
Student	12.28%	15.20%	17.24%
Community Member	19.07%	19.20%	13.79%
Teacher	23.31%	6.40%	6.90%
Classified Employee	10.41%	7.20%	6.90%
Administrator	3.74%	6.40%	3.45%
Certificated, Other	4.41%	.80%	5.17%
School Volunteer	8.30%	14.40%	5.17%
Public Official	.43%	3.20%	1.72%
Business Owner/Partner	3.28%	3.20%	3.45%
Non-Profit Staff/Board	1.87%	2.40%	1.72%
Other	2.48%	1.60%	1.72%

# When asked to rank in order of importance the <u>Professional Experiences</u> the respondents felt were most important in the next superintendent, the rank order by percentage was as follows:

1. Experience in California Public education either teaching and/or site administration

# SAMPLE BOARD UPDATE, COMMUNITY ENGAGEMENT

- 2. A proven A proven track record of growing academic achievement for all students, including special needs children, second language learners, and children of poverty
- 3. Experience as a superintendent in a comparable district
- 4. Experience in oversight of school district finances, budgets, and business management
- 5. Experience as an assistant superintendent or associate superintendent
- 6. Bilingual
- 7. Experience in management of school facilities

# When asked to rank in order of importance the <u>Professional Leadership Characteristics</u> the respondents felt were most important in the next superintendent, the rank order by percentage was as follows:

- 1. Is a strong instructional leader who will maintain and improve the student achievement gains made
- 2. Will place the highest priority on safe environments for students and staff
- 3. Will bring the entire community together toward a strong vision of student achievement
- 4. Has the ability to coach and develop potential leaders within the District, and create a strong, cohesive working team
- 5. Has strong human relations skills and is a "people person"
- 6. Will be accessible to parents and staff
- 7. Will be highly visible at our schools and community events

# When asked to rank in order of importance the <u>Personal Characteristics</u> the respondents felt was most important in the next superintendent, the rank ordering by percentage was as follows:

- 1. Accountable
- 2. Empathetic
- 3. Visionary
- 4. Equity-minded
- 5. Collaborative
- 6. Courageous
- 7. Visible
- 8. Consensus Builder

We look forward to meeting with you on [date] and discussing the report in more depth and determining with you the next steps in the search process. If you have any questions, please feel free to contact us.

Sincerely,

[consultant name] Consultants, Leadership Associates [consultant name]

Attachments



#### **SAMPLE POSITION DESCRIPTION** Information for Applicants for the Position of

SUPERINTENDENT

**Martinez Unified School District** 

#### THE POSITION

The Board of Education of the Martinez Unified School District is partnering with Leadership Associates to employ a new superintendent to replace our present superintendent who is leaving for a new position. Our next superintendent will build on the successes of the current superintendent and provide the leadership necessary to help the District meet the educational and fiscal challenges presently confronting all California school districts, while continuing the progress that has occurred in achieving our mission and strategic goals. This is an exceptional opportunity to work in a district and community with a long tradition of strong leadership, excellence in teaching and learning, and continued focus on the academic and social/emotional success of all its students. Both the size of the District and community afford the opportunity for the new superintendent to work directly and collaboratively with the Board, staff, students, parents, and community to help all students become college and career ready as a result of their education in a well-managed district that maintains a safe and supportive school culture and learning environment.

#### **PROFESSIONAL PROFILE**

The Martinez Unified School District seeks a superintendent who:

- 1. Has a track record of success in identifying and leading initiatives which improve the achievement of all students in a safe and supportive learning environment
- 2. Has leadership experience at the school and district level which demonstrates the ability to work collaboratively with staff, parents, and community
- 3. Is a strong and effective instructional leader
- 4. Has the ability to manage and lead the different areas of school district operation: curriculum and instruction, finance, human resources, and student support services
- 5. Knows what it takes to build a strong governance team and help the Board meet its legal and fiduciary responsibilities
- 6. Will keep lines of communication open with the Board (no surprises)
- 7. Has experience in helping a district strengthen and sustain local funding sources such as bonds, parcel taxes, foundations
- 8. Has demonstrated the ability to successfully manage large projects and initiatives
- 9. Is knowledgeable of the metrics that staff, leadership, and the Board must use to monitor the District's educational and financial health and make prompt adjustments when needed.
- 10. Has a track record of success in identifying and implementing the educational strategies and actions which address fundamental issues of equity and the academic and social emotional needs of our diverse student population
- 11. Will maintain the focus of everyone's work on the success of all students
- 12. Has the ability to delegate work when needed and monitor the progress being made to achieve intended results
- 13. Will hire and retain a high-quality staff while providing opportunities for continual growth and improvement
- 14. Has demonstrated an effective working relationship with employee organizations
- 15. Will help English Learners and students with special needs achieve the District's academic standards
- 16. Will effectively use the different means of communication available to reach out to our diverse staff, students, parents, and community

#### **PERSONAL PROFILE**

The Martinez Unified School District seeks a superintendent who:

- 1. Has consistently demonstrated the values and behaviors which reflect a high degree of personal integrity and responsibility
- 2. Values collaboration and personal outreach to staff, students, parents, and community
- 3. Has effective communication skills (writing speaking, listening)

#### SAMPLE POSITION DESCRIPTION

- 4. Is committed to reaching out to our larger diverse community and building strong partnerships
- 5. Will inspire and motivate students and staff to do their best work
- 6. Has demonstrated a high degree of social emotional intelligence including humility, empathy, and resilience
- 7. Has a good sense of humor
- 8. Will build upon a culture of respect, honesty and collaboration
- 9. Will seek consensus on important district goals and strategies while encouraging respect for differing points of view
- 10. Values and embraces the diversity of our District and community

#### **SELECTION PROCESS**

The Board of Education has retained the Leadership Associates to partner with the Board in conducting a successful superintendent search process. The team from Leadership will include Consultants Sally Frazier and Jim Brown, and Senior Executive Assistant Becky Banning. The consultants will confer with key stakeholders, recruit candidates, screen applications, and recommend candidates to the Board for interviews and further consideration. The Board will have the opportunity to review all applications submitted. Any contact with board members, in an attempt to influence the selection process, will be considered a breach of professional ethics. Finalists will have an opportunity to familiarize themselves with the community and schools. Board members reserve the right to visit the District and communities of a candidate prior to a final decision.

#### SALARY AND CONTRACT

The salary will be competitive and based upon qualifications and experience. A multi-year contract will be considered.

#### THE DISTRICT

The Martinez Unified School District is located in Martinez, California in Contra Costa County. The District has a student population of approximately 4200 students in Transitional Kindergarten through 12th Grade. Martinez Unified has four elementary schools, a middle, a comprehensive high, an alternative high, and an independent study school. In addition, the District maintains an adult school program and an early intervention preschool program. With a clear district Framework of Focus in place, Martinez Unified is community resources, maintaining safe and supportive schools, and graduating all students prepared for higher education and productive careers.

#### THE COMMUNITY

One of California's first towns, Martinez is home to approximately 37,000 residents. The community has a strong sense of history and family and is a wonderful place to live and work. It is accessible to multiple cultural and recreational activities in the Bay Area and Northern California. The city maintains over 16 parks and acres of open space for use by the community. Martinez is also the Contra Costa County seat, home to three major medical facilities as well as the Shell Refinery, all of which are very supportive of the Martinez schools and students by providing opportunities for student internships, classroom volunteers and financial support in a variety of ways.

#### **APPLICATION REQUIREMENTS**

To be considered, the candidate must provide:

- A fully completed application form
- A letter of application which describes how the candidate meets the expectations in this position description
- Updated resume reflecting relevance of experience to desired qualities and characteristics and reasons for leaving past/current positions
- Three current letters of recommendation
- Five professional references
- Verification of degrees and credentials (Masters degree or higher and appropriate administrative credentials)

All materials will be acknowledged and treated confidentially.

#### SAMPLE POSITION DESCRIPTION

Jonathan Wright, President Kathi McLaughlin, Vice President Jeremie Ginelli, Clerk John Fuller, Member Deidre Siguenza, Member

The Martinez Unified School District is an equal opportunity employer.

#### **APPLICATION PROCESS**

To request application materials for the Martinez Unified School District Superintendent position:

Send an email to Becky Banning, Senior Executive Assistant, at <u>bbanning@leadershipassociates.org</u>.

Applications must be completed and returned via email by 5:00 P.M. on August 21, 2020.

Consultants: Jim Brown, Lead Sally Frazier, Co-Lead

Leadership Associates 3905 State Street, #7-407 Santa Barbara, CA 93105

www.leadershipassociates.org Phone: 805.364.2775

# Superintendent, Martinez Unified School District

SAMPLE ADVERTISEMENT ACSA (EDCAL)

# Leadership Associates

# 🗹 f ⊻ in 🕂 🖾 🗟

The Martinez Unified School District is seeking to hire a Superintendent.

Leadership Associates has been contracted by the District to assist with the recruitment for this position,

For instructions on how to <u>apply please visit this webpage</u> and select the listing for this position. You will receive a response within 24 hours.

For general information, contact:

Becky Banning Office Administrator, Executive Searches Leadership Associates bbanning@leadershipassociates.org

APPLICATION DEADLINE: AUGUST 21, 2020, 5:00 PM

CONSULIANTS: Jim Brown and Sally Frazier

More details about this position, including the position description, timeline and more, may be found by visiting this webpage.

<u>Please do not submit correspondence or application materials</u> for this position via the ACSA Career Center webpage.

More about MUSD.

Internal Number: SuptMUSDBB

Create a Job Alert for Similar Jobs

### About Leadership Associates

As California's Premier Executive Search and Leadership Development Firm Leadership Associates

Applic	cation
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First Name
Last Name
Email
APPLY ON EMPLOYER'S SITE

By using this feature you agree to our Terms and Conditions and Privacy Policy.

# Details

Posted: August 10, 2020

Location: Martinez, California

Show Map

Salary: Competitive Salary

Type: Contract Experienced





#### **PROPOSED TIMELINE**

(Flexible based on Board direction)

#### Oak Park Unified School District Superintendent Search

Note: Blue italicized text indicates Board Participation December 2 District receives proposals DEC 2020 -December 15 Proposal Presentations / Board Awards Contract **JAN 2021** (tentative) January 19, 2021 (tentative) Board confers with consultants and determines characteristics, skills & qualities desired in a new January 19, 2021 superintendent; Board publicly announces timeline and procedures for superintendent selection opens on January 20 **JAN-FEB** Consultants confer with staff and community January 25-29; 2021 designated by the Board to receive input; Online February 1, 2 Phases 1-4 survey is posted to district website Consultants identify potential candidates; Development and posting of recruitment materials and January-February Position Description Advertising and active recruitment; Ad appears in February 8 and 15 EdCal, (Two consecutive publications) February 25, 5:00 PM **Deadline for applications** FEB-MAR Consultants complete comprehensive reference and Mid-March 2021 background checks on applicants Phase 5 Board confers with consultants, reviews all applications March 17 and selects candidates to be interviewed March 24, 25 Board interviews candidates; selects finalist(s) MAR-APR Board completes the validation process of the leading Early Mid-April 2021 candidate and makes final determination Phases 6-8 Board approves superintendent contract at a **regularly** April 20 scheduled board meeting JULY Julv 1 2021 New superintendent begins (as mutually agreed) Phase 9





#### COST PROPOSAL AND GUARANTEE

#### OAK PARK UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH

#### I. TOTAL FEE TO CONDUCT SEARCH: \$23,500 (all-inclusive)

This fee includes:

- All expenses incurred by consultants
- All consultations with the Board
- Development and posting of the position description announcing the position
- Cost of advertising in EdCal (Two consecutive publications)
- Acceptance of applications and responding to all inquiries regarding the position
- Recruitment of candidates and extensive background checks
- Gathering of community and staff input and providing Board with a written report, including online survey
- Coordination of logistics of the search:
  - o scheduling appointments
  - o notification of unsuccessful candidates
  - o scheduling community visit
- Assisting in the development of interview questions and supporting the Board with the interview process
- Assisting the Board's administrative assistant throughout the process with templates, checklists, online posting updates and sample agenda language
- Acting as an advisor to the Board of Education
- Assisting the new superintendent and Board through transition and community verification process, if conducted

#### II. GUARANTEE

 Should the new superintendent leave within up to two years, Leadership Associates will conduct a new search at no cost except for travel and advertising expenses, provided the Board majority remains the same.



# 

#### SAMPLE CONTRACT

LEADERSHIP ASSOCIATES www.leadershipassociates.org 3905 State Street #7-407 Santa Barbara, CA 93105 (805) 364-2775

#### AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **19<sup>th</sup> day of January 2021** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **OAK PARK UNIFIED SCHOOL DISTRICT**, hereinafter called the District.

The Contractor agrees to perform services for the District as follows:

#### The Contractor will conduct a Superintendent search, as delineated in the attached Proposal.

The District agrees to pay the Contractor **TWENTY-THREE THOUSAND**, **FIVE HUNDRED DOLLARS (\$23,500)** for services provided. Payment is to take place in two increments: (1) \$11,750 upon completion of stakeholder input, and (2), \$11,750 upon selection of a finalist. The Contractor will submit invoices to the District for each of the payment increments. Payments are due within 30 days of receipt of invoice.

#### Remittance payable/forwarded to: Leadership Associates

#### Attn: Linda Hunt 50-855 Washington Street #C-205 La Quinta, CA 92253

The Contractor is to perform the above services beginning January\_\_\_\_\_, 2021.

Contractor agrees to hold harmless and indemnify the District, its officers, agents, and employees with respect to all damages, costs, expenses or claims, in law or in equity, arising or asserted because of injuries to or death of person or damage to, destruction, loss, or theft of property arising out of faulty performance of the services to be performed by Contractor hereunder.

It is expressly understood and agreed to by both parties hereto that the Contractor, while engaged in carrying out and complying with any of the terms and conditions of this contract, is an independent contractor and is not an officer, agent, or employee of the aforesaid District. Either party may terminate this agreement by providing the other party with ten (10) days written notice. Upon such termination, fees will be determined on a pro rata basis.

Leadership Associates does not participate in a California public pension system. Leadership Associates and the District understand that the work/services provided should not be considered creditable toward the STRS earnings limit as the work is not normally performed by employees of the District and requires less than 24 months (496 business days). REF. CA Education Code § 26135.7 (2014)

CONTRACTOR: LEADERSHIP ASSOCIATES Taxpayer ID#: 68-0383653	DISTRICT: OAK PARK UNIFIED SCHOOL DISTRICT		
By:	Ву:		
Name: <u>Peggy Lynch, Ed.D.</u>	Name:		
Title: Lead Consultant	Title:		
Date:	Date:		





#### OAK PARK UNIFIED SCHOOL DISTRICT Superintendent Search

DISTRICT		CONTACT NAME	TITLE	PHONE	EMAIL
1	<b>Alta Loma SD</b> 9390 Base Line Road Alta Loma, CA 91701	Rebecca Davies	Board President	(909) 484-5151 ext.102003	<u>rdavies@alsd.org</u>
2	<b>Orcutt Union SD</b> 500 Dyer Street, Orcutt, CA 93455	Liz Phillips	Board President	(805) 938-8907	<u>Iphillips@orcutt-schools.net</u>
3	<b>Santa Maria JUHSD</b> 2560 Skyway Drive Santa Maria, CA93455	Dominic Palera	Board President (at time of search)	(805) 922-4573	4nickp@verizon.net
4	<b>Santa Clara USD</b> 1889 Lawrence Road Santa Clara, CA 95051	Michelle Ryan	Board President	(408) 673-1620	<u>mryan@scusd.net</u>
5	<b>Santa Monica-Malibu USD</b> 1651 16th Street Santa Monica, CA 90404	Laurie Lieberman	Board President (at time of search)	(310) 387-5846	<u>llieberman@smmusd.org</u>





#### **QUALIFICATION STATEMENT**

#### EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 550 executive searches in California since 1996. We have 14 partners and associates, all active educators and former, successful California superintendents who reside throughout the state – north, south, and central valley. While we are dedicated to California school districts, we have networks throughout the country and have assisted many school boards in finding top candidates from outside the state.

A few other facts about the partners of the firm:

- All keep superintendent searches as their core work
- All have national and state-wide networks and alliances including Council of the Great City Schools; Urban Education Dialogue (UED); Association of California School Administrators (ACSA); California Association of Latino Superintendents and Administrators (CALSA); California Association of African-American School Administrators (CAAASA); California Collaborative for District Reform; (CCDR); American Association of School Administrators (AASA); Suburban School Superintendents; and California City School Superintendents
- All belong to organizations which include top and emerging leaders
- Three were California State Superintendent of the Year
- Three chaired ACSA's California state superintendent's committee; two were ACSA presidents
- A number are bi-lingual in Spanish
- Many facilitate workshops in districts throughout the state: board/superintendent relations; board/superintendent protocols; strategic planning; superintendent evaluations; team building; and instructional improvement. Several coach and mentor superintendents and other top district leaders
- Most have taught or are currently teaching leadership courses at universities
- All have received awards for educational and community work, regionally, statewide, and nationally; and one was honored by the Mexican Consulate
- Partners have authored or co-authored the following publications; A Practical Guide to Effective School Board Meetings; Eight at the Top; Superintendent-School Board Practices; and The Superintendent's Planner
- Distict/Board Executive Assistant and administrative staff receive ongoing support and guidance from highly-qualified personnel with parallel district office experience

#### **QUALIFICATIONS OF LEAD CONSULTANTS**

#### Peggy Lynch, Ed.D. – Partner

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of more than 60 executive searches. She received her doctorate from the University of La Verne, her Master's Degree from Fullerton and her Bachelor's Degree from Parsons College in Iowa. Peggy chaired the ACSA Orange County and San Diego County Superintendents, was chair of the ACSA Superintendents' Symposium and ACSA's State Annual Conference. Peggy has received recognition from various organizations, including Southern California Women in Educational Management, Stanford University School of Engineering and the PTA. She has also co-authored several books, including *Effective* 



Superintendent-School Board Practices; The Superintendent's Planner, A Monthly Guide and Reflective Journal; and Eight at the Top: A View Inside Public Education.

#### Fred Van Leuven, Ed.D. – Associate

Fred served as President of Accrediting Commission for Schools of the Western Association of Schools and Colleges, (ACS WASC) for the San Francisco Bay Area from 2013 through 2018. He has served as the School Assistance Intervention Team Lead for Roosevelt High School in Fresno Unified and DAIT Team Member in Palmdale Elementary School District. He has assisted school boards, school districts and schools throughout California, Hawaii and Guam in a variety of key areas. He served as Superintendent of Santa Ynez Valley Union High School District for 12 years beginning in 1996, after three years as Director of Secondary Education for the Conejo Valley Unified School District, and retired in 2008. He also served as teacher and administrator for 13 years in the Saddleback Valley Unified School District and four years as Poway High School Principal in San Diego County. Fred is a graduate of the University of Southern California and holds a Doctorate in Education.

#### Becky Banning – Lead Executive Assistant

Becky has served in high-level clerical and bilingual executive assistant roles in public education and the non-profit sector for over 30 years. In addition to supporting school site personnel and district cabinet-level administrators, Becky has served as the Executive Assistant to three superintendents in San Dieguito Union High School District (San Diego County), a Superintendent of Cold Spring School District (Santa Barbara County) and the President/CEO of Music Academy of the West (also in Santa Barbara). She has been the lead Executive Assistant for Leadership Associates since the fall of 2016.

#### **QUALIFICATIONS OF SUPPORTING CONSULTANTS**

#### Eric D. Andrew, Ed.D. - Partner

Dr. Andrew began his education career in 1979 as a teacher in Claremont Unified School District, where he taught students in kindergarten through sixth grade, and later became a site principal for elementary, middle and high school levels. Dr. Andrew served as Director of Student Services in Redlands Unified School District, served as an Assistant Superintendent of Educational Services in Glendora Unified School District, and later became Superintendent of the Campbell Union School District, a position he held for seven and a half years. Dr. Andrew is currently the President of the Region 8 Retiree Charter, a Region 8 Executive Consultant, and is on board California Association of African American School Administrators (CAAASA) and Santa Clara County Alliance of Black Educators (SCCABE). He also serves as an active member of the California Association of Latino School Administrators (CALSA). As a well-respected equity-focused administrator and instructional leader, he has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year (2017). Dr. Andrew has been recognized by the Association of California School Administrators (ACSA) as the Region 8 Superintendent of the Year (2014), the State and Region 15 Central Office Administrator of the Year (2009), and the Region 12 Pupil Services Administrator of the Year award (2005). He holds a master's in education from Cal-Poly, Pomona, an administrative credential from Cal State San Bernardino and a doctorate in education from the University of LaVerne.

#### Kent L. Bechler, Ph.D. – Partner, Leadership & Organizational Development

Kent served as superintendent of the Corona-Norco Unified School District, the 9<sup>th</sup> largest school district in California until his retirement in 2012. The district was named a 2012 finalist for the \$1 million Broad Prize for Urban Education. He also served as superintendent in Walnut Valley Unified and Duarte Unified School Districts. Kent received a Bachelor's Degree in social work from Azusa Pacific University, a Master's Degree in educational administration from California State University, Los Angeles and a Ph.D. in education from Claremont Graduate University. Kent has extensive training experience in management, leadership, systems, policies and procedures, strategic planning, labor relations, and developing collaboration and teamwork within organizations. His academic work includes teaching adjunct classes at the university level and consulting with educational institutions, businesses and other organizations. During Kent's 32 year career in K-12 education, he served in professional organizations including

Association of California School Administrators (ACSA), California Collaborative on District Reform, American Association of School Administrators (AASA), Southern California Superintendents, Urban Education Dialogue and Educational Research Development Institute (ERDI).

#### Tom Changnon – Associate

Tom served as Stanislaus County Superintendent of Schools from 2007-2019. In his 12 years in office, Tom championed Civics Education, Character Development, Parent Involvement and Career Technical Education (CTE) programs. He earned his BA degree from Stanford University, Master Degree(s) in School Administration (St. Mary's, USF), and Teaching Certifications from College of Notre Dame. Tom has over 40 years of education experience at the elementary, middle, and high school levels. He also served as Assistant Superintendent and Superintendent prior to his election as the County Superintendent. Tom is an active member of the Association of California School Administrators (ACSA) serving on many local, regional and state committees including ACSA's Small School District Committee. Tom has received a number of awards, including being selected twice for the Bill Ullom Award and twice a recipient as the regional Superintendent of the Year award. In 2018 he received the Chamber Lifetime Citizen Achievement Award.

#### Marc A. Ecker, Ph.D. - Partner, Chief Financial Officer

Marc retired in December, 2014 as Superintendent of the Fountain Valley School District for 18 ½ years in that position. He served as Chair of the Orange County Special Education Alliance and is a past president of the Orange County Superintendents' Organization. Marc is a past State President of the Association of California School Administrators (ACSA). He served with other leading superintendents in providing input and advice on the development of the Local Control Funding Formula to the Governor and his staff. He also served on the State Public Schools Accountability Act Advisory Committee and two terms on the Financial Crisis Management Assistance Team Advisory Board. Marc is the financial officer for the California League of Schools and served as president of the ACSA mentor program and is currently the chairperson of the Schools First Federal Credit Union Board of Directors. Marc received his Bachelor's Degree from UCLA, his Master's Degree from California State University, Fullerton and his Doctorate from Alliant University. He is currently the Chief Financial Officer for the firm.

#### **Richard Fischer – Partner**

Rich served as Superintendent of Schools for 19 years in the Mountain View Los Altos Union High School District, Lake Tahoe Unified School District and the Harmony Union School District. He currently serves as Director of the Executive Leadership Center and is also a member of the El Dorado County Board of Education. Rich has been Director for the ACSA Superintendents' Academy and presenter and trainer for California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendents' Symposium, El Dorado County Instructional Leaders - Series on Effective Leadership Techniques, Leadership Mountain View, and California School Leadership Academy. He has been honored as ACSA Regions 1,2,3 Superintendent of the Year and Administrator of the year as well as being named Los Altan of the Year in 2006. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Northridge and his Master's Degree from California State University, Northridge and his Master's Degree from California State University, Northridge and his Master's Degree from California State University.

#### Sally Frazier, Ed.D. – Partner, Member at Large

Sally was elected Madera County Superintendent of Schools for six consecutive 4-year terms. She received her Doctorate from University of Southern California, and her Master's and Bachelor's degrees from California State University, Stanislaus. Sally served the California County Superintendents' Educational Services Association as President, Legislative Chairperson and numerous terms on its Executive Board. She was CCSESA's representative to ACSA's Superintendents Committee and its liaison to the Springboard Schools Board of Directors. Sally chaired CCSESA's Commission on the Organization of Policy Groups, Organizing for Action. Sally was appointed by former State Superintendent of Public Instruction, Delaine Eastin, to the Education Commission for Technology in Learning. Sally was also appointed by Governor Schwarzenegger to the Advisory Commission on Juvenile Justice and Delinquency.



#### Juan Garza – Partner

Juan has been a superintendent for 15 years in Kings Canyon Unified School District, a district that has 22 schools. He has worked 27 years in the district that serves Reedley, Orange Cove and the communities of Navelencia, Squaw Valley, Dunlap and Miramonte. He was inducted into the Reedley Chamber of Commerce Hall of Fame, has been awarded Administrator of the Year, and has been a featured keynote speaker in various workshops on topics such as *Building Effective Governance Teams*, and *Working With the Members of your Rural Communities*, sponsored by Lozano Smith. Mr. Garza is also an active member of the California Association of Latino Superintendents and Administrators, (CALSA), where he has presented as part of a panel featured in CALSA workshops.

#### Phil Quon – Partner

Phil served as Superintendent for 19 years in the Bay Area – 13 years at Union School District in San José and the last six years in Cupertino Union School District. He served as the President of the statewide ACSA Superintendents Council, the Chair of the ACSA Superintendents' Symposium, and the President of the California City School Superintendents. He also served on the American Association of School Administrators (AASA) Governing Board and on the CSBA Annual Education Conference Planning Committee and Education Legal Alliance Advisory Group. He has been the Director of the ACSA Superintendents Academy as well as a presenter in the ACSA "Leading the Leaders" Program for newly appointed superintendents in California. He has chaired numerous WASC accreditation teams in California and Hawaii. Phil was a member of the CTC Teaching Mathematics Advisory Panel and a contributor to the National Journal Online Education Blog. Phil received his Bachelor's Degree in Mathematics from UCLA and his Master's Degree in Education Administration from CSULA.

#### Dennis M. Smith, Ed.D. – Partner, Search Lead

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (27,000 ADA) in Orange County until his retirement in June 2012. He also served as superintendent of the Orange County Public Schools in Orlando, Florida, the 16th largest school district in the United States. Prior to that, he served as superintendent of the Irvine Unified, Cajon Valley Union and Laguna Beach Unified School Districts. Dennis served a total of 26 years as a Superintendent of Schools. Dennis has experience conducting executive searches since 2005, and has facilitated or assisted in the facilitation of more than 70 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as President of the Southern California Superintendents' Association. Dennis received his Bachelor of Arts and Master's Degree from Arizona State University and his Doctorate from the University of Arizona. In addition, he has been an adjunct faculty member at California State University, Fullerton. Dennis has spoken at the local, state and national level on Board-Superintendent relations, Strategic Planning and Goal Setting and Organizational Management. He has consulted with school districts across the United States assisting school boards with superintendent searches and conducting workshops, trainings and organizational efficiency audits.

#### **Rich Thome – Partner**

Rich Thome has conducted over 101 executive searches and 154 Board Workshops since 2003. Rich joined Leadership Associates in 2006. Prior to joining Leadership Associates, he also served as Director, Professional Learning in the Mobile Technology Learning Center (MTLC), a research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. Prior to that assignment, he served as Director Educational Leadership Development Center at the University. In addition, Rich was an Executive Coach for Pivot Learning Partners in Los Angeles and San Diego Counties. His prior work included serving as Superintendent of the South Bay Union and Cardiff School Districts, Assistant Superintendent of Human Resources and Technology, and Superintendent Search Consultant for the San Diego County Office of Education. He also worked for 23 years as Teacher, Principal, Coordinator, Director and Assistant superintendent in the Capistrano Unified School District. Rich recently served on the University of San Diego School of Leadership and Education Sciences Advisory Board and on the



Classroom of the Future Foundation Board of Directors. He received his Bachelor's degree from CSU, Los Angeles, and his Master's from Pepperdine University. Rich is Latino, is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich was awarded the prestigious Ohtli Award in 2008 for his 40 years of services to the Latino Community. In 2007 he was awarded the Excellence in Leadership Award by the University of California, San Diego, and in 2006, the Willie Velasquez Community Service Award. He is also a recipient of the Honorary Service Award from the California Congress of Parents, Teachers and Students; and the Orange County Hispanic Educator of the Year Award.

#### Sandy Sanchez Thorstenson – Partner

Sandy Sanchez Thorstenson served as the Superintendent of the Whittier Union High School District for fifteen years having spent her entire 39-year career in Whittier Union. Prior to becoming Superintendent, Mrs. Thorstenson served as Assistant Superintendent, Educational Services, High School Principal, Assistant Principal and Teacher. The Whittier Union High School District, a minority-majority high school district with a student enrollment comprised of eighty-six percent Latino and sixty-nine percent socio-economically disadvantaged students, has demonstrated remarkable gains in student achievement at every school, in multiple indicators and over time. Most importantly, Whittier Union has narrowed the achievement gap from 35% to 9% and has proven on behalf of their students that demographics do not determine destiny. The Association of California School Administrators selected Mrs. Thorstenson as California's 2016 recipient of the Marcus Foster Administrator Excellence Award and its 2012 California Superintendent of the Year for AASA. She was selected as ACSA's Region XV Superintendent of the Year for 2007. Sandra Thorstenson served as president of ACSA's State Superintendency Council, president of California City School Superintendents Association, and was a member of Southern California Superintendents' Association and Urban Education Dialogue. She also served on the board for Pivot Learning Partners and the board of directors for the Whittier Chamber of Commerce. Mrs. Thorstenson was appointed by Governor Brown as the superintendent representative of the five-member board of the California Collaborative for Educational Excellence and served as chair helping to launch the state agency focused on providing support and assistance to school districts throughout California. She is a member of the California Collaborative for District Reform and currently serves on the board of directors of the Soroptimist International of Whittier.

#### David J. Verdugo, Ed.D. – Partner

David served as Superintendent for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA, Director of Secondary Education, Principal at both Elementary and High School levels, teacher, and coach. He has a total of 43 years in the field of education spanning Grades K-12. His duties have included school facility management, extensive involvement with budget development, implementation of technology programs, employer/employee relations, curriculum and instructional strategies, and organizational development. His experience includes serving students of diverse populations and socioeconomic levels in urban and suburban settings. He was named the Association of California Administrators (ACSA) Region XIV Superintendent of the Year; received the California State University, Long Beach Outstanding Superintendent Leadership Award in 2012; the ALAS, Association of Latino Administrators and Superintendents; National Outstanding Educator Award in 2013; and, in 2020, was inducted into the University of Southern California USC Rossier School of Education "Hall of Fame", making him only the 23rd recipient of this prestigious award. He earned his Bachelor's Degree from Whitworth College in Spokane, Washington and his Master's Degree from the University of La Verne. His Doctoral Degree in Educational Administration was earned at the University of Southern California. Dr. Verdugo is a past Governing Board member to AASA and has addressed and spoken on State and National topics from building a case for reform to the importance of Arts in schools. He was the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) until 2019, as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.





# EXECUTIVE SEARCHES 2013-CURRENT

#### **STATEWIDE**

Association of California School Administrators (ACSA) **Executive Director** California Collaborative for Educational Excellence (CCEE) California County Superintendents Educational Services Association (CCSESA) Executive Director WestEd/GATES

#### COUNTY OFFICE OF EDUCATION SUPERINTENDENT

Los Angeles County – 2011 Santa Clara County – 2008 Executive Director **Executive Director** 

> 1,500,000+ ADA 275,000+ ADA

#### SCHOOL DISTRICT SUPERINTENDENT (2013-Current)

<u>District</u>	<u>County</u>	ADA
Fresno USD	Fresno	73,356
San Francisco USD	San Francisco	58,865
Santa Ana USD	Orange	57,410
Capistrano USD	Orange	53,833
Corona-Norco USD	Riverside	53,148
Sacramento City USD	Sacramento	47,616
Oakland USD	Alameda	46,486
Riverside USD	Riverside	42,560
Stockton USD	San Joaquin	40,984
Fontana USD	San Bernardino	40,374
San Jose USD	Santa Clara	32,938
Anaheim Union HSD	Orange	32,085
San Ramon Valley USD	Contra Costa	31,900
Mt. Diablo USD	Contra Costa	31,013
West Contra Costa USD	Contra Costa	30,596
Bakersfield City SD	Kern	30,262
Modesto City Schools	Stanislaus	30,718
Orange USD	Orange	28,522
Saddleback Valley USD	Orange	27,803
Rialto USD	San Bernardino	26,468
Placentia-Yorba Linda USD	Orange	25,821
Palm Springs USD	Riverside	23,332
Lake Elsinore USD	Riverside	22,000
Hemet USD	Riverside	21,977
Pajaro Valley USD	Santa Cruz	20,438
Folsom-Cordova USD	Sacramento	19,865
Anaheim City SD	Orange	19,312
Alvord USD	Riverside	19,255
Coachella Valley USD	Riverside	18,861
Riverbank USD	Stanislaus	18,750
Antioch USD	Contra Costa	18,352
Panama-Buena Vista Union SD	Kern	18,250
Ventura USD	Ventura	17,430
Santa Rosa City Schools	Sonoma	16,700
Oxnard SD	Ventura	16,533
Burbank USD	Los Angeles	16,207
Cajon Valley Union SD	San Diergo	16059
Paramount USD	Los Angeles	15,681
Santa Clara USD	Santa Clara	15,509
Walnut Valley USD	Los Angeles	14,658
Vallejo City USD	Solano	14,554
West Covina USD	Los Angeles	14,402
Fullerton SD	Orange	13,661
Vacaville USD	Solano	12,561
Inglewood USD	Los Angeles	12,570
San Dieguito UHSD	San Diego	12,485

<u>District</u>
Palo Alto USD
Natomas USD
Metropolitan Education
Oak Grove SD
Upland USD
Victor ESD
San Lorenzo USD
Evergreen School District
Alameda USD
Franklin-McKinley SD
Merced City USD
Lucia Mar ÚSD
Pittsburg USD
Azusa USD
Berkeley USD
Dublin ÚSD
Roseville City ESD
Los Alamitos USD
YucaipaCalimesa Joint USD
Ocean View SD
Westminster SD
Santa Maria JUHSD
East Whittier City ESD
Davis Jt. USD
San Mateo Union HSD
Novato USD
South Bay UESD
San Rafael City Schools
Santa Cruz City Schools
Newhall SD
Fountain Valley USD
Newark USD
Ukiah USD
Brea Olinda USD
Alta Loma SD
Santa Paula USD
Orcutt Union ESD
Oakley Union SD
Buena Park SD
Moreland SD
Charter Oak USD
Sonoma Valley USD
San Lorenzo Valley USD
Belmont-Redwood Shores SD
Wiseburn USD
Ravenswood City SD
Paradise USD
Duarte USD
Lindsay USD
Central UHSD
Cypress SD
Brawley ESD
Eureka City Schools
Lake Tahoe USD
Hanford Joint Union HSD
Amador County USD
Lemon Grove SD
Mountain View-Los Altos UHSD
Goleta Union SD
Del Norte County USD
Cabrillo USD
Cambrian SD

<u>County</u>	<u>ADA</u>
Santa Clara	12,357
Sacramento	12,300
San Jose	12,000
Santa Clara	11,800
San Bernardino	11,665
San Bernardino	11,531
Alameda	11,530
Santa Clara	11,385
Alameda	11,299
Santa Clara	11,269
Merced	11,009
San Luis Obispo	10,710
Contra Costa	10,560
Los Angeles	10,518
Alameda	
	10,340
Alameda	10,000
Placer	9,943
Orange	9,833
San Bernardino	9,655
Orange	9,461
Orange	9,264
Santa Barbara	7,633
Los Angeles	8,829
Yolo	8,626
San Mateo	8,163
Marin	8,078
San Diego	7,682
Marin	7,200
Santa Cruz	7,092
Santa Clarita	6,831
Orange	6,337
Alameda	6,294
Mendocino	6,214
Orange	5,973
San Bernardino	5,900
Ventura	5,454
Santa Barbara	5,087
Contra Costa	4,871
Orange	4,684
Santa Clara	4,670
Los Angeles	4,581
Sonoma	4,564
Santa Cruz	4,444
San Mateo	4,308
Los Angeles	4,301
San Mateo	4,296
Butte	4,261
Los Angeles	4,247
Tulare	4,150
Imperial	4,104
Orange	4,000
Imperial	3,980
Humboldt	3,884
El Dorado	3,872
Kings	3,802
Amador	3,802
San Diego	3,027
-	
Santa Clara	3,753
Santa Barbara	3,718
Del Norte	3,591
San Mateo	3,357
Santa Clara	3,349

District Pacifica SD San Marino USD Mill Valley Elementary SD Exeter Public Schools Standard ESD South Whittier ESD San Bruno Park ESD Oroville City ESD Castaic Union SD Fowler USD Scotts Valley USD Jefferson SD Carmel USD Bear Valley USD Galt JUHSD Lammersville JUSD Woodlake USD Red Bluff Union ESD Plumas USD Fort Bragg USD Willits USD Mariposa County USD Byron Union SD Reed Union SD Larkspur-Corte Madera SD Colusa USD Jas Lomitas ESD Sierra USD Wilsona SD St. Helena USD Guadalupe Union SD Fall River JUSD Kentfield SD Taft UHSD University Preparatory School Bass Lake JUSD Wheatland UHSD Rancho Santa Fe SD Emery USD Summerville UHSD Calaveras COE
Rancho Santa Fe SD Emery USD Summerville UHSD

County San Mateo Los Angeles Marin Tulare Kern Los Angeles San Mateo Butte Los Angeles Fresno Santa Cruz San Joaquin Monterey San Bernardino Sacramento Sar Joaquin Tulare Tehama Plumas Mendocino Mendocino Mariposa Contra Costa Marin Marin Colusa San Mateo Fresno Los Angeles Napa Santa Barbara Shasta Marin Kern Shasta Marin Kern Shasta Madera Lassen San Joaquin Yuba San Diego Alameda Tuolumne Calavera Mono Merced Tulare	ADA 3,150 3,146 3,086 3,000 2,979 2,918 2,785 2,696 2,568 2,562 2,482 2,477 2,468 2,473 2,287 2,200 2,192 2,178 2,130 1,917 1,907 1,816 1,686 1,556 1,523 1,450 1,336 1,323 1,315 1,295 1,280 1,209 1,177 1,045 9,00 8,91 8,25 7,70 7,39 7,00 6,87 6,24 4,50 4,17 4,01 4,76 3,67 4,77 4,68 4,77 4,68 4,5566 4,5566 4,566

#### **EXECUTIVE DIRECTOR/DIRECTOR**

Baldy View ROP Birmingham Community Charter HS East San Gabriel Valley SELPA Oxford Preparatory Academy San Ramon Valley SELPA So Orange County SELPA San Bernardino Los Angeles Los Angeles Orange Contra Costa Orange





### COMMENDATIONS FROM BOARD MEMBERS

**Mt. Pleasant ESD:** At every step of the way we found the services of the staff at Leadership Associates to be responsive to the specific needs of our district and the rapidly changing circumstances surrounding the [COVID-19] crisis. I highly recommend the services of Leadership Associates and specifically Eric Andrew and David Verdugo.

**CCSESA:** It was a pleasure to have your outstanding team provide such an important service to this process! This is a critical position and your team did a superb job in helping to ensure the process was collaborative, transparent and resulted in a selection of a top notch person!"

Lucia Mar USD: Thank you to Leadership Associates, especially Phil Quon and Fred Van Leuven, for leading our district through a professional and successful superintendent search. Your pre-search activities, outreach, screening, organization of materials and leadership was outstanding. We found our new superintendent and are confident we found a perfect fit."

**Fresno USD:** Thank you to Leadership Associates for all your assistance in the process. As you know, only two of us were on the Board the last time a Superintendent was hired and at that time, there was no search process. It was invaluable to have the assistance of a team that has experience in the selection of a Superintendent.

**Wiseburn SD:** Thank you for your thoughtful leadership and guidance in the process. It was an absolute pleasure meeting you, getting to know you and working with you. I certainly look forward to future opportunities and interactions with you. I think we made two excellent choices in Leadership Associates and Dr. Blake Silvers.

**Bass Lake JUESD:** Thank you Sally. I cannot express enough how grateful I am that we chose you and Leadership Associates for this process. The confidence I felt, throughout this process, in your ability to guide us, was tremendous. The step by step process that you lead us through was focused, intentional, and direct. It was a pleasure to be a part of something that was so well thought out, with excellence as your minimum standard. You are so good at what you do! I wish you continued success for all the districts that you work with in the future. They need you whether they know it or not!

Whittier City SD: Leadership Associates' process ensured the school and community that the Board valued their input and wanted them to fully participate in the process. Leadership Associates was very accessible to our needs and calls. We are extremely pleased with the support we received ...and would rehire them again without question.

**Plumas USD & Plumas COE:** Leadership Associates are exceptional at what they do. They helped us find an amazing superintendent, which has allowed us to move forward in achieving our educational goals. We would emphatically recommend Leadership Associates to any district looking to fill a superintendent vacancy. Their outstanding competence and character combined to make the experience both wildly successful and pleasant. We don't anticipate needing another superintendent for quite some time, but if we did, we would call them immediately.

**East Whittier City SD:** Thank you for appointing Sandy Sanchez Thorstenson and Marc Ecker to supervise and coordinate our superintendent search. They ran the interviews like clockwork with plenty of time for reflection of each candidate at the end of the interview. We were presented with six outstanding candidates. It was challenging to decide which of them was the best fit for our District. We are confident that our choice of superintendent is that best choice. We were delighted to work with Sandy and Marc, and will gladly recommend them as the premier search team.

**Carmel USD:** The entire process was extremely smooth and conducted with utmost respect for all parties involved. We were on time, and communication was regular, open and transparent. The most difficult part of the process was at the end of the interview process. The board had to choose only one candidate from the experienced pool of multiple candidates presented by Leadership Associates. We consider the superintendent search led by Leadership Associates an absolute success. The individual we hired is the perfect match for our students, staff and community.

**Panama-Buena Vista SD:** Leadership Associates is well connected throughout the state. The process from beginning to end was well communicated and very organized. Leadership Associates is literally a "who's who" of educators in the state. A successful superintendent search and hiring was our goal and Leadership Associates delivered!

Ft. Bragg USD: Leadership Associates brought to the search an impressive wealth and breadth of experience and contacts from large and small, urban and rural, coastal and inland school districts. Leadership Associates listened to us and recognized that although we are a small, rural district, we have high, twenty-first century goals for our kids.

**Palo Alto USD:** We recognize the selection of a superintendent is the most important decision we make as a school board, Leadership Associates designed an effective process to get to know us and to meet our needs - including recruiting candidates who were not looking for a new position.

**Summerville JUHSD:** Thank you for all the work you and the firm have completed. Wel know we were demanding because we have a really involved community. But you just moved forward and got the job done Great work!! We will highly recommend your service to any District in our County.

**University Preparatory School**: Leadership Associates was constantly available to us. Leadership Associates brought much more than guidance and experience; (the consultant) brought genuine kindness, creative vision and integrity that underpin all great endeavors. I highly recommend Leadership Associates.

**Encinitas Union**: Leadership Associates has years of experience in working with districts throughout California and their expertise was clearly evident when they provided us with an outstanding field of candidates. Their networking resources are unparalleled.

**Irvine USD**: With an unprecedented number of superintendent vacancies across the state, we were impressed with Leadership Associates' ability to attract highly qualified candidates, due in no small part to their excellent reputation and exceptional attention to confidentiality.

San Ramon Valley USD: Your team was responsive to questions raised during the process. The background checks on our candidates were thorough and there were no surprises.

**Placentia-Yorba Linda USD:** Your diligence, patience, professionalism, and the confidential manner in which you conducted the search were exemplary. Indeed, one would be hard pressed to find a team to match the level of expertise and recognition within the professional learning community which you so ably employed on our behalf.

**Palo Alto USD:** Not only does Leadership Associates bring an incredible wealth of experience and competence to the task, they also are so personally engaging and professional that it makes the process most pleasant.

**Oceanside USD:** Their work with our administrative staff, our teachers, classified staff, and our community groups was excellent. They received praise for this work throughout our community. Our principals and central office staff were treated with utmost respect, and they were very complimentary of the professionalism of this search firm.

**Walnut Valley USD:** Not only are they consummate professionals, but their process in conducting the search was impeccable – from soliciting input from the Board and community members to developing personal and professional profiles, to screening the applicants to recommending the final candidates, to helping the Board finalize the main hiring points for our new superintendent.

**Standard SD:** Leadership Associates had regular communications with the board and dependably delivered on each step in our timeline. Trust in the process was a result of Leadership Associates' extensive experience and in the actions and care.... while respecting the role of trustees as the decision makers of the district.

**Fullerton SD:** Our Board was especially appreciative of the professional manner in which Leadership Associates reached out in a meaningful way to the educational community and listened to the direction of the Board of Trustees. I highly recommend Leadership Associates to any board seeking to conduct a thorough and in-depth superintendent recruitment and selection process.

**Eureka City Schools:** Leadership Associates persevered and actively recruited candidates suitable for our unique location. Their combined knowledge and experience were invaluable. It had been 13 years since our district's last superintendent search and they supported our board throughout the entire process.

**Folsom-Cordova USD:** They received applications from California as well as other states in the country. They performed in-depth reference checks that resulted in a list of outstanding candidates to interview. Without their services as recruiters, we would not have had the rich field of candidates from which we eventually selected our new superintendent.

Fowler USD: Leadership Associates was completely thorough from their initial proposal to the Board, through the actual hiring of a successful superintendent candidate. The communication to all members of the Board and the designated District contact was exemplary throughout the process. Parents/community members/staff felt very comfortable sharing with Leadership Associates representatives the various traits valued in our next Superintendent. The on-line survey they utilized was especially helpful for members of the community and parents, as it gave them an opportunity for their voice to be heard if they were unavailable to schedule a meeting in person.

Fremont USD: Thank you all so much for your support and diligent work finding a great pool of candidates and helping us to select the best of the best.

**Evergreen SD:** Leadership Associates did an excellent job in our recent Superintendent Search process. This was the first time that our district has ever engaged in an external search process, and I found it much more rewarding and less stressful because of the superb support of Eric and Fred.

Santa Maria JUHSD: Great candidates! Appreciate your thorough vetting; best work yet for this district. My first-choice search firm does it again!!

**Kentfield:** Each of us is grateful for your great work on the search for Kentfield. we could not be more pleased by the thoughtful and extremely thorough search process. We particularly appreciated your flexibility, responsiveness, and creativity with the search over the past several weeks. Quite simply, you never skipped a beat with the search process, despite a global pandemic looming in the background. If there is ever a potential client on the fence about hiring you guys have them call me. They would be lucky to have you guys in their corner.

#### NONDISCRIMINATION CERTIFICATION

I am aware of and hereby certify that Contractor shall comply with Section 1735 of the Labor Code, which provides as follows:

No discrimination shall be made in the employment of persons upon public works because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, handicap, medical condition, marital status, or gender of such persons, except as provided in Section 12940 of the Government Code, and every contractor for public works violating this Section is subject to all the penalties imposed for a violation of [Chapter 1 of Part 7, Division 2 of the Labor Code].

By Kergy Lynch Signature

Peggy Lynch, Ed.D. Typed or Printed Name Lead Consultant, Leadership Associates Title

December 2, 2020 Date

#### WORKERS' COMPENSATION CERTIFICATION

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

(a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.

(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

	DD,
Peggy Lynch, Ed.D.	Lesen Lynch
	000

Lead Consultant Title

Leaderhip Associates Company

(In accordance with article 5 (commencing at section 1860), chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under this contract.)

# NONCOLLUSION DECLARATION TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

#### Project: Oak Park Unified School District, Superintendent Search

I, <u>Becky Banning</u>, declare that I am the <u>Executive Assistant</u> of Leaadership Associates \_\_\_\_\_, the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Company Name	Leadership	Associates		
Company Address	3905 State	Street #7-407, S	anta Barbar	a, CA 93105
Signature of Office	er Becky	Banning		
	0	Û,		

Title Executive Assistant

#### NOTARY FOR NONCOLLUSION DECLARATION

Subscribed and sworn to (or affirmed) before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

#### SEE ATTACHED NOTARIAL DOCUMENT

Signature of Notary

\_\_\_\_\_

[SEAL OF NOTARY]

Typed Name of Notary

536-22/6007051.1

# CALIFORNIA JURAT WITH AFFIANT STATEMENT

#### GOVERNMENT CODE § 8202

See Attached Document (Notary to cross out lines 1–6 below)

\_\_\_\_\_ 2 ------3\_ -----Signature of Document Signer Signature of Document Signer No. 2 (if any) A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document. State of California Subscribed and sworn to (or affirmed) before me County of \_Santa 30 day of November, 20 20. on this Month Year Date by Bech (1)(and (2) Name(s) of Signer(s) THOMAS DEMOURKAS proved to me on the basis of satisfactory evidence Notary Public - California Santa Barbara County to be the person(s) who appeared before me. Commission # 2178553 My Comm. Expires Jan 6, 2021 Signature\_ Signature of Notary Public Seal Place Notary Seal Above OPTIONAL Though this section is optional, completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document. Description of Attached Document Document Date: Title or Type of Document: \_\_\_\_ Number of Pages: \_\_\_\_\_ Signer(s) Other Than Named Above: \_

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# A SUPERINTENDENT SEARCH PROPOSAL PREPARED FOR THE



BOARD OF EDUCATION Barbara Laifman, President Allen Rosen, Vice President Drew Hazelton, Clerk of the Board Derek Ross, Member Denise Helfstein, Member

December 2, 2020

714.318.1826

2290 La Mer Court, Costa Mesa CA 92627

TheCoscaGroup@GMail.com



# **INDEX OF PROPOSAL REQUIREMENTS**

The following directory provides the location of content that addresses the proposal requirements of the Oak Park Unified School District.

REQUIREMENT	PAGE(S)
1.Detailed description of the process and	9 - 11
<b>all associated costs</b> provided in an itemized format. The selected search firm will work in collaboration with a District liaison. Some services may be provided by or in collaboration with the District liaison.	16
2.Timeline for the process (Tentative)	9
3.Services	
<b>3.1Assist Board with the development of a hiring profile</b> that is informed by Oak Park USD stakeholders which may include teachers, staff, students, board members and/or community members.	6 - 7
3.2Assist Board with local and/or national advertising of the position.	10
3.3Assist Board with local and/or national recruitment of high-quality applicants that match the established profile.	10
3.4Assist the Board with the facilitation of the applicant screening process.	10
3.5Assist the Board with the facilitation of the interview process.	11
<b>3.6Conduct preliminary background check</b> including degrees and credentials earned.	10
<b>3.7Solicit community input to inform the hiring profile</b> through at least six (6) to eight (8) stakeholder meetings.	6 - 7
4.Management of a stakeholder interview panel process to facilitate input into the decision-making process.	6 - 7
<b>5.Description of the procedure</b> Consultant will use to disclose to the District prior recruiting/searches involving any candidate that is screened.	6 - 7
6.Samples of related materials (advertising, survey forms, reports, etc.).	Addendum
7.Experience References	
7.1Background information about your firm.	3 - 5
<b>7.2Describe searches conducted for school districts and County Offices of Education</b> ; include the average length of time the candidates remained on the jobs.	4 and 19
<b>7.3Provide resumes</b> of key members of the project team, specifically the team leader assigned to facilitate this proposal.	20– 21
<b>7.4Provide the names, addresses, phone numbers, and email address of three past or current clients</b> in California who may be contacted to attest to your ability to perform the requested services.	15
8.Guarantees	-
8.1What kind of guarantee does your firm provide in the event of an unsuccessful search?	8
Nondiscrimination by Supplier	22
Workers Compensation	23
Noncollusion Declaration	24

2200 La Mor Obart, Coota Moba Orto2021

Пососостоврестиност

711.010.1020



# **TABLE OF CONTENTS**

The following content has been purposefully customized for the Oak Park Unified School District.

LETTER OF INTRODUCTION. 1
ABOUT COVID-19
WHY TCG
ABOUT TCG
METHODOLOGY
GUARANTEES
TIMELINE
THE TCG 5 PHASE PROCESS
SPECIAL EMPHASIS: THE BOARD/SUPERINTENDENT RELATIONSHIP
TESTIMONIALS AND REFERENCES    13
COST ANALYSIS
SAMPLE AGREEMENT
PARTIAL CLIENT LIST
RESUME ABSTRACT: DR. JANET BRITZ.    20
RESUME ABSTRACT: DR. THERESA DAEM    21
NONDISCRIMINATION CERTIFICATION
WORKERS' COMPENSATION CERTIFICATION
NONCOLLUSION DECLARATION
ADDENDUM (SAMPLES OF RELATED MATERIALS)



December 2, 2020

Members of the Board of Education Oak Park Unified School District 5801 Conifer Street Oak Park, CA 91377

Dear Members of the Board of Education:

It is our distinct pleasure to be considered as the search firm that will assist you in the selection of your new superintendent.

The Cosca Group (TCG) is proud to be recognized for delivering much more than the mechanics involved in a typical search. Our technique is purposefully inclusive and our consultants are personally involved and engaged in literally every aspect of the process. As a result, our consultants provide exceptionally well-informed advice and support. Although we are not the largest firm, we are a strong firm delivering first class service that is second to none.

Our client-centered approach is widely recognized for its intent focus on meeting the unique needs of each board and district while concurrently incorporating a comprehensive approach for involving stakeholders in the process. TCG consultants not only offer a range of alternatives for general or anonymous input, they make themselves available on a personal basis via email or telephone. It is a strategy that substantially contributes to enhancing trust in the board and building the effective stakeholder relationships so important for successfully serving the needs of your students, parents, staff and community.

While choosing the right person to lead a school district is always a pivotal decision, the threat of Covid-19 has the potential to further complicate an already daunting task. You can rest assured that we are prepared to deliver a fully transparent and open process digitally, complete with ample opportunities to gather input from all of your stakeholders, including families, staff and the community, while safely providing the quality support and services essential to meeting your expectations and achieving your goal.

It is our pleasure to offer the services of TCG partners Dr. Janet Britz and Dr. Theresa Daem as your search team. We believe they are a particularly good fit for Oak Park. Dr. Britz lives in Ventura County and worked in the Simi Valley Unified School District for 23 years. She continues to serve the district from time to time and to network with superintendents and administrators in the area. Dr. Daem is the former superintendent of the Laguna Beach Unified School District, which is comparable to your district in many ways. They are both widely recognized for their successful careers, particularly their expertise in board/superintendent relations and district governance. We have included resume briefs on pages 20 and 21 to underscore their capacity to meet your needs, and they will also have access to the resources and expertise of the entire TCG membership.

For more information, please visit <u>www.TheCoscaGroup.com</u> or contact Dr. Janet Britz at <u>janbritz3240@gmail.com</u> or 805.796.9772. We look forward to presenting the unique aspects of our proposal to you. Thank you for your consideration. It would be an honor to work with you.

Sincerely,

hapiro

Joel Shapiro President The Cosca Group

Dr. Jan Britz Partner

The Cosca Group

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# **ABOUT COVID-19**

Adapting the Recruitment Process to the Coronavirus Pandemic

The threat of coronavirus does not mean no one is hiring or that candidates aren't actively looking for placements. As a matter of fact, our recent experience with a virtual search confirmed that the threat of Covid-19 did not hinder the number of applicants.

It simply demands that we incorporate multiple ways to ensure that you, your staff, your stakeholders, and your prospective employees are protected to the full extent possible throughout the process.

Today's technology offers us the means to digitize our work and recruitment flow, leverage virtual meetings, forge online connections, access networks electronically and even maintain conversations with promising applicants. Working with you and your staff, our consultants will map out a detailed and coordinated plan that integrates and coordinates district and firm tools and resources for maximum effectiveness and efficiency.

Using Zoom or Google Meet or comparable online video conferencing tools, we can safely and effectively participate in board meetings, perform stakeholder individual and group input sessions, conduct candidate interviews, and more. An online survey will offer stakeholders convenient and easily accessible opportunities to provide input.

Our experience using virtual interviews confirmed their effectiveness. We found that announcing their use in advance encouraged candidate interest in applying for the position and made applicants feel safe and protected during the process so they could concentrate on answering the questions fully and completely.

More importantly, we found that interviewing remotely still allowed the Board to confirm candidates' experience, qualifications, and potential to be a successful superintendent as well as allowed the Board to assess whether they were a match for the district and possessed the soft skills needed for the job, such as effective communication skills, leadership vs management abilities, and the capacity to think strategically and implement the district's vision. Virtually collecting stakeholder input was equally as successful.

Prior to any direct contact, participants will be asked if they've traveled to affected areas in the past few weeks, whether they exhibited symptoms and so on. Though unconventional, these questions are a necessity given the worldwide exposure to this coronavirus. If a candidate is suspected of being exposed to COVID-19, a self-imposed quarantine is highly recommended.

It's important to note that the above is valid so long as it does not breach or conflict with your district policies and local laws and regulations.



# **WHY TCG**

Not the largest firm. Simply service second to none.

# PERSONALIZED

The hallmark of TCG is the personal attention our consultants devote to every detail, while the board drives the process.

We understand that, because personalities and relationships are involved, there is far more to matching a district with the right superintendent than impersonally pairing requirements with qualifications.

That is why our consultants are personally invested in learning as much as possible about the nature and expectations of each Board, district and community. Their concentrated efforts to appreciate the unique needs, traits, cultures, expectations and even the politics of the Board, staff and community enables them to deliver well-informed assistance for our clients.

# **COMPREHENSIVE**

While the typical superintendent search process incorporates one or more ways to collect stakeholder input, our approach is purposefully exhaustive, with a marked emphasis on engaging the full range of district stakeholders in identifying the particular needs of the district and the expectations of the community as well as assisting boards with their efforts to keep their stakeholders fully informed and abreast of the search process as it evolves. As an optional service, the consultants will prepare written updated reports for the Board to release to the community at-large or to post on the district website at no additional cost to the district.

This inclusive outreach centered on accurately establishing an in-depth understanding has been pivotal to successfully delivering quality candidates and concurrently launching broad support for the new superintendent, the board and the district.

Our commitment to our clients is further underscored by the fact that we do not maintain a "stable" of applicants like some firms, but instead strive to put forward candidates that are genuinely suited to the district. We recruit candidates who specifically match the requirements indicated by the board and stakeholders.

# INCLUSIVE

We are committed to fostering, cultivating and preserving a culture of equity, diversity and inclusion, and we reflect these values in every aspect of our service.

We embrace and encourage differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socioeconomic status, veteran status, and other characteristics that make each human being special.

We acknowledge and honor the fundamental value and dignity of all individuals, and we pledge ourselves to promoting an environment that respects diverse traditions, heritages, and experiences.

2290 La Mer Court, Costa Mesa CA 92627



# **ABOUT TCG**

TCG is proud to boast that five years after appointment, over 92% of TCG placements remain on the job. As a result, TCG has earned a reputation for a genuine commitment to its clients as well as for its efforts to purposely form lasting, meaningful relationships with the superintendents and districts it serves.

With its proven expertise in all phases of school district leadership, TCG has the capacity to assist a governing Board in selecting a new superintendent and in developing a working relationship that will successfully serve the needs of its students, parents, staff and community.

## HISTORY

The Cosca Group (TCG) was founded by Dr. Frank Cosca in 2000. Today it is comprised of 28 partners and associate partners, all recognized for their career achievements, representing all geographical regions of California.

# PHILOSOPHY

We believe that education is a cooperative effort of family, school, and community and that all children deserve the opportunity for success in schools.

We believe that every district deserves a leader that will recognize and build on the district's strengths, identify and address its areas of concern, and possess and model the personal characteristics that the district and community value.

We believe in involving district leadership in every phase, conferring with the Board for every key decision and providing continuous communication and frequent updates, and affording convenient and reliable access to assigned lead consultants throughout the process.

## **QUALIFICATIONS AND EXPERIENCE**

- TCG partners have successfully led geographically and culturally diverse school systems across California including small, suburban and urban school districts.
- All TCG partners and associates possess broad personal and professional networks within the state and on the national level.
- TCG partners and associates have served in leadership roles in Association of California School Administrators (President and Executive Director), California School Boards Association, American Association of School Administrators, California Association of School Business Officials and California Coalition for Adequate School Housing, California Small Schools Association, California Association of Latino Superintendents, and California Association of Bilingual Educators.
- A TCG partner was recognized by ACSA with the prestigious "Marcus Foster" award.
- Three TCG partners have been California Superintendents of the Year and nationally honored.
- A TCG partner founded the National Association of School Superintendents.
- Several TCG partners and associates teach or have taught graduate courses in Educational Leadership, School Finance and other specialties within the field of school district administration.



- TCG partners and associates have been honored with awards from educational, community, county and civic organizations.
- TCG partners have held leadership positions in the Western Association of Schools and Colleges and chaired visitations in California, Hawaii, Pacific Islands and Asia.
- Many TCG partners speak fluent Spanish.

### **SPECIAL ATTRIBUTES**

- TCG is widely recognized for its purposeful, personal attention to all phases of the search process.
- TCG customizes its process to meet the district's unique needs.
- TCG is known for delivering strong, reliable communication throughout the process.
- TCG's extensive network of partners in the state and national level offers unparalleled access to qualified candidates.
- TCG offers an online survey in English and Spanish to augment the stakeholder input collected in the extensive personal meetings.
- TCG focuses on seeking candidates that meet the district needs.
- TCG's fee is competitive and all-inclusive. There are no additional costs for advertising, consultant expenses, or other services. Furthermore, TCG offers two years of mentoring for the new superintendent at no additional cost, and we will facilitate a Leadership Alignment/Governance workshop for the board and superintendent at no cost.
- If a suitable candidate is not selected at the end of the search, TCG will repeat the search at no additional cost. If the
  new superintendent leaves for any reason within two years, we will repeat the search for expenses only.

### **COMMITMENT AND SERVICE**

TCG commitment and attention to every detail is unsurpassed.

Our lead consultants offer well-informed guidance and support because they make it a point to be personally and continuously engaged in performing every service in the process.

Unlike some firms, TCG does not outsource services or delegate responsibility to office support staff, with all but a few exceptions (such as minor clerical tasks or a need for specialized expertise).

To the contrary, TCG lead consultants collect, organize, and review relevant district data and information themselves; they review, organize and summarize stakeholder input themselves; and they develop marketing materials; and prepare reports and updates themselves, all revolving around constant communication with the Board.

The same is true of preliminary paper-screening and reference-checking applicants; furthermore, they incorporate the assistance of a TCG Panel of Experts drawn from TCG partners who are similarly knowledgeable and experienced.

TCG search services are conducted by highly skilled professionals at every juncture.

5



# **TCG METHODOLOGY**

## TRANSPARENCY

TCG standard practice is to develop an optimal communication protocol at its first meeting with the Board to assure continuous and convenient contact with the lead search consultants.

Regular updates for the board, stakeholders, and community will be provided to the Board throughout the process, with indepth details on request.

While some firms bring forward only candidates they recommend to interview, in the interest of full disclosure, TCG delivers a comprehensive report to all board members that includes the complete application package for every applicant.

TCG's commitment to transparency is underscored by the fact that it does not maintain a "stable" of applicants like some firms, but instead strives to put forward candidates that are genuinely suited to the district's needs.

### **COMMUNITY INPUT STRATEGY**

The benefits of the TCG process for collecting stakeholder input are unsurpassed in the industry. That is because it not only yields reliable feedback, it purposely promotes trust in the board and support for the new superintendent.

We introduce every input opportunity by announcing that the board has requested direct input from the district's stakeholders. We use three open-ended questions to foster candid and authentic responses.

- 1. What are the strengths in the district (i.e. the good things that are happening)?
- 2. What are he challenges in the district (i.e. the problems to be solved and addressed)?
- 3. What are the leadership characteristics and skills you would like to see in the new superintendent?

This approach allows for individual opinions and viewpoints that provide a more comprehensive perspective than closed questions that limit the subject matter or prevent introducing new information.

We emphasize that all feedback will be anonymous and that virtually every comment will be included word-for-word in the final Stakeholder Input Report presented to the board. In face-to-face meetings we make a point of writing down exactly what each stakeholder shares with us and confirming the accuracy of our notes.

It is this honest and transparent style that makes it clear to the district community that board members really want to know what they want in a new superintendent. The full power of this strategy is fully evident when the new superintendent is introduced to an optimistic and enthusiastic audience that is confident that the board truly made every effort to select a new superintendent that is the best person for the job.

## **STAKEHOLDER INPUT PROCESS**

TCG's standard practice is a thorough, personally managed, three-step input collection process customized to meet the needs

#### of the district:

<u>Step 1</u>. Consultants will meet with the board and identify the district's strengths and needs/critical issues. Based on those strengths and needs/critical issues, identify the characteristics desired in the new superintendent. The board will also identify groups and individuals representing community members, students, parents, teachers, classified employees, administrators, etc. to provide input to TCG, and recommend custom strategies to engage all representative communities within the district, including its non-English-proficient constituents. TCG does not set a limit on the number of contacts; however, it is anticipated to include a minimum of six to eight group meetings, as well as individual interviews, emails, teleconferences, and/or other means of communication as recommended by the board.

<u>Step 2</u>. Consultants will meet with the identified groups and individuals and receive input regarding the district's strengths and needs/critical issues. Concurrently one or more online surveys and/or hard copy questionnaires will be widely publicized and made conveniently available to stakeholders to gather input regarding district needs and the desired characteristics of the new superintendent. All information will be recorded, tallied, and organized into a comprehensive report to be presented to board.

<u>Step 3</u>. Consultants will meet with the board to review and analyze stakeholder input, and reexamine, modify and prioritize the district's strengths, needs, and critical issues to inform development of the hiring profile. The conclusions will then be used by the consultants to develop an electronic brochure to be presented to the board for final approval.

### SCREENING AND BACKGROUND CHECKS

Using the board-adopted candidate criteria to assess each candidate's capacity to meet the district's needs, the lead consultants independently or with a TCG Panel of Experts will screen and identify the most qualified applicants

Vetting will include, but not be limited to, appraisal of materials, preliminary reference checks and verifications, internet background reviews, and review via TCG networks and contacts.

Background checks incorporate the services of an online service that compiles reports from millions of public records and information provided by state and local governments. Reports include an address history, related persons, arrest records, bankruptcy records, government license information, social media profiles, and sex offender records.

### CONFIDENTIALITY

Maintaining applicant confidentiality is central to attracting top candidates; as a result, the names of all applicants revealed only to board members, and are kept confidential until the board publicly announces a finalist for the position. The procedure may be adapted to accommodate unique board needs and preferences.

### **STAKEHOLDER COMMUNICATION**

TCG's standard practice is to collaborate with the board and the district staff to identify the processes and procedures currently utilized and customize strategies and schedules that offer the most effective communication strategies for students, parents, employee groups, city officials and staff, and community groups. Most districts opt for a combination of social media and district website announcements and updates.

/



## **DISTRICT CONTACT(S)**

TCG's standard practice is to contact the board president or the board's designee for information related to the search process and a district-assigned staff member for scheduling, logistics, and basic operational assistance.

## **ASSISTANCE REQUIREMENTS**

The information, services, and assistance required will be minimal. Those anticipated include stakeholder contact information, assistance with arranging stakeholder meetings and their locations, and arranging public notices and reports via district publications and district social media.

# **SEARCH SCOPE**

While many districts prefer candidates with California backgrounds because they are grounded in the state's unique policies and culture, in some cases Boards prefer to reach out across the country to seek a fresh approach or a unique talent, or to cast a wider net.

TCG's standard practice is to base a search scope on the district's unique needs, challenges and preferences.

## **INTERVIEW QUESTIONS**

TCG typically presents the board with a list of potential questions, including questions carefully selected for the purpose of revealing the applicants' background, experience, style, and personal traits relevant to the district and board's needs and preferences.

TCG's standard practice is to assist the board in customizing questions and making the final selection.

### WRITING SAMPLE

TCG's standard practice is to offer the board the option of include a writing sample as part of the interview process.

# **GUARANTEES**

- TCG guarantees comprehensive disclosure of all applicants.
- TCG guarantees the superintendent selection for two years with a second search conducted for expenses only, to include advertising and printing.
- TCG guarantees the placement will not be recruited for other TCG positions.
- TCG guarantees its commitment to the district until a suitable candidate is appointed. If an additional search is required, there will be no cost.

2290 La Mer Court, Costa Mesa CA 92627



## THE TCG 5 PHASE PROCESS (TO BE CUSTOMIZED FOR THE DISTRICT)

# TIMELINE

TCG prepared the following tentative timeline, subject to revision to meet district needs:

PHASE I: PRE-RECRUITMENT PHASE II: RECRUITMENT PHASE III: INTERVIEWS PHASE IV: APPOINTMENT OF SUPERINTENDENT PHASE V: OPTIONAL SUPPORT SERVICES January 19 – February 15

February 15 – March 14

March 15 - March 31

April 1 – April 15

Two Years

# PHASE I PRE-RECRUITMENT

## TCG Meets with the Board

- Customize the process
- Determine the timeline
- Establish the district's strengths and needs/critical issues and identify the characteristics desired in the new superintendent
- Establish the board's preferences and expectations for its working relationship with the new superintendent
- Identify the full range of district stakeholders, including students, parents, teachers, classified employees, administrators, key individuals, and community members, non-English speakers and various other individuals and groups
- Determine the most effective strategies for engaging the stakeholders in determining the district's needs and the community's expectations of the new superintendent

## **TCG Collects Stakeholder Input**

- Organize and personally or remotely attend individual and group meetings
- Arrange convenient input alternatives, such as online surveys or contact via personal email or mobile phone
- Compile all stakeholder input into a full report for the board

#### THE COSCA GROUP A Leadership Development Corporation



## TCG Meets with the Board

- Review the Stakeholder Input Report together
- Confirm the district's strengths and needs and the characteristics desired in a new superintendent

## TCG Develops and Implements the Recruitment Plan

- Develop marketing brochure for board approval
- Arrange local and/or national advertising of the position
- Prepare announcement distribution
- Contact TCG partners for recommendations and referrals
- Arrange email announcement to the 1000+ California superintendents

### TCG Conducts a Superintendent Compensation Study (Optional)

TCG Provides Periodic Status Reports at Each Phase of the Process

# PHASE II RECRUITMENT

**TCG Organizes and Maintains Search Records** 

**TCG Handles All Applicant Communication and Submissions** 

TCG Prepares and Delivers Copies of All Candidate Applications for Board Member Review

**TCG Conducts Preliminary Screening of All Applicant Submissions** 

TCG Organizes a Panel of Experts to Distinguish Most Qualified Applicants

**TCG Conducts Extensive Background and Reference Checks** 

### TCG Develops a Comprehensive Candidate Report for the Board

- Lists all applicants
- Summarizes backgrounds and qualifications
- Provides reference check findings
- Recommends finalists for interviews

### **TCG Provides Periodic Status Reports**



# PHASE III INTERVIEWS

### **TCG Meets with the Board**

- TCG reviews Candidate Report with the board
- Board selects candidates to interview
- TCG facilitates and assists board selection of interview questions

#### **TCG Schedules Interviews**

- TCG arranges and facilitates interviews of all selected candidates
- TCG arranges and facilitates final interview(s) as determined by the board
- TCG notifies applicants who are not invited for second interview

# **PHASE IV**

## **APPOINTMENT OF NEW SUPERINTENDENT**

## **TCG Facilitates Culmination and Final Board Approval**

- TCG assists selection and confirmation of finalist
- TCG arranges board visit to finalist's district
- TCG reviews complete Stakeholder Input Report, including the summary and all detail, with new superintendent
- TCG assists board announcement of the new district superintendent (optional)

# PHASE V SUPPORT

### **TCG Optional Services**

#### Included in Fee

- Compensation study
- Assist negotiation of key sections of the new superintendent's employment contract
- Mentor and support new superintendent for up to two years
- Conduct a Leadership Alignment Workshop with board members and new superintendent focused on governance expectations and related protocols, as well as board and superintendent goals



# FOCUS ON THE BOARD/SUPERINTENDENT RELATIONSHIP

Because TCG understands that the degree to which board members and the superintendent effectively function as a team is pivotal to the future of a school district, its search process incorporates opportunities to weigh the potential for developing a successful and productive working relationship with each candidate.

- The TCG search process includes an opportunity for the board to collectively establish their preferences and expectations for the new superintendent.
- The TCG search process provides an opportunity for applicants to describe their leadership styles and anticipated approach to the superintendent/board working relationship in a writing sample, a questionnaire, and/or the interview.
- The TCG search process offers an opportunity for the board to compare the responses of the applicants provided in Phase II with the preferences and expectations established in Phase I.
- The TCG search process includes an optional Leadership Alignment Workshop for the board and superintendent that
  is centered on initiating the new relationship with mutually developed, defined and understood policies and expectations.



# **TESTIMONIALS**

"Their process and team leaders have a unique ability to balance driving the process and providing valuable input with listening and engaging the Board . . . "

Board of Education San Bernardino City Unified School District

 $".\,.\,$  we found our association with The Cosca Group to be a very successful experience."  $$\sf R.\,E$$ 

R. Elizabeth Jaka Board of Trustee, President Vista Unified School District

"They demonstrated their extensive experience in superintendent searches along with their strong commitment to perform the work outlined in the proposal . . . "

Frank A. Tarantino, Board President Sweetwater Union High School District

"Our Board, District and community are thrilled with their professional work. We commend The Cosca Group for the high degree of professionalism and organizational skills demonstrated throughout this process."

Jannie Dutton President, Board of Trustees Keppel Union School District

"Very professional behavior with our stakeholders in gathering information about district strengths, challenges, and what they wanted to see in the new superintendent."

> Peggy Foster Board President Eastside Union School District

"The Woodland Joint Unified School District has used The Cosca Group in two occasions and in both instances they have delivered a highly qualified Superintendent."

Samuel Blanco III Board President

"Our district and community have nothing but the utmost respect and praise for the work they did for us." Lucy Rangel President of the Board Fillmore Unified School District

13

714.318.1826



"The Cosca Group was very professional throughout the entire process. From the onset, the process was thorough, professional, and extremely efficient. The process entailed time to get to know our "District, our staff, and our community, so that we could find a leader that would fit our particular needs."

D. Don Revelo School Board President Millbrae School District

"They promised a 'winner' and they delivered."

Brian Clapper Board President National School District

"As president of the EUSD school Board, and on behalf of the entire Board, I highly recommend the services of The Cosca Group as your educational executive search firm."

> Martin J. Hranek, Trustee Escondido Union School District

"They are passionate about education and the importance of getting the right superintendent/district match for the sake of students and staff."

> Elisabeth C. Ellers Board President South Pasadena Unified School District

"The attention to detail and understanding of our community were tremendous . . . I, on behalf of the Vista Unified School District Board of Trustees, offer our highest recommendation to the company."

Rich Alderson, President VUSD Board of Trustees Vista Unified School District

"The Board of Education for the Mammoth Unified School District thanks Mr. Shapiro and Dr. Britz for their selfless, professional, and excellent service in guiding us through the selection and hiring process of our new superintendent. The end result of their process was outstanding."

> John Stavlo President of the Board of Education Mammoth Unified School District

"Steve Goldstone and Dave Brown, Cosca Group consultants, have carefully steered the district through a process that allowed all stakeholders input into this most critical action. This followed Cosca Group's mission statement: 'We involve district leadership in every phase and every key decision and provide continuous communication, frequent updates, and convenient access to consultants throughout the process.' As these consultants have delivered on these promises during the past four months, they have earned the respect of the trustees and the community, so that an extended wait for the right superintendent becomes more than an act of faith."

2290 La Mer Court, Costa Mesa CA 92627

By: Lanny Lowery, Staff The Community Voice Newspaper Rohnert Park-Cotati-Penngrove

714.318.1826



"Cosca Group and its two consultants who have led this search realize their task goes far beyond the duties of headhunters. Public education, the foundation of American values, relies on the participation of all community members. Cosca Group asserts its belief system just below its letterhead: 'We believe that education is a cooperative effort of family, school, and community and that all children deserve the opportunity for success in schools'."

By: Lanny Lowery, Staff The Community Voice Newspaper Rohnert Park-Cotati-Penngrove

# REFERENCES

TCG recently concluded an executive search conducted virtually for the Keppel Union School District:

Dominique Ballante Board President Keppel Union School School <u>dballante@keppel.k12.ca.us</u> (661)269-6599

TCG is also pleased to offer the following references:

Jannie Dutton, Board President Keppel Unified School District 34004 128th Street East Pearblossom, CA 93553 (551) 547-0160

Nancy Armenta, Board President Rosemead Unified School District 3907 Rosemead Blvd. Rosemead, CA 91770 (626) 632-1398 John Stavlo Board President Mammoth Unified School Dist. 462 Sierra Park Road Mammoth, CA 93546 (760) 934-5674

Peggy Foster, Bord President Eastside Unified School District 45006 30th Street Lancaster, CA 93535 (661) 350-2553

More are available upon request as indicated in the extensive list of testimonials list provided above.



# **COST ANALYSIS**

A total fee of \$19,500 is based on a search design specific to the Oak Park Unified School District inclusive of the services and expenditures described in this search proposal dated November 5, 2020. Said fee includes, but not limited to:

- Providing Board support and guidance throughout the process
- Attending or participating in related meetings with the Board
- Conducting all community input sessions
- Providing an online survey for stakeholder input
- Preparing a written report detailing and summarizing all stakeholder input sessions
- Developing an electronic marketing brochure
- All state and national advertising expenses
- Fielding inquiries from potential and active candidates
- All application processing, assessing and paper-screening
- Preparing a written report detailing and summarizing all applicants for the position
- Preparing a list of candidates recommended for Board interviews
- Drafting interview questions for the Board
- Informing all applicants of their status throughout the process
- Conducting preliminary reference and background research of all viable candidates
- Conducting in-depth background checks of finalist(s)
- Scheduling and facilitating all interviews
- All candidate formal notifications
- Facilitating finalist site visit
- All proposal guarantees, including a second search conducted for expenses only
- Providing two years of mentoring for the new superintendent
- All clerical expenses and printing
- All lead consultant travel and lodging expenses
- Conducting a Leadership Alignment/Governance Workshop with Board members and new superintendent focused on governance expectations and related protocols, as well as Board and superintendent goals



## **SAMPLE AGREEMENT**

## **The Oak Park Unified School District**

## and

## The Cosca Group

THIS AGREEMENT made and entered into this day of , by the Oak Park Unified School District, a political subdivision of the State of California (hereinafter "DISTRICT") and The Cosca Group, (hereinafter, "CONSULTANT").

The DISTRICT desires to retain a CONSULTANT to perform special services for the search and recruitment of the superintendent.

Ι.

II.

CONSULTANT is specially trained, experienced and competent to perform such special services and render such advice.

#### Ш.

1. CONSULTANT, upon notice to proceed from the DISTRICT, shall provide to the DISTRICT such special services and advice, more particularly as set forth in the Proposal presented to the DISTRICT on June 29, 2020, which is incorporated by reference herein.

2. In consideration of the foregoing, DISTRICT shall pay CONSULTANT A FEE NOT TO EXCEED \$19,500. CONSULTANT shall invoice DISTRICT in three installments as follows:

(1) \$6,500.00 at the time of the development and presentation of the profile.

(2) \$6,500.00 at the presentation of a slate of final candidates.

(3) \$6,500.00 at the appointment of the new superintendent.

Terms of payment shall be net 45 days.

3. CONSULTANT shall well and faithfully perform each and all of the obligations set forth in the Agreement. CONSULTANT shall at all times be deemed an independent contractor, and neither the CONSULTANT nor any of its employees shall be considered employees of the DISTRICT for any purpose.

4. At all times, CONSULTANT shall work in cooperation with, and pursuant to the direction of the Superintendent of the DISTRICT, or the Superintendent's designee.

5. The DISTRICT shall have the right to terminate this Agreement at any time upon fifteen (15) calendar days' prior written notice. Should the Agreement be terminated, the DISTRICT shall be responsible for payment related to all services provided by the CONSULTANT up to the point of termination.

WHEREFORE, the parties have executed this Agreement on the date first above written:

FOR:		The Oak Park Unified School District
Date:		
By:		
2		Signature Board President
FOR:		The Cosca Group
Date:		
By:		Signature Joel Shapiro, Board President
2		2290 La Mer Court Costa Mesa, CA 92627 Phone: 714-318-1826
Federal I.D.	Number: <u>33-0972414</u>	



# **PARTIAL CLIENT LIST**

Baldy View Regional Occupational Program Brawley Union High School District Cotati-Rohnert Park Unified School District Delhi Unified School District El Rancho Unified School District El Segundo City Police Department Fillmore Unified School District Hermosa Beach Unified School District Keppel Union School District Laguna Beach Unified School District Lytle Creek Development Partners Mammoth School District Moreno Valley Unified School District Mountain View-Whisman School District Novato Unified School District Orange Unified School District Palisades Charter High School Redondo Beach Unified School District Rosemead School District San Bernardino Unified School District San Lorenzo Unified School District Santee School District South Pasadena Unified School District Sulphur Springs School District Tamalpias Union High School District Vista Unified School District Washington Union School District Windsor Unified School District Woodland Joint Unified School District Millbrae School District

Bonita Unified School District Chino Valley Unified School District Culver City Unified School District **Desert Sands Unified School District** Eastside School District Escondido Union School District Hayward Unified School District Huntington Beach City School District King City Unified School District Livermore Valley Joint Unified School District Madera Unified School District Monrovia Unified School District Morgan Hill Unified School District National City School District Oceanview School District Palos Verdes Peninsula Unified School District Paradise Unified School District **Rialto Unified School District** Saint Helena Unified School District San Gabriel Unified School District Santa Ana Unified School District Silver Valley Unified School District Sweetwater Union High School District Tahoe Truckee Unified School District University of Southern California Washington Unified School District Waugh School District Wiseburn School District **Yosemite Unified School District** 

714.318.1826

2290 La Mer Court, Costa Mesa CA 92627

# Jan Britz, Ed.D.

A Life-Long Career in Pursuit of Excellence

3240 Texas Avenue Simi Valley, CA 93063

## EXPERIENCE

Partner, The Cosca Group A Leadership Development Corporation

Superintendent of Schools Burbank Unified School District

Assistant Superintendent of Schools Burbank Unified School District

Assistant Superintendent South Pasadena Unified School District

Director of Human Resources South Pasadena Unified School District

#### Principal

Simi Valley High School, Simi Valley Unified School District Valley View Middle School, Simi Valley Unified School District Sequoia Junior High School, Simi Valley Unified School District

#### Adjunct Professor

California Lutheran University California State University, Los Angeles California State University, Northridge Moorpark Community College

## EDUCATION

Ed.D. University of Southern California M.S. California State University M.A. California State University Northridge B.A. Eastern Michigan University 805.796.9772 Mobile 805.522.1097 Land Line janbritz3240@gmail.com

#### PHILOSOPHY

Every child has a right to the finest possible education in a safe and healthy environment.

#### SPECIAL EXPERTISE

- >Program Planning and
  - Implementation
- ➤Personnel Practices
- >Board/Superintendent Relationships
- >Leadership and Management
- >Performance Evaluation
- >Policy Development
- >Stakeholder Engagement
- >Instructional Supervision
- >Public Relations

#### **RECOGNIZED FOR**

- >Leadership
- >Loyalty
- >Perseverance
- >Work Ethic
- >Professionalism

#### CERTIFICATIONS

K-12 Administration
 California Life
 K-12 Teaching, Mathematics
 California Life

# Theresa A. Daem, Ed.D.

A passionate advocate for serving the unique needs of every child

401 Seaward Road Villa 13 Corona Del Mar, CA 92625 949.922.7300 Mobile 949.723.5023 Office stdaem@sbcglobal.net

## SELECTED ACHIEVEMENTS

Partner, The Cosca Group A Leadership Development Corporation

Founder and Executive Director The National Association of School Superintendents

Superintendent of Schools Laguna Beach Unified School District

Superintendent of Schools San Bruno Park School District

Associate Superintendent Brawley Union High School District

State Superintendents Committee Member Association of California School Administrators

Board President San Mateo County School Insurance Group

Adjunct Professor, Educational Leadership University of Santa Clara

## Local Program Director

State Department of Education Designated Exemplary School Improvement Program

Chairperson South Orange County SELPA

School Support Team Leader Nevada Department of Education

## CERTIFICATIONS

K-12 Administration	California	Life
Reading Specialist	California	Life
English	California	Life

## PHILOSOPHY

Excellence is not an accident; it is the product of an unrelenting focus on continuous improvement.

#### SPECIAL EXPERTISE

- Board/Superintendent Relationships
- Leadership and Management
- School Improvement
- Instructional Supervision
- Performance Evaluation
- HR Practices
- Policy Development

#### **RECOGNIZED FOR**

- > Dedication
- Commitment to Continuous Improvement
- Leadership
- Loyalty
- Perseverance
- ➤ Work Ethic

### **EDUCATION**

- Ed.D. University of Southern California
- M.S. Eastern Montana State University
- B.S. Education, Eastern Montana State University



#### NONDISCRIMINATION CERTIFICATION

I am aware of and hereby certify that Contractor shall comply with Section 1735 of the Labor Code, which provides as follows:

No discrimination shall be made in the employment of persons upon public works because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, handicap, medical condition, marital status, or gender of such persons, except as provided in Section 12940 of the Government Code, and every contractor for public works violating this Section is subject to all the penalties imposed for a violation of [Chapter 1 of Part 7, Division 2 of the Labor Code].

Bv Signature Dr. Jan Britz

Partner, The Cosca Group

Title

December 2, 2020

Date

Typed or Printed Name



## WORKERS' COMPENSATION CERTIFICATION

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

(a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.

(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Dr. Jan Britz. Partner

Title

The Cosca Group

Company

(In accordance with article 5 (commencing at section 1860), chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under this contract.)



## NONCOLLUSION DECLARATION TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

## Project: Oak Park Unified School District, Superintendent Search

 Dr. Jan Britz , declare that I am the Partner of The Cosca Group the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Company Name	The	Cusc	a y	Voup
Company Address	3210	Deva	2 ald	Muc
Signature of Officier		anet !	Sun	_
Tale <u>Pa</u>	ing	h-	0	



Subscribed and sworn to (or affirmed) before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

Signature of Notary Certificate Attached for California Notary Wording

[SEAL OF NOTARY]

Typed Name of Notary

\$34-33-6007051.1

CALIFORNIA JURAT (CALIFORNIA GOVERNMENT CODE § 8202)						
A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.						
STATE OF CALIFORNIA COUNTY OF VENTURA						
Subscribed and sworn to (or affirmed) before me on this <u>30</u> day of <u>MOVCN b6</u> 20 <u>20</u> by <u>Tainet Britz</u> , proved to me on the basis of ( <i>Name of Signer(s)</i> ) satisfactory evidence to be the person(s) who appeared before me.						
Signature of Wotary Public (Notary Seal)						
(Notary Seal)						
ADDITIONAL OPTIONAL INFORMATION						
Description of Attached Document						
Title or Type of Document: Document Date:						
Number of Pages: Signer(s) Other Than Named Above:						
Additional Information:						

## Addendum: Sample Documents Oak Park Executive Search Proposal

## ADVERTISEMENT

Eastside Union School District (ADA 3,450)-Los Angeles County – The Cosca Group (TCG) – Superintendent. Deadline: 10/13/17. Competitive and Negotiable. Search Consultants: Pat Puleo (714-318-1826/email: ppuleo@gmail.com), Joel Shapiro (626-497-5059/email: jshapiro516@gmail.com). To apply: Electronic brochure, application, and application procedures: <u>www.thecoscagroup.com.</u>

For electronic ad:

District: Eastside Union School District (Los Angeles County) ADA 3,450 TK-8 Position: Superintendent deadline: October 13, 2017

Salary: Competitive and Negotiable

Contact: Joel Shapiro (626) 497-5059 jshapiro516@gmail.com

Pat Puleo (714) 318-1826 ppuleo@gmail.com

For Application Form and Procedures go to: www.thecoscagroup.com

A Leadership Development Corporation

## Addendum: Sample Documents Oak Park Executive Search Proposal





# **AN INVITATION TO APPLY**

# **SUPERINTENDENT** Mammoth Unified School District Mammoth Lakes, CA 93546

The Board of Trustees of the Mammoth Unified School District seeks a long-term relationship with an exceptional and collegial educational leader who can maintain and build on the District's strengths and potential.

## **The District and Community**

The Mammoth Unified School District is a remote rural district in the town of Mammoth Lakes situated in the Sierra Mountains in Mono County. Mammoth Lakes is a small but lively region of four square miles characterized by its mountains, lakes, streams, and forests. It is frequently referred to as one of the finest ski resorts in the western United States. It is approximate midway between San Francisco and South Reno, Nevada. Mammoth Lakes has an economy based primarily on tourism. The population of the town is a little more than 8000 but peak season can bring in as many as 35,000 people.



Mammoth Unified School District educates more than 1,200 Transitional Kindergarten through 12th grade students on a traditional calendar schedule. Approximately 1,200 students are enrolled in the District's three schools, Mammoth Elementary (TK-5), Mammoth Middle School (grades 6-8), Mammoth High School (9-12). Sierra High School is also one of the District's schools and serves students sixteen to eighteen years of age who need an alternative high school program. The staff consists of 68 teachers, 54 classified and confidential employees, and 5 administrators.

Mammoth USD is a locally funded school district which just hoovers just above the LCFF funding level. It is a basic aid district with the current year income over \$14 million and holds a 22% reserve. A facility bond was just passed in 2018 for \$63.1million. The District is fiscally sound.

There are two main demographic groups: Hispanic (approximately 60%) and white (approximately 40%). Approximately 55% of the student population comes from socioeconomically disadvantaged families.

The District is proud of the recognitions that schools have received. The District has been placed on the College Board AP Honor Roll for three consecutive years; 2015,2016, and 2017. Mammoth High School received the US News and world Report Gold Award – top 6% of CA high schools in 2016. Currently, 25% of the student at Mammoth High School are concurrently enrolled in Cerro Coso Community College. They also have 67% of their students take at least one college level course, either Advanced Placement or a Concurrent College, before their high school graduation. At the elementary school, they have a very successful Dual Immersion Program and a music program for all students. The Middle School offers foreign Language to all their students.



## **Mission Statement**

The Mammoth Unified School District is a challenging academic environment that embraces the diversity of the entire community and encourages lifelong learning.

The Mammoth Unified School District is committed supporting students' to individual needs and preparing them for the future by instilling them with confidence. The school district encourages all students to push themselves to achieve develop socially, and emotionally, physically and academically. The parents and staff are very involved in their students' learning, recognizing their challenges and successes, while nurturing their individual talents and celebrating their diversity.

## THE DISTRICT'S GOALS

The District priorities are reflected in the District's LCAP and aligned with those established by the State of California.

## **Academic Achievement**

Improve the academic achievement through implementation of best practices to promote critical thinking, problem solving and creativity for all students. Ensure that all students have access to a rigorous curriculum delivered through consistent use of exemplary instructional practices aligned to the Common Core State Standards. Narrow the achievement gap that currently exists between student subgroups.

## **Fiscal Responsibility**

Designate the financial resources needed to support the schools and the District as a whole. Ensure that district resources are clearly targeted toward district Priorities while maintaining a positive financial standing for the district. Seek to ensure that all constituents understand and have opportunity for input regarding the District's budget.



## Communication, Culture, and Safety

Enhance the communication with all stakeholders while creating a respectful and supportive culture with high expectations for all students and staff. Ensure the ongoing safety for students and staff through thoughtful planning and preparedness, cooperative relationships with community agencies, and by providing and planning for a positive and productive learning and working environment. Increase opportunities to fully engage Hispanic parents, students and families.

## Technology

Support technology as an integral tool for teaching, learning, and working in MUSD. Encourage student learning regarding Science, Technology, Engineering and Math. Seek cost effective means to keep technology current for students and staff.

## District Strengths, Needs/Critical Issues, and the Characteristics Desired in a New Superintendent

Board members, parents, certificated and classified staff, students, and community members participated in a process to identify the strengths and needs/critical issues of the Rosemead School District and the characteristics desired in their new Superintendent. An extensive number of stakeholders participated in this process through meetings and an online survey. The Board of Trustees prioritized those elements as follows:

## Strengths of the District

- Highly qualified, stable teaching staff, committed to students and vested in the community
- Safety and security are high priorities
- High-quality academic and social-emotional programs, for example, Gram March, Leader in Me, PBIS
- Schools have received recognitions, such as Distinguished Schools and Lighthouse Schools
- Annual improvement in academic progress, one of the top-performing school districts in the San Gabriel Valley
- Small district with cohesive, supportive staff
- Diversity of community and staff
- Technology is a priority and progress is evident
- Supportive parents who are invested in their children's education
- Good relationship between District and employee associations

## Greatest Needs/Critical Issues Facing the District

- Declining enrollment
- District Office is currently understaffed
- Desire to improve communication, transparency, and accountability
- Need the resources to keep up with most current technology
- Shortage of substitute teachers
- Desire to expand parent participation
- Need to build strong working relationships at all levels
- Challenge in implementing unfunded state mandates

## Desired Characteristics of the New Superintendent

A leader who:

- Is a good communicator and good listener
- Will always put students first
- Demonstrates integrity and transparency
- Is experienced and knowledgeable in a broad range of school district leadership functions and has a record of success
- Is self-motivated, proactive, a visionary
- Is open-minded and collaborative
- Will hold everyone accountable
- Is a strong leader, accessible, visible at schools, and invested in the community
- Will support academic growth and successful programs
- Is willing to make a long-term commitment to the District
- Inspires and motivates staff and community members

## **The Selection and Application Process**

Mr. Joel Shapiro and Dr. Jan Britz of The Cosca Group (TCG) have been retained by the Rosemead School District Board of Trustees for the search, recruitment, screening, and selection process for the new Superintendent of Schools.

Interested applicants must submit all of the following to be received by The Cosca Group on or before October 19, 2018.

- Completed Application Form (as provided herein)
- Personal Letter of Application
- Resume including record of professional education and professional experiences
- College or University Placement File forwarded by request of the applicant **OR** letters from five professional references (three of which must be current)

During the screening process, reference checks will be made with those familiar with candidates' professional performance. Board members will visit the district and community of the final candidate.

Send Completed Application and Related Information electronically to:

The Cosca Group c/o Mr. Joel Shapiro and Dr. Jan Britz jshapiro516@gmail.com

All material must be received by the deadline of **4 p.m. October 19, 2018** 

## **CONTRACT TERMS**

The successful candidate will be offered a multi-year contract with a competitive and negotiable salary based on qualifications and experience.

For additional information, please contact:

- Mr. Joel Shapiro (626) 497-5059/ jshapiro516@gmail.com
- Dr. Jan Britz (805) 796-9772 / janbritz3240@gmail.com

## **BOARD OF EDUCATION**

John Stavlo, President Shana Stapp, Clerk Deanna Campbell, Member Tom Painter, Member Kathleen Taylor, Member The Cosca Group

#### Mammoth Unified School District

Superintendent Search

#### **EXECUTIVE SUMMARY**

## **STAKEHOLDER INPUT REPORT**

#### Data Gathered by Mr. Joel Shapiro and Dr. Jan Britz, January 14-16, 2019

#### **Strengths of the District**

- Small district, people know each other
- Community support is strong bond measure, parcel tax, foundations
- Collaborative relationship with Cerro Coso college, students able to be concurrently enrolled in college courses
- Strong programs available for students dual language immersion, music program, sports programs
- Diverse population
- Teachers work collaboratively to analyze data and plan instruction
- Staff members care about and are committed to students
- Transparent communication
- Technology is strong one-to-one ratio of devices to students

#### **Needs/Critical Issues Facing the District**

- Need to plan for, and effectively manage, construction projects
- Need greater outreach to Latino community
- Geographical location is remote, and weather can be a challenge
- Funding is an ongoing challenge
- Achievement gap
- Shortage of substitute teachers
- Need for more bilingual staff members

#### **Characteristics of New Superintendent**

- Will stay in Mammoth, be involved in the community and will reach out to Latino community
- Has been a teacher and educational leader
- A strong instructional leader
- Has integrity
- Skilled communicator and a good listener
- Loves kids, will put students first
- Experience with budgets and able to manage major construction projects
- Collaborative
- Will support process for teacher collaboration and data analysis that is in place
- Bilingual is recommended

### Addendum: Sample Documents Oak Park Executive Search Proposal

The Cosca Group Mammoth Unified School District Superintendent Search

## **STAKEHOLDER INPUT REPORT**

#### Data Gathered by Mr. Joel Shapiro and Dr. Jan Britz, January 14-16, 2019

## **Purpose of Report and Significance of Data**

On January 7, 2019, the Board of Trustees of the Mammoth Unified School District approved The Cosca Group as consultants to assist the District in the process of selecting a new superintendent to replace the current district superintendent, who will retire in June 2019. The Cosca Group prepared a schedule for the superintendent search, which was developed with the Board in December and finalized at the January 7 Board Meeting via videoconference. The schedule included a few days when the two consultants would meet with identified groups and individuals to receive input on the strengths of the District, critical issues and needs facing the District, as well as characteristics desired in the new superintendent. The consultants met with a total of 68 people in focus-group and individual meetings who were representative of the Rosemead community and the School District. The groups included students, parents, District employees, parent support groups, and community members. TCG also held an open forum for parents, staff, and community members. All meetings were advertised using District procedures.

The following report presents the input received at each of the hour-long input sessions. The consultants listened to several hours of comments from the representatives of the Mammoth Unified School District community who shared their thoughts concerning the District's strengths and critical issues, as well as the characteristics desired in the new superintendent. The input from these individuals is presented in the attached report in an unedited format.

The input from the stakeholder groups has been, in most cases prioritized by the participants. All items presented as **bolded in black** are the top priorities to give the comments greater attention.

Survey forms from school community members will also be shared with Board members on January 28, 2019. The surveys contain the designation of the individual who submitted it

The Board of Trustees will review the input provided from this report in an open study session of the Board on January 28, 2019. From the input in this report, The Board will agree upon the most important strengths and needs of the District, as well as the desired characteristics of the new superintendent. This information created by the Board of Trustees will be treated as the "profile" of the District and new superintendent. As such, the desired characteristics will be printed in all recruitment documents and will be used as the criteria against which all applicants will be evaluated during the screening process, interviews and final selection process.

## Strengths of the District

- Rural environment, beautiful place to live
- Small district, easy to get to know everyone
- Diverse community, economically and ethnically
- Collaborative relationship with college
- Class seizes generally smaller than in most districts
- Financial support from community parcel tax renewal and bond measure passed by large majority
- Open lines of communication
- Positive perception of school district
- Funding support from NOW and Mammoth mountain Community Foundations
- People are committed to district because there are no other options
- Principals communication among schools
- Strong programs e.g., Strong programs, e.g., dual immersion, music programs
- Parents are listened to and are very involved within and outside of classroom

## Needs/Critical Challenges Facing the District

- Need a long-term facilities plan, construction will be a challenge
- Plan for long-term financial security , deficit spending
- Need to cultivate the next generation of committed community members to keep the district strong
- Isolation of staff, lack of networks
- Weather is a challenge, harsh environment
- Latino community is underrepresented, outreach is difficult
- Need for a college-going culture for everyone
- Safety and security
- Lack of social-emotional curriculum
- Lack of resources for needed support personnel
- Very few staff members coach sports or are involved in extra-curricular activities; need to attend more events
- Disconnect between teachers and coaches
- Teachers need to be motivated and we need to attract new talent
- Lack of staff training on outreach to parents
- Need a more parent-friendly culture among teachers and staff members
- Limited courses available at high school
- Limited housing

## Characteristics of New Superintendent

- Good communicator
- Good listener
- Will be involved in the community
- Collaborative with other entities
- A doer, a problem solver
- Emotionally invested in students
- Sees need for arts in schools, willing to grow arts programs
- A visionary, willing to go beyond what is mandated
- Committed to Mammoth, will stay here
- Enjoys living in a small, rural community, enjoys active, outdoor lifestyle
- Will advocate for sports programs
- Creative, thinks outside the box
- Strong backbone, will stand up for what he/she believes in
- Confident, without being arrogant
- Bilingual preferred
- Has integrity
- Positive motivator
- Visible
- Experience with diverse community
- Tech savvy
- Aware of what students are doing, familiar with social media
- Will accept and appreciate what we have

### Group B (4)

### Strengths of the District

- Staff at three schools work together
- Somewhat safe, good work environment, students feel safe
- Community support
- Good communication system with parents
- Diverse population
- Beautiful area
- Longevity of staff

#### Needs/Critical Challenges Facing the District

- Need more support for special education and issues with special education as it impacts employees
- Issues with vehicles for student transportation need to repair and replace
- Student discipline needs to be tighter and more consistent
- Maintenance, facilities and parking needs at sites

- Student drop-off is a problem
- Security is an issue unable to lock doors because of trailers
- Many positions have been reduced in hours and hard to fill part-time jobs
- Positions have been eliminated, people wear many hats
- Aides need more support and respect underappreciated
- Divide between teachers and classified staff

#### Characteristics of New Superintendent

- Knowledge of special education
- Knows Mammoth wants to be in a small, remote town
- Good communication skills
- Will have an open door policy
- Able to deal with angry parents
- Experience as a teacher and educational leader
- Tells it like it is
- Confident to do what is right
- Really likes to work with kids
- Outdoors person, likes nature

### Group C (4)

#### Strengths of the District

- Great place to live
- Very supportive, stable Board
- Strong involvement among Anglo, English-speaking parents
- Stable staff, high employee retention rate
- Strong financial support from community NOW Foundation, Mammoth Mountain Community Foundation, PTO's
- Small district, more personal attention
- Many opportunities available to students athletics, leadership, band, etc.; students don't get shut out
- Great relationship with college, opportunity for concurrent enrollment
- Bond measure has passed
- Closeness of community
- Positive image of district
- Partnerships with community organizations. e.g., hospital, police, Rotary Club
- Instructional program has been proactive, especially in Spanish

Needs/Critical Issues Facing the District

- Implementing construction projects won't be easy
- Politics related to bond measure, community demand

- Bicultural population lack of equity
- Achievement gap
- Staff demographics do not match student population need more Latino and bilingual teachers
- Shortage of substitute teachers
- Lack of sufficient housing, housing is expensive
- Small district people know each other too well, takes longer to build trust
- Outsiders have difficulty being accepted
- Teachers and administrators ae isolated
- Superintendent "wears every hat"
- Challenge for teachers to take on extra duties
- Alcoholism and domestic violence in the community

## Characteristics of New Superintendent

- Patience and perseverance
- Skilled communicator
- Confidential, discreet, high level of professionalism
- Calm
- Willing to participate in the community
- Able to build trust as job #1
- Puts students first
- Strong leader, not just a manager
- Loves what he/she is doing
- Has humility
- Spokesperson for schools
- Good mentor
- Able to manage facility construction
- Strong instructional leader
- Will stay in Mammoth
- Able to reach across and bridge different communities

## Group D (4)

## Strengths of the District

- Community as a whole, including staff and students
- Small town, people look out for each other
- Schools offer lots of different programs for students
- Relatively diverse population, socially and economically
- Staff is highly qualified
- Strong sports programs

- Teachers are collaborative
- Focus Schools process

### Needs/Critical Issues Facing the District

- Need a person to work with all agencies in town
- Need more transparency
- Need better communication
- Budget issues
- Special education needs better administration
- Improved staffing decisions to utilize staff to best meet student needs
- Need to improve ELD program, grades K-12
- Lack of bilingual administration results in issues of communication and trust
- Safety plans need work
- Shortage of substitutes, low pay for substitutes
- Lack of relationship between Board and staff
- Lack of qualified classified aides

Characteristics of New Superintendent

- Intelligent, has good judgment
- Good communicator
- Bilingual preferred
- Extensive experience as teacher, principals, and educational leader
- Experience with budget
- Versatile and flexible
- Approachable, will have open door policy
- Experience in a small town and small school district
- Wants to stay and be invested, be part of the community
- Resourceful, creative
- Has as backbone, will say No
- Collaborative, willing to share leadership
- Experience with safety plan and safety issues/managing a crisis situation
- Will follow through
- Honest, has integrity
- Visible
- Hard working

## Group E (14)

#### Strengths of the District

- Small, cohesive community with family feel
- Involved parents
- Great teachers and classified staff
- Some small classes at the high school, especially AP classes
- Concurrent enrollment in college classes about 1/3 of high school students
- Bond measure has passed, new facilities to come
- Dual language immersion in grades K-5
- Diverse population at all schools
- Students are accepting of each other strong integration of ethnic groups
- Volunteer culture many volunteers in sports program
- Strong sports program at the high school
- FLEX program supports skiers and snowboarders in grades 6-12
- Stable staff, low turnover
- Quality music programs in grades 4-12
- Ski P.E. program in elementary school
- Collaborative culture
- Technology 1 to 1 ration of devices to students

### Needs/Critical Issues Facing the District

- Remote, rural location, lack of services for special education students
- Limited class offerings
- Professional development opportunities (conferences and workshops) are limited and expensive
- Staff members do multiple jobs, "wear many hats"
- People often have to work beyond their job description, staff is overworked
- Substitute teacher shortage
- Overly reliant on volunteers
- District has been deficit spending
- Buses and other vehicles are old, some need to be replaced
- Transporting students is a challenge under poor weather conditions
- District leadership is top-down
- Relations between teachers and administration varies from school to school
- Follow-through from administration to staff members is sometimes an issue
- Achievement and motivation gap among students needs to be addressed
- Many long-term English learners

## Characteristics of New Superintendent

- Transparent
- Good communicator
- Bilingual preferred
- Experience as a teacher and educational leader
- Has lived in a rural, cold environment
- Experience with implementing a bond measure
- Visible
- Business savvy
- Will ask for input and seek to know the community
- Willing to share leadership
- Has knowledge of special education
- Approachable
- Has knowledge of dual immersion/bilingual programs
- Has integrity
- Will communicate honestly with School Board
- Will honor and respect labor contracts
- Will "have staff members' backs"
- Will have clear and consistent consequences regarding behavioral issues

## Group F (6)

### Strengths of the District

- Strong leadership in place under current superintendent
- Strong community support e.g., bond measure, renewal of parcel tax
- Very involved parents
- Small, personalized district
- Configuration of the schools very close and convenient
- Transparency
- Active lifestyle, variety of activities in town
- Dual language immersion program
- FLEX program
- Opportunity for concurrent enrollment in college classes
- Technology 1 to 1 on devices
- Dedicated, caring staff, willing to go the extra mile
- Staff is focused on what is best for kids
- Experienced, stable teaching staff, very little turnover
- Students have access to many activities to pursue their interests
- Diversity
- Supportive, well-functioning, caring Board

## Needs/Critical Issues Facing the District

- Weather
- Lack of sufficient housing, expensive housing
- Big achievement gap
- High number of economically disadvantaged students
- Diversity could be greater some groups are underrepresented
- Funding is dependent on local factors
- District staff members "wear many hats"
- Teachers may not want to or be able to take on extra responsibilities

## Characteristics of New Superintendent

- Approachable
- Good communicator
- Transparent
- Empathetic
- Involved in school and community activities
- Experienced as teacher and leader
- Adaptable, able to change direction when need arises
- Good listener
- Innovative
- Bilingual preferred
- Team player
- Has experience in implementing safety plans

## Group G (10)

## Strengths of the District

- Diverse population
- Small district, personalized culture
- Community partnerships foundations, police, Cerro Coso College
- Staff has commitment to students
- Small class sizes
- Music program
- Dual language immersion program
- Ski program at all levels
- Sports programs are strong and high levels of participation, students can participate in multiple sports
- Professionals are passionate about helping students be the best that they can be

- Decisions about curriculum and instruction are teacher-driven, and decisions are studentcentered
- Support from community passing parcel tax and bond measure
- NOW foundation and Magic Mountain community foundation contribute a lot of money to schools
- Basic aid district, less dependent on state for funding
- Students can get AA degree at high school graduation
- AP Spanish program is stellar
- Middle school students visit Manzanar and Museum of Tolerance

## Needs/Critical Issues Facing the District

- Need to close achievement gap between English learners and English-only students
- Need earlier diagnosis of students with learning disabilities
- Addition students are in need of 504 plans
- Need more support for substitute teachers higher wages and more training
- Shortage of substitutes
- Many staff members are stretched too thin
- At middle school, students don't have P.E. every day
- Funding is an ongoing issue
- Cost of living is high
- Services for English learners need to be expanded
- Need more bilingual staff members
- Need more parent involvement
- Salaries for many positions need to be higher
- Parents need more information about classes at Cerro Coso College
- Need more deliberate outreach to Latino families
- Need equal opportunities for all students
- Challenge to make school calendar fit the needs of the community
- Attendance many students, especially Latino students, miss school near Winter Break
- Geography remote location impacts sports program

## Characteristics of New Superintendent

- Has integrity
- Has confidence
- Values transparency
- Flexible
- Bilingual preferred
- Community oriented, will engage with the community

- Visionary
- Collaborative
- Has been a teacher and a principal
- Strong instructional leader
- Values and appreciates the staff
- Humble
- Will attend and engage in activities with students
- Visible
- Will work closely with the college to develop new pathways for students
- Understands and has a growth mindset
- Will hold students accountable for behavior
- Will hold all adults accountable

## Group H (14)

## Strengths of the District

- Principals have good relationships with students who have problems
- Incorporation of athletics with academics
- Schools are safe and take precautions regarding safety
- Location of schools is convenient and compact
- It is easy for students to get additional help if needed
- Students get along with each other
- Good preparation for college and career
- Parent involvement is helpful

## Needs/Critical Issues Facing the District

- Students should be able to use smart phones for learning
- Drug activity is a problem
- Need to improve the quality of mental health services
- Only work that has not been completed should be given for homework
- Need more trust between teachers and students
- Some teachers are more passionate about teaching than others
- More student input needed on hiring teachers
- Students should have input on substitutes; need better quality subs
- Need better food
- Need longer lunch period
- Gym needs to be better maintained
- High school facility needs to be improved
- Rodent control problem

#### Characteristics of New Superintendent

- Must like kids
- Must be passionate about the job
- Should have mindset to help students with problems
- Should be brave and confident during a crisis
- Adaptable and flexible regarding red and yellow days
- Will meet with students
- Will be consistent and fair on behavioral issues
- Will supervise principals closely
- Has experience as a teacher
- Went to school in Mammoth
- Bilingual
- Will be hand-on helping students

#### Group I (4)

#### Strengths of the District

- Support from community though bond measure, parcel tax, foundations
- Dedicated staff
- Opportunity for concurrent enrollment at the college
- Students are well behaved and want to learn
- Teachers have become collaborative in planning instruction
- Board and superintendent are transparent
- High level of trust

#### Needs/Critical Issues Facing the District

- Need to continue looking intensely at data
- Need to listen to everyone in the community
- Communication need to reach out to Latino community
- Budget concern deficit spending
- Remote location, staff members tend to be isolated
- Difficulty getting substitute teachers
- Need to close the achievement gap
- Equity is a big issue

#### Characteristics of New Superintendent

- Needs to listen to everyone on management team
- Will focus on successes
- Will create a sense of interdependence we're all in this together

- Will hold all leaders accountable
- Loves kids, will put them first
- Good negotiation skills
- A great communicator, good listener
- Will maintain and build trust
- Strong budget background
- Strong background in curriculum and instruction
- Understands social-emotional needs of students
- Willing to have difficult conversations
- Accessible
- Knowledgeable about threat assessments, lockdowns, etc.
- Able to relate well to Latino families

#### MAMMOTH UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH WRITTEN INPUT FORM

The Cosca Group (TCG) has been retained by the Board of Education of the Mammoth Unified School District to assist in the search and selection process for the new Superintendent of Schools. If you wish to give your input, please complete the information requested below. Your input will be considered in establishing the qualities and characteristics required for your new Superintendent. The Board and The Cosca Group appreciate your input and thank you for your participation. This form should be completed and returned by January 24, 2019 in order to be presented to the Board of Education.

Please check your classification:

Certificated	Classified	Confidential	Management
Parent	_StudentC	Concerned Citizen	
Other (please	specify):		

1. What do you consider to be the greatest strengths of the Mammoth Unified School District?

2. What do you consider to be the greatest needs/critical issues facing the District?

3. What leadership qualities and characteristics do you wish to see in the new Superintendent in order to support the strengths and deal with the needs/critical issues indicated above?

Please return this form to the school office or the Office of the Superintendent in an envelope marked "Confidential Superintendent Search" at the

Mammoth Unified School District P.O. Box 3509 462 Sierra Park Road Mammoth Lakes, CA. 93546

#### Distrito Escolar Unified de Mammoth Búsqueda de un Superintendente

#### FORMA DE OPINIONES POR ESCRITO

El Grupo Cosca (TCG) (siglas en inglés) ha sido retenido por la Mesa Directiva del Distrito Escolar Unified de Mammoth para ayudar con el proceso de la búsqueda y selección de un Superintendente nuevo para las Escuelas. Si usted desea dar su opinión sírvase completar la información que les pedimos al pie de la página. Tomaremos en cuenta sus recomendaciones de establecer las cualidades y características que requieran en el nuevo Superintendente. La Mesa Directiva y el "TCG" aprecian sus ideas y agradecen su participación. La fecha de tope de esta forma es el 24 de enero, 2019, para ser presentada a la Mesa Directiva.

Por favor marque su clasificación:

Certificado	Clasificado	ConfidencialAdministrac	ión
Padre	Estudiante	Ciudadano Interesado	
Otro (por favor	especifique)		

¿Cuáles considera usted que sean las mayores fortalezas del Distrito?

¿Cuáles considera usted que sean las necesidades y asuntos más críticos que enfrenta el Distrito?

¿Cuáles cualidades y características de liderazgo desea usted ver en el nuevo Superintendente para poder respaldar las fuerzas y tratar con las necesidades y asuntos críticos indicados arriba?

Por favor, envíe este formulario a lo siguiente: La oficina del superintendente en un sobre marcado "Confidencial Búsqueda del Superintendente" –

Mammoth Unified School District P.O. Box 3509 462 Sierra Park Road Mammoth Lakes, CA. 93546

# A Proposal for the Selection of a Superintendent

Presented To:



Submitted By:



CORPORATE OFFICE 901 17<sup>TH</sup> STREET NE P.O. BOX 10045 CEDAR RAPIDS, IOWA 52402 PHONE: 319-393-3115 FAX: 319-393-6911 E-mail: molly@rayassoc.com Website: www.rayassoc.com CALIFORNIA OFFICE 1069 VIA GRANDE CATHEDRAL CITY, CALIFORNIA 92234 PHONE: 319-393-3115 FAX: 319-393-6911 E-mail: molly@rayassoc.com Website: www.rayassoc.com

## **Finding Leaders for America's Schools**

901 17th Street NE Cedar Rapids, IA 52402 Mailing address: P.O. Box 10045 Cedar Rapids, IA 52410 Phone: 319-393-3115 Fax: 319-393-6911 Email: molly@rayassoc.com Website: www.rayassoc.com

Ray and Associates, Inc.

November 24, 2020

Oak Park Unified School District ATTN: Ms. Barbara Laifman, President 5801 Conifer Street Oak Park, California 91377

Dear Ms. Laifman and Members of the Board of Education:

This letter is in response to a request regarding the need for our services to assist you in the search for a new Superintendent. We are confident the Board will be quite pleased with the services we can provide. We have been very successful in providing Superintendent search services for districts that are similar in terms of size, cultural diversity and geographic location.

As I am sure you are aware, the selection of Superintendent will be one of the most important activities your Board will perform. The Board's success in the search process will affect your school district's education program for years to come. It is extremely important to find the "right fit" for the District.

We are familiar with California as we have conducted successful Superintendent searches for Palos Verdes Peninsula Unified School District, Poway Unified School District, San Ysidro School District, Santa Clara County Office of Education, Albany USD, Berkeley USD, Pasadena USD, Sacramento City USD, East Side Union HS District and Emery USD, California. In the Western region we have conducted Superintendent searches for Balsz School District, Marana Unified School District, Paradise Valley Unified School District, Deer Valley Unified School District, Gilbert Public Schools and the Arizona School Boards Association, Arizona; Edmonds School District, Everett Public Schools, Granite Falls School District, Lake Washington School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J and Medford School District 549C, Oregon; Matanuska-Susitna Borough School District, Nevada; Blaine County School District, Idaho; Missoula County Public Schools, Montana; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; and Hawaii School of Deaf and Blind, Hawaii.

Nationally we have assisted Waterbury Public Schools, Greenwich Public Schools, Bridgeport Public Schools, Hartford City Public Schools and the Consolidated School District of New Britain, Connecticut; Wyandanch Union Free School District and Amityville Union Free School District, New York; Baltimore County Public Schools, Anne Arundel County Public Schools, Howard County Public School System, Wicomico County Public Schools and Prince George's County Public Schools, Maryland; Millcreek Township School District, Woodland Hills School District, Lewisburg Area School District, Wissahickon

School District, Millville School District, Montgomery County Intermediate Unit and Benton Area Public School District, Pennsylvania; Teaneck Public Schools, Paterson Public Schools, Trenton Public Schools, East Orange School District, Camden City Public Schools and Marlboro Township Public Schools, New Jersey; Dover School District, New Hampshire; Tangipahoa Parish School System, Louisiana; Lynchburg City Schools, Montgomery County Public Schools, Mecklenburg County Schools, Bedford County Schools, Newport News Public Schools, Hampton City Schools, Prince William County Public Schools and Williamsburg-James City Schools, Virginia; Savannah-Chatham County Public School System, Georgia; Maury County Public Schools, Knox County Schools, Oak Ridge Schools and Sumner County Schools, Tennessee; North Little Rock School District, Pulaski County Special School District, Rogers Public Schools, Cotter Public Schools, Mountain Home Public Schools and Fayetteville Public Schools, Arkansas; Marion County Public Schools, Hillsborough County Public Schools, Lake County School District, The School District of Palm Beach County, Florida State University Schools, Brevard Public Schools and Collier County Public Schools, Florida; Austin ISD, Plano ISD, Lewisville ISD, Fort Worth ISD, Killeen, ISD and Socorro ISD, Texas; Beaufort County School District, Jasper County School District and Richland County School District One, South Carolina; Cleveland Heights-University Heights City School District, Shaker Heights City Schools, Cincinnati Public Schools and Lorain City Schools, Ohio; Omaha Public Schools and Westside Community Schools, Nebraska; Lakeville Area School District, Minnesota; Dickinson Public Schools, Williston Public School District 1 and Fargo Public Schools, North Dakota; Vermillion School District, South Dakota; Grand Rapids Public Schools, Bloomfield Hills Schools, Benton Harbor Area Schools, Detroit Public Schools Community District, Ecorse Public Schools and Ann Arbor Public Schools, Michigan; Geary County Schools USD 475, Shawnee Mission School District, Lawrence Public Schools and Kansas City Kansas Public Schools, Kansas; Hickman Mills C-1 School District, Joplin Schools and Kansas City Public Schools, Missouri; Indian Prairie School District 204, Orland School District 135, Butler School District 53, Rock Island-Milan School District #41, Hazel Crest School District 1521/2, Glenbrook North and Glenbrook South High Schools, Joliet School District and Township School District #113, Illinois.

We have also assisted the Michigan Department of Education, Alabama Department of Education, Hawaii Department of Education, Colorado Department of Education, West Virginia Department of Education, Ohio Department of Education, Florida Department of Education, Rhode Island Department of Education and Wyoming Department of Education with their State Superintendent searches.

We are currently leading searches for Champaign Unit 4 School District and DeKalb CUSD 428, Illinois; Urbandale CSD, Iowa; Salt Lake City School District, Utah; Kingman-Norwich USD 331, Kansas; North Clackamas School District, Oregon; Greenburgh Central School District, New York, in addition to others across the nation.

We are a national search firm that is uniquely equipped to assist you in the selection of a Superintendent who meets your particular needs and qualifications. We will not only advertise, but also actively recruit potential candidates that will meet the criteria established by your Board, including women and minorities. Most other search firms do not seek out candidates for a position as we do for our clients. With our extensive regional and national associate base, Ray and Associates, Inc. will be able to recruit quality candidates from around the country, as well as within the state. We have often found excellent in-state candidates who would not otherwise have applied for the position due to a possible conflict of interest with a state or local firm. Our professional, objective procedures allow us to attract, process and screen the most successful candidates for a Superintendent position. You will also find our system is flexible, which allows us to customize the search to meet the desires of the Board.

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty-five (45) years. This year

the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients.

It is our goal to make the selection process professional, efficient and successful to assure your complete satisfaction with our services. It is quite common for a Board to be concerned about the quality of candidates who might be available in today's job market. Outstanding administrators will need to be recruited regardless of the time of year or the position needing to be filled because many of these school leaders already have good jobs. We feel that our firm can be very successful in attracting candidates that will meet or exceed your expectations. With a consulting firm of associates located nationwide, Ray and Associates, Inc. has been able to develop the most comprehensive pool of candidates of any executive search firm in the country. Our reputation for success is built upon providing school districts precisely the type of candidate that satisfies not only the Board but the community and faculty as well.

Ray and Associates, Inc. strives to provide the District with the best match possible based on what we learn in our extensive interaction with the Board and key players in the search. It is our desire to activate our network on your behalf to locate individuals that can effectively assume the top executive post in your District.

We welcome the opportunity to make a presentation of our services at your convenience. If you have any further questions or comments regarding the enclosed information, please do not hesitate to contact our Cedar Rapids office at 319-393-3115.

Sincerely,

Michael Collins President

## **TABLE OF CONTENTS**

#### **INTRODUCTION**

The Search	1
Brief Overview	1
Performance	1

#### **BACKGROUND INFORMATION**

Profile of the Firm	2
The Team	3
Key Associates for the Project	4

#### **SECTION I**

Consultant Services Provided	5
Working with Board Through Each Stage of Search	7
Inclusion, Equity and Elimination of Institutional Racism	8
Suggested Timeline	9
Building the Profile	.10
Interview Process - Community Input	.10
Recruitment	.11
Screening, Background Checks, Interviews and Final Selection	.12

#### **SECTION II**

Monitoring the Search Process	- Client Checkpoints	13
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#### **SECTION III**

Search Cost — The Complete Process	14
Cost Breakdown — Consultant Fee/District Expenses	14
Performance Contract	14
Estimated Cost Sheet	15

#### **SECTION IV**

General Provisions	
Confidentiality	16
Board Self-Assessment Survey	
Satisfaction Guaranteed.	16
REFERENCES	17
REFERENCES	1/
WHAT SCHOOL BOARDS SAY ABOUT RAY AND ASSOCIATES	19
RAY AND ASSOCIATES, THE CLEAR DIFFERENCE	20

#### Page

## **INTRODUCTION**

## **THE SEARCH**

This Proposal is an example of the quality of our work for a state, regional and national search. Our firm is committed to spending the time and energy on the details necessary to perform a proper search. *We actively seek out and screen all candidates who are recruited during the search to identify those who are superior and who meet or exceed the qualifications set by the Board.* 





## **BRIEF OVERVIEW**

This document is designed to demonstrate that we desire to provide you with a complete, detailed package customized to the Oak Park Unified School District in a performance contract regarding our professional services for your Superintendent search.

Our Proposal consists of our consultant services, general provisions, confidentiality, satisfaction guarantee and consultant cost.

## PERFORMANCE

We have developed highly effective procedures to assist schools, step by step, in selecting a Superintendent whose qualifications meet its criteria. This Proposal outlines the detailed procedures and steps that make our searches successful. *We have been highly successful in delivering outstanding candidates in all of our searches.* 

MISSION STATEMENT

#### Ray and Associates, Inc.

Leaders in Executive Searches

We will provide our clients with the highest quality services to assist them in hiring leaders who will meet District specific needs and positively impact the education of all students.

1

## HISTORY AND OVERVIEW OF THE ORGANIZATION PROFILE OF THE FIRM

Ray and Associates, Inc. is a professional organization that specializes in school executive leadership searches. The firm has been in the school executive search business since 1975 and has established an outstanding reputation. The firm has been recognized by The School Administrator journal as one of the top search firms in the country. Our professional consultants, including women and minorities, are persons with long-term experience in the school executive search field, with extensive backgrounds as school administrators, business executives, school board members, university professors and attorneys. All of the consultants within the firm have years of experience in the school executive search field.

Ray and Associates, Inc. is an independent and objective firm that does not accept placement fees from any candidate. We have designed a highly effective procedure that allows us to impartially assist schools in selecting the best individual for their particular needs.

In addition to our corporate office located in Cedar Rapids, Iowa, we have associates located throughout the country. Therefore, distance is not a factor to our firm when meeting with our clients.

The corporate office also maintains a full-time administrative staff to assist in the executive search business.

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty-five (45) years. This year the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients. We also have associates who are affiliated with the Council of Great City Schools, Urban Superintendents Association of America, the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE), as well as other professional organizations.

Exhibiting at state and national conventions allows the firm to meet and recruit outstanding administrators for our client districts. As a result, Ray and Associates has access to the most comprehensive pool of candidates of any executive search firm in the country.

It is only a matter of reality that outstanding administrators already have good jobs and need to be recruited. We are familiar with California as we have conducted successful Superintendent searches for Palos Verdes Peninsula Unified School District, Poway Unified School District, San Ysidro School District, Santa Clara County Office of Education, Albany USD, Berkeley USD, Pasadena USD, Sacramento City USD, East Side Union HS District and Emery USD, California. In the Western region we have conducted Superintendent searches for Balsz School District, Marana Unified School District, Paradise Valley Unified School District, Deer Valley Unified School District, Gilbert Public Schools and the Arizona School Boards Association, Arizona; Edmonds School District, Everett Public Schools, Granite Falls School District, Lake Washington School District, Snogualmie Valley School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J and Medford School District 549C, Oregon; Matanuska-Susitna Borough School District, Alaska; Clark County School District, Nye County School District and Lander County School District, Nevada; Blaine County School District, Idaho; Missoula County Public Schools, Montana; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; and Hawaii School of Deaf and Blind, Hawaii with their educational leadership searches. Our network and recruiting efforts are second to none. We bring a wealth of experience and knowledge to your District focused upon our goal to make the selection process professional, efficient and successful so we can state, without reservation, that you will be guite pleased with our services.



## **THE TEAM**

Ray and Associates, Inc. is a professional organization which specializes in the field of educational leadership searches. We are uniquely equipped to assist you in the selection of a Superintendent who meets the particular needs and qualifications of the Oak Park Unified School District. We have:

- 1. Highly trained and experienced staff that includes:
  - Active school administrative leaders
  - A balance of gender and minority representatives
- 2. Expertise and extensive background in:
  - The school superintendency
  - School administration at all levels
  - Private business, higher education and law
- 3. Experienced speakers at state, regional and national conferences.
- 4. Conducted workshops and seminars in school related matters such as:
  - Building the successful Board/Administrator relationship
  - Establishing an evaluation process that yields results
  - Interviewing for a Superintendent position
  - What Boards should consider when selecting a Superintendent
  - School district assessment
  - Effective hiring practices
  - Staff and organizational development
  - *Recruiting, selecting and retaining excellent teachers*
  - Enhancing school climate by shared decision making/dealing with special interest groups
  - Developing the compensation package or contract

3

## **KEY ASSOCIATES FOR THE PROJECT**

The following principal/project coordinators will be actively involved in working with the school district. The associates listed below will be assisting in recruitment, screening and background checks. The firm chooses various associates across the country to be sure that every region will be covered to recruit the best candidates for the Oak Park Unified School District. In addition, we have professional contacts throughout California, the pacific region and nationally. The following is only a partial list of associates who will be involved in the recruitment and screening of candidates. The firm will actually involve many more associates for the project.

#### **Mr. Michael Collins, President**

#### President/Columbus, OH

Mike is President of Ray and Associates, Inc. He oversees all searches conducted by the firm and will directly interact with Oak Park Unified School District and any committee that may be established on all details of this search. He has a Bachelor's degree in Secondary Education from Miami University and a Master's degree in Education from Ball State University. Mike has been a business owner for 37 years including a statewide education consulting firm. He is also a former two term city school district Board of Education member and a former two term elected State Board of Education member.

#### **Mr. Bob Mata**

#### Regional Search Associate/Cathedral City, CA

Bob serves our firm as a Regional Search Associate and background investigator and performs recruiting and screening of candidates. He earned his Ed.S, M.A. and B.S. from University of Colorado at Denver and has over 40 years of experience in the education field having served as a Teacher, Principal, Director, Chief Talent Management Officer and Superintendent.

#### Dr. Arthur J. (Skip) Roland

#### Regional Search Associate/Orange, CA

Skip serves our firm as a Regional Search Associate, team member and background investigator and as such performs recruiting and screening of candidates. He earned his B.A in Social Science and Psychology from University of California, his M.A. in Educational Administration from California State University and his Ed.D. in Educational Management from the University of La Verne. Skip has served as a Superintendent, Assistant Superintendent, Principal, Assistant Principal, Director of Human Resources and teacher in California for over 40 years.

#### **Dr. Ann Schultz**

#### Regional Search Associate/Westminster, CO

Ann serves our firm as a Regional Search Associate, team member and background investigator and as such performs recruiting and screening of candidates. She has a Doctorate of Philosophy from Marian University in WI, a Master of Science in Education from University of Wisconsin, and a Bachelor of Science in Communications and English from the University of Wisconsin. Ann has over 25 years of experience in the education field in Wisconsin having served as a Teacher, Principal and Superintendent. She is currently the Executive Director of the Cherry Creek Academy in Englewood, Colorado.

4

## **SECTION I**

#### CONSULTANT SERVICES PROVIDED FOR OAK PARK UNIFIED SCHOOL DISTRICT

#### **THE CONSULTANT WILL:**

#### **STAGE 1 - BOARD INPUT AND PREPARATION**

- 1. Provide all services as outlined in Sections I, II, III and IV.
- 2. Customize the search process to meet the needs and expectations of Oak Park Unified School District.
- 3. Conduct individual Board member interviews to assess the Board's priorities, goals and objectives to aid in the development of the criteria and qualifications for the Superintendent position.
- 4. Work with the Board to establish a timeline that lists each step in the search process.
- 5. Discuss with the Board the requirements and salary range for the Superintendent position.
- 6. Work with Oak Park Unified School District staff and those selected by the Board in the development of an accurate informational flyer and online application form. If desired, our office staff has the experience and capability to create the District's promotional flyer.

#### **STAGE 2 - PROFILE DEVELOPMENT AND PROCESS**

- 7. If desired, provide a proven consensus building mechanism for obtaining input from various constituencies, staff members, other stakeholders and the Board. In addition, our firm has the resources to offer an online survey option in many languages at no additional fee. We will provide a link to the survey to post on the District's website. The consultants will receive and organize all input data and then report the results to the Board.
- 8. Provide the Board with cost saving options to minimize expenses by utilizing Zoom, conference calls or gotomeetings to reduce paper copies, travel expenses and shipping costs.
- 9. Develop all required forms for the application and screening process.

#### **STAGE 3 - RECRUITING AND SCREENING**

- 10. Conduct all aspects of the recruitment process on a statewide, regional and national basis as follows:
  - Notify all associates to actively recruit potential candidates.
  - Contact individuals in our firm's database whose interests match District criteria.
  - Actively recruit applications from qualified individuals.
  - Solicit nominations from knowledgeable people in the profession.
  - Contact other professional consultants in private and public sectors.
  - Discuss with all candidates the District's characteristics and the Board of Education's profile and criteria for the new Superintendent position.
  - Advertise nationally in the following as selected by the Board: AASA Website, Education Week Newspaper and Website, Ray and Associates Website, the California Administrators and California Association of School Boards Publications, The School Administrator Publication, Executives Only Website, the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE) and other publications selected by the Board.

#### **STAGE 3 - RECRUITING AND SCREENING – CONTINUED**

- 11. Develop and manage the candidate screening process. All applicants are screened from the perspective of a viable match with District criteria to determine their capabilities, strengths and weaknesses. The search team thoroughly reviews each file and seeks alignment of qualifications with District expectations. Those who emerge successfully from this screening are deemed viable candidates.
- 12. Check references provided and conduct additional background investigation of top candidates. Our firm interviews each viable candidate that meets Board criteria and verifies their qualifications and experience. Our background research team then conducts extensive investigations on those individuals. The investigations go well beyond listed references and their current position. A complete check of a candidate's work history is also completed utilizing online resources such as Google, Yahoo, Facebook, Twitter and other social media sources as well as checking for blogs.

#### **STAGE 4 - CANDIDATE PRESENTATION**

- 13. Provide the Board with an opportunity to observe each top candidate interviewed with questions specifically designed by Ray and Associates, Inc. through video technology. This will allow Board members to get a better perspective of each candidate in order to determine which candidates to interview. By offering this opportunity, this will save the Board members on expenses and their time.
- 14. Provide an impartial and objective consensus building matrix instrument developed by Ray and Associates to assist the Board in determining the finalists for an interview. We have been extremely effective working with Boards who are divided on issues and candidates.
- 15. Assist the Board in establishing the interview format and in developing interview questions.
- 16. Determine and coordinate constituent and staff involvement in the interview process, if desired by the Board.
- 17. Help arrange the details of interviews for leading candidates.
- 18. Provide the Board with criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.
- 19. Coordinate with the Oak Park Unified School District Business Office the procedure for reimbursement of candidate's expenses.

#### **STAGE 5 - SELECTION OF FINALIST AND FUTURE PLANNING**

- 20. Assist District legal staff in negotiating the contract with the successful candidate at no additional cost to the District.
- 21. After the appointment, dispose of the files and send appropriate communications to the candidates not interviewed by the Board.
- 22. If desired, assist the District in preparing a press release, upon request, announcing the appointment of the new Superintendent.
- 23. Provide the Board with a report of the Board Self-Assessment Survey Results at no additional cost.

The Superintendent search services and process provided above can be adjusted to meet the specific needs of the Oak Park Unified School District.

## WORKING WITH BOARD THROUGH EACH STAGE OF SEARCH

**Stage One** is Board Input and Preparation. The firm will meet with each Board member individually to obtain input for the profile development and meet with the entire Board to set the timeline for the search, finalize procedures and services desired by the Board, establish the Board contact person(s), discuss the application process, set the advertising and determine the salary.

**Stage Two** is the Profile Development and Process. Our firm takes the development of the profile very seriously. We will meet with employees and stakeholders as identified by the Board. We also will hold morning and evening open forums to collect input from the community. The purpose of the interviews and meetings are to gather and organize information that will contribute to the development of an accurate profile for the position. The Board will have the opportunity to review our recommendations and make the final decision on the desired profile.

**Stage Three** of the process is Recruiting and Screening. The firm's dialogue with constituents and interviews with individual Board members, coupled with survey results, provide our firm with an accurate profile that is employed in the recruiting and screening of applicants.

**Stage Four** is Candidate Presentation. Ray and Associates will bring before the Board 8-12 top candidates for their consideration. Board members will have the opportunity to not only review the application packet submitted by each top candidate but they will also have the opportunity to observe each top candidate interviewed with questions specifically designed to the search through video technology. This will allow Board members to get a better perspective of each candidate in order to determine which candidates to interview. In addition to the top candidate packets provided to the Board, we will have available to the Board each and every completed file for their perusal if they so choose.

Upon the completion of the review, Board members will be asked to individually complete a matrix which allows them to assess each top candidate against the others. The Ray and Associates representative will then provide the Board with a summary of the individual Board responses. This summary assists the Board members in reaching consensus on which candidates are worthy of an interview. Following these steps ensures that all Board members have an equal opportunity to be involved in the selection process. Ray and Associates will assist the Board in establishing the interview format and in developing interview questions.

**Stage Five** is the Selection of the Finalist and Future Planning. At the conclusion of the last interview, the representative from Ray and Associates will once again be onsite to lead the Board through a similar consensus building activity which has proven to be very successful in assisting Board members to reach a final determination of their finalist(s). It is also requested by some of our client school boards that the top two (sometimes three) finalists are brought back to the District for an open forum with the public. We provide a proven process for this as well that includes a moderator. Questions from the audience are submitted in writing to ensure that the candidates are only asked about legitimate issues related to the position.

We believe strongly that this process allows the final selection of candidates to be in the control of the Board. When Boards are provided with a limited number of candidates from whom to consider, the Board has only limited involvement in the search process. Through the outstanding discussions fostered by the consensus building instrument provided by Ray and Associates, Board members have overwhelmingly been appreciative of their strong involvement.

## INCLUSION, EQUITY AND ELIMINATION OF INSTITUTIONAL RACISM

During these challenging times we articulate our organizational commitment to identifying and acting upon the changes that are needed to bring about inclusion, recognize the need for equity, and eliminate institutional racism.

We recognize social injustice, systemic racism, socio-economic limitations and the disparities associated with the identification and placement of school district leadership personnel. Furthermore, this recognition has not only guided our recruitment and placement of school district leaders, it directly impacts our recruitment and selection of our search Associates and national office personnel.

Therefore, we will:

- Declare inclusion as an organizational core value;
- Engage in intentional conversation and behavior around diversity and equity;
- Identify social justice as a behavior model impacting our school search practices;
- Recognize systemic racism as an equity problem for children's access to a fair, thorough and effective public education;
- Place equity, inclusion and diversity as major tenant of practice; and
- Use our voices and practices as instruments for change.

As a broad-based representative, nationwide organization that focuses on the delivery of leadership search and selection services to school districts, we commit ourselves to the statements above.

Additionally, we will continue to ask ourselves the appropriate questions that help us focus on the delivery of our respective services through the lenses of integrity, equity, social justice and inclusion.

Finally, we will continue to bring forward the organization's forces of institutional leadership, advocacy, scope of representation, levels of expertise and spheres of influence in these areas from this day forward.

#### Join us as we: WORK together, ASK questions, LISTEN fully, and ACT meaningfully!

## **OAK PARK UNIFIED SCHOOL DISTRICT**

## SUPERINTENDENT SEARCH SUGGESTED PROCESS AND TIMELINE

Items highlighted in yellow indicate an in-person meeting with the consultant(s)

	DATE	
Stage 1 Board Input & Preparation		Consultant planning meeting with the Board and individual Board member interviews. ( <i>Time: <u>TBD</u></i> ) (option to conduct via Zoom, conference call or gotomeetings.com)
	<u> </u>	Begin preparing information for the District promotional flyer and online application form with the District liaison representative(s).
		Notify all associates and other professional contacts of vacancy.
		Contact constituents and stakeholders for input meetings on
- Int		Online survey link, for input on developing the profile, available on District website from to
2 opm sss		Meetings with constituent and stakeholder group representatives.
Stage 2 Profile Development & Process		8 a.m. deadline for survey/input from constituents, stakeholders and Board members, including online survey.
ofile		Promotional flyer draft due.
- E		Board to finalize Superintendent profile for the promotional flyer and online application form. ( <i>Time: <u>TBD</u></i> ) (option to conduct via Zoom, conference call or gotomeetings.com)
3 ing		Print promotional flyer. Forward to consultant.
Stage 3 Recruiting & Screening		E-mail promotional flyer and online application instructions to interested candidates.
Rec Sci		Deadline for all application materials. (*See note below.)
Stage 4 Candidate Presentation		Consultant develops and finalizes interview questions and procedures with the Board. Top candidates are presented to the Board and consultant assists the Board in selecting finalists for the interviews. If desired by the Board, consultant will meet with constituents and staff interview group(s) to discuss their roles. <i>(Time: <u>TBD</u>)</i> Interview candidates (1 <sup>st</sup> round).
Ca Pres		Meeting with consultant following the last interview. <i>(Time: <u>TBD</u>)</i>
		Interview finalist candidates (2 <sup>nd</sup> round). <i>(Optional)</i>
Stage 5 Selection of Finalist & Future Planning		Final meeting with consultant following the last interview. <i>(Time: <u>TBD</u>)</i> (option to conduct via Zoom, conference call or gotomeetings.com)
		Consultant will discuss contract terms with the finalist.
Stage cion of ture Pla		Offer the contract.
– Futi		Press release of new Superintendent.
ه S		Board Self-Assessment Survey Results presented to the Board.

\*All applications will be reviewed. Materials received after the closing date may be given full consideration depending upon the number of applications received and other factors.

(Actual dates to be determined in the first meeting with the Board.)

## **BUILDING THE PROFILE**

Ray and Associates, Inc. firmly believes in parent, staff and community participation, especially in the development of an accurate profile for the position. Our firm takes developing the profile very seriously as the profile is the focal point of our recruitment efforts. We are eager to interview each Board member individually and visit with stakeholder groups who attend scheduled meetings. We will meet with any employees and other stakeholders as identified by the Board. Our firm also offers the opportunity for the community, staff and parents to participate in morning and evening forums that are organized to solicit input via the survey process and create dialogue by asking a series of questions related to the desired characteristics of the new Superintendent. The purpose of these meetings will be to educate them about the process as well as to gather and organize information that will contribute to the development of an accurate profile for the position.

In addition, for those stakeholders unable to attend scheduled meetings, our firm offers an online profile survey option with space for written comments/recommendations which is available in various languages at no additional fee. We will provide you with a link to place on the District website. Our office will maintain, collect and analyze all information received and include this in the report to the Board.

Our process consists of Q and A sessions and the administration of our own 33 Desirable Characteristics Survey. This is culminated in an open meeting report to the Board of our findings and recommendations. We will present a tabulated and analyzed graphic report in which Board members' and stakeholders' survey responses are reviewed looking for those characteristics chosen most in common by the various groups and indicate those recommended or those thought to be worthy of consideration. On some occasions, two of the items may be combined when they are closely related in context. Those items that seem to be important to some groups but not to others may be used in the recruitment of candidates and as questions during the interview process by the Board. At the encouragement of the consultants, many survey respondents will provide additional comments to the Board which are presented as a part of this report. Our dialogue with constituents and interviews with individual Board members, coupled with survey results, provide our firm with an accurate profile that is employed in the recruiting and careful screening of applicants. The characteristics most commonly selected will be used later in promotional materials.

## **INTERVIEW PROCESS – COMMUNITY INPUT**

Boards that have chosen the option to involve the public and employees during the interview phase of the search have found that we have been very effective in organizing this part of the process. Serious candidates who submit to being interviewed by personnel other than the Board itself are prepared for this by our consultants. Participants in these groups are requested to complete a "Candidate Impressions" form that is duplicated for each Board member's review and are requested not to rank the candidates.

It is also requested by some of our client school Boards that the top two (sometimes three) finalists are brought back to the District for an open forum with the public. We provide a proven process for this as well that includes a moderator. Questions from the audience are submitted in writing to ensure that the candidates are only asked about legitimate issues related to the position.

## RECRUITMENT

Ray and Associates, Inc. maintains a working relationship with key individuals at the college and university level along with other national public and private organizations for the purpose of recruiting outstanding candidates. However, we are not directly connected with any college, university or any other organization. This allows our firm to be extremely objective in the search process. We stay abreast of the performance of outstanding school administrators throughout the country, which has contributed to our high success rate.

Our firm maintains a very large pre-screened database of top candidates who are interested in new and challenging positions. The strengths and administrative skills of these potential candidates have been analyzed by the firm. However, it is important for our clients to know we are not a placement service that owes any favors to prospective candidates. Our professional objective is to aggressively recruit and advertise for the best candidate who meets the qualifications and characteristics of a Superintendent as set forth by the Board. Our recruitment process is very comprehensive, highlighted by the following steps:

- Largest recruiting network in the country
- Inform the firm's associates of the position and seek recommendations
- Advertise in local, regional and national venues known for high readership by school leaders
- Consult our extensive database for precise matches between District and candidate profiles
- Aggressively recruit successful school leaders who are not currently seeking a new position to invite them to consider the Oak Park Unified School District position
- Contact other organizations at state, regional and national levels regarding the position
- Proactively seek out potential candidates at state and national conventions



## SCREENING, REFERENCE CHECKS, INTERVIEWS AND FINAL SELECTION

Once recruited, all applicants are screened from the perspective of a viable match with Board criteria to determine their capabilities, strengths and weaknesses. The search team thoroughly reviews each file and seeks alignment of qualifications with Board expectations. Those who emerge successfully from this screening are termed viable candidates, and our background research team then conducts extensive background investigations and internet checks on those individuals. The investigations go well beyond listed references and their current position to include contacts with state associations and national leadership organizations such as American Association of School Administrators (AASA), Association of Latino Administrators and Superintendents (ALAS) and National Association of Black School Educators (NABSE). Our firm also checks current and past relationships with administrators and verifies candidate's education and work history utilizing multiple internet sites and social media feeds. We not only vet candidates extensively in their professional career, but it is also important for us to be familiar with their personal life as that can have an impact in their profession. The candidates who meet the qualifications selected by the Board become top candidates.

As part of the candidate presentation to the Board, Ray and Associates will bring before the Board 8-12 top candidates for the Board's consideration. Board members will have the opportunity to observe each top candidate interviewed with questions specifically designed to the Superintendent search through video technology. The Board will also have a chance to review the application packet submitted by each top candidate.

Upon the completion of the review, Board members will be asked to individually complete a matrix which allows them to assess each top candidate against the others. The Ray and Associates representative will then provide the Board with a summary of the individual Board responses. This summary assists the Board members in reaching consensus on which candidates are worthy of an interview. Following these steps ensures that all Board members have an equal opportunity to be involved in the selection process.

Ray and Associates will conduct criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees on the top 2-3 candidate(s) through an outside service at no additional cost.



## **SECTION II**

## **MONITORING THE SEARCH PROCESS - CLIENT CHECKPOINTS**

The Board's role is the most important one in the search process. Although we assist you in the process by actively recruiting, identifying and recommending qualified candidates, you alone will determine which candidate you will hire.

Our search process is set up in a manner that provides the Board with a continuous monitoring capability which features clearly defined checkpoints:

Timeline	•Establish a timeline for the process
Input	•Determine the input process
Qualifications	•Set the Superintendent qualifications
Flyers	•Review and approve informational flyers and application forms
Progress Reports	•Receive regular progress reports from the consultant
Interview Process	•Approve format and questions for the interview process
Candidates	•Select candidates for final interview
Hiring	•Hire the candidate
Contract	•Determine and approve the contract
Press Release	•Approve the press release

These check points assure that you know the progress of the search and have the information to be fully informed and in control of the search.

## **SECTION III**

## **SEARCH COST – THE COMPLETE PROCESS**

The cost of our Proposal is for a complete search. The Board will be guided and assisted by Ray and Associates, Inc. at every step in the search process from the initial phase of determining the desired qualities for the position through the actual hiring of the new Superintendent. Our process is flexible. If the Board desires a different approach or would prefer certain options other than those provided in our Proposal, we can adjust our process to meet your specific requirements.

## **COST BREAKDOWN**

**The Consultant Fee.** The base fee for the performance of the Superintendent search by the consultant as provided in this Proposal will be twenty thousand dollars (\$20,000.00). If the Board selects only certain elements offered in this package, or requests services not included in this package, our fees and reimbursed expenses will be adjusted accordingly. The firm will discuss any modifications relating to the search fee regarding our services at the formal presentation. The Superintendent search fee shall be paid in three (3) installments; 1/2 of total fee is due upon signing of the contract; 1/4 of fee is due at the time of the stakeholder meetings; and the final 1/4 of fee is due when the Superintendent is officially hired by the District.

We will provide the Board with criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.

There is no charge by Ray and Associates for the services to assist the Board in negotiating a contract with the new Superintendent and the development of the contract terms.

**Consultant Reimbursed Expense.** Certain expenses, including travel, lodging, meals, shipping, and other search related expenses will be kept to a minimum and are to be reimbursed by the District. Said expenses will be invoiced as they occur and will include a detailed account listing of such expenses.

**Candidate Expenses.** If the District determines to reimburse candidates for interview expenses, expenses may include travel, lodging and meals for the candidate and spouse. Candidates are to submit all receipts and expense documentation to a designated individual at the District and said expenses will be paid by the District as they occur.

**Cost Saving Expense Options.** Ray and Associates, Inc. is aware of budget concerns and therefore offers several cost saving options: 1) Conduct 3 meetings with our consultants via Zoom, conference call or gotomeetings, which could potentially save thousands of dollars in travel expenses; 2) Utilize our materials electronically (either via e-mail or a flash drive); and 3) Boards may conduct 1<sup>st</sup> round candidate interviews via Zoom to reduce candidate travel expenses. Once the Board narrows the candidates down to two or three finalists, the finalists will interview in-person with the Board.

## **PERFORMANCE CONTRACT**

Ray and Associates, Inc. will provide a written agreement between the Board and the consulting firm which will contain the provisions of this Proposal and any modifications or changes mutually agreed by the parties.

## **ESTIMATED** COST SHEET – PREPARED FOR: OAK PARK UNIFIED SCHOOL DISTRICT

Ray and Associates, Inc. will spend as much time as needed to conduct a successful search for the Oak Park Unified School District. Please Note: Our flat fee is inclusive of all services. The only hourly rates that would apply would be for requests above and beyond this Proposal and would be at the following rates:

Consultant \$100.00/hr Administrative Asst. \$25.00/hr

#### Travel

Flight	
Ground transportation (billed at \$0.575 per mile)	
Hotel (if needed for stakeholder meetings)	
Meals	
** Travel Subtotal	
**Expenses may be less if district utilizes local consultant or cost saving meetings.	,

<b>Shipping:</b> (Federal Express to the District, materials to search coordinator, candidate information after candidates have been selected from the screening process)	
Ray and Associates, Inc. Estimated Expense Total: Ray and Associates, Inc. Base Fee	
*ESTIMATED SEARCH COST *Does not include estimated advertising or candidate expenses for interviews.	\$23,200.00

\*\*The actual number of candidates interviewed is the Board's decision. The estimate per candidate for interview expenses is \$2,000; however, it is dependent on the candidate's geographic location. Candidate travel expense reimbursement is the responsibility of the District.

All expenses are estimates, based on past experiences. The Oak Park Unified School District will be billed for only the actual expenses incurred.

#### **Board Approved Advertising**

We exhibit advertising as a separate entity because the cost is based on the Oak Park Unified School District decisions on how extensive the need. Our associates make recommendations and the Board has the final authority on frequency and dollars spent. *(Estimated Advertising is \$5,000.00)* 

Ray and Associates, Inc. does not collect a commission for placing the ads.

## **SECTION IV**

## CONFIDENTIALITY

The nature of our work and our ability to carry out our responsibility to you is directly related and dependent upon our present and past experience in providing similar services to others. *The firm will preserve the confidential nature of any information which becomes available to the firm resulting from the services rendered to the Board.* 

As our client, you also need to maintain the confidentiality of information provided by Ray and Associates, Inc.

## FOLLOW-UP AFTER THE SEARCH: BOARD SELF-ASSESSMENT SURVEY FOCUS ON FUTURE PLANNING

Included in the base fee, the consultants from Ray and Associates, Inc. will spend time with the Board reflecting upon current Board governance procedures. In respect to governance and District initiatives, we have found that there is really no better time than very early in the tenure of a new Superintendent to assess issues and expectations.

ROUND 1: At the conclusion of the search, we will provide the Board with a link to an online survey concerning current District governance practices as well as key District challenges and opportunities for improvement. Assessment results are then analyzed and shared with the Board and the new Superintendent. The results can be emailed, presented in-person or via Zoom.

ROUND 2: About six months after the new Superintendent begins, we will provide the survey again to be completed by the current Board and the Superintendent. As in round one, at no cost to the District, the results will be analyzed and shared with the Board and Superintendent to assist with teambuilding every year thereafter as long as that Superintendent is in tenure.

Through the aforementioned process, we are afforded an in-depth view of your school district. As part of our presentation, we will also provide insight and suggestions for organizational improvements. Ray and Associates has developed several training/workshops targeted at increasing organizational performance and efficiency which may be of interest to your school district at this time of significant leadership transition. Our firm belief is the workshops/training can increase the effectiveness of both the Board and Superintendent, enhance their relationship, and provide for an optimum learning environment to improve student achievement.

## **SATISFACTION GUARANTEED**

We provide a termination provision in our contractual agreement with the Oak Park Unified School District. If the Oak Park Unified School District or Ray and Associates, Inc. terminate this agreement, the Oak Park Unified School District will be charged only for the work performed and expenses incurred up to the date of termination.

If the Board is dissatisfied with the new Superintendent within two years from the date of employment of the Superintendent and if either party dissolves that relationship by resignation or termination within a two-year period of the initial employment, the firm of Ray and Associates, Inc. will conduct a new Superintendent search at no cost to the District, except for expenses.

Furthermore, we do not recruit candidates we have placed for a minimum of 5 years.

## REFERENCES

We have chosen several clients from our past and recent search list to demonstrate that we have been successful in various geographic locations.

SCHOOL DISTRICT	LOCATION	CONTACT PERSON	TITLE OF CONTACT	PHONE NUMBERS/ E-MAIL
Grand Rapids Public Schools	Grand Rapids, MI	Kristian Grant	Board President	kristiangrant@12oakes.com Cell: 616-862-3928
Indian Prairie School District 204	Naperville, IL	Michael Raczak	Board President	mike_raczak@ipsd.org Cell: 630-421-0714
Hillsborough County Public Schools	Tampa, FL	Steve Cona	Board Member	Cell: 813-310-8557
Cleveland Heights- University Heights City School District	University Heights, OH	Jodi Sourini	Board President	Cell: 216-906-3556 j_sourini@chuh.org
Everett Public Schools	Everett, WA	Caroline Mason	Board President	Cell: 425-238-7308 caroline.mason@everettsd.org
Westside Community Schools	Omaha, NE	Adam Yale	Board Member	Cell: 402-672-2294 yale.adam@westside66.net
Waxahachie Independent School District	Waxahachie, TX	Dusty Autrey	Board President	Cell: 972-670-7121 dautrey@wisd.org
Berlin Area School District	Berlin, WI	Catherine Kujawa	Board President	Cell: 920-279-4657 ckujawa@berlin.k12.wi.us
Woodland Hills School District	North Braddock, PA	Jamie Glasser	Board President	Cell: 412-874-0161 glasja@whsd.net
Tangipahoa Parish School System	Amite, LA	Therese Domiano	Former Board President	Cell: 985-974-2955
Lawrence Public Schools	Lawrence, KS	Shannon Kimball	Former Board President	Cell: 785-840-7722 skimball@usd497.org
Pittsburg Community Schools USD 250	Pittsburg, KS	Marlene Willis	Former Board President	Cell: 602-404-8835 mwillis@usd250.org
Savannah-Chatham County Public Schools	Savannah, GA	Mary Davis- Brown	Board Secretary	Work: 912-395-1014 Mary.Davis-Brown@sccpss.com
Gresham Barlow School District	Gresham, OR	John Hartsock	Former Board Member	Cell: 503-780-4806
Mercer Island School District	Mercer Island, WA	David D'Souza	Former Board Chair	Cell: 206-202-0894 david.dsouza@mercerislandschools.org
Durham Public Schools	Durham, NC	Minnie Forte- Brown	Board Member	Cell: 919-452-2177 fortebrown.minnie@gmail.com

Council Bluffs Community School District	Council Bluffs, IA	Troy Arthur	Former Board President	Cell: 402-651-0956 Troyarthur4cb@gmail.com
Flagstaff Academy	Longmont, CO	Wayne Granger	Executive Director	Cell: 720-864-9094 wgranger@flagstaffacademy.org
Poway Unified School District	San Diego, CA	Michelle O'Connor- Ratcliff	Former Board President	District: 858-521-2704 moconnorratcliff@powayusd.com
Howard-Winneshiek Community School District	Cresco, IA	Clint Farlinger	Business Manager/Board Secretary	Wk: 563-547-2762 <u>cfarlinger@howard-winn.k12.ia.us</u>
Olathe Public Schools	Olathe, KS	Rick Schier	Former Board President	Home: 913-530-3644 rickschierboe@gmail.com
Joplin Schools	Joplin, MO	Jeff Koch	Former Board President	Work: 417-529-1236 jeffrykoch@hotmail.com
Austin Independent School District	Austin, TX	Vince Torres	Former Board President	Cell: 512-784-0620
Northshore School District	Bothell, WA	Amy Cast	Former Board President	Cell: 206-601-7909 Sbdistrict5@nsd.org
Des Moines Public Schools	Des Moines, IA	Dick Murphy	Former Board President	Cell: 515-250-5567 Hm: 515-278-6048 rmurphyia@earthlink.net
Maury County Public Schools	Columbia, TN	Jim Morrison	Former Board President	Wk: 615-350-7637 Cell: 931-446-2438 jcment@cpws.net
Brevard Public Schools	Viera, FL	Robert Jordan	Former Board Chairman	Cell: 321-698-7110 Work: 321-383-4813 <u>Robert.Jordan@genesisvii.com</u>
Collier County Public Schools	Naples, FL	Allun Hamblett	Former Deputy Chief Administrative Officer	Cell: 239-398-0761 <u>ARHAssociates@comcast.net</u>
Howard County Public School System	Ellicott City, MD	Brian Meshkin	Former Board Member	Cell: 949-812-0081 brian@brianmeshkin.com
Fargo Public Schools	Fargo, ND	Jim Johnson	Former Board President	Cell: 701-200-4794 Work: 701-232-7481 johnsji@fargo.k12.nd.us
Glen Ellyn School District 41	Glen Ellyn, IL	Erica Nelson	Former Board President	Work: 630-452-4349 npdnelson1@gmail.com
Paradise Valley Unified School District	Phoenix, AZ	Anne Greenberg	Board Member	Cell: 602-751-6642 Hm: 602-493-6642 <u>asgpvusdBoard@cox.net</u>
Manheim Township School District	Lancaster, PA	Hannah Bartges	Former Board President	Hm: 717-569-4484 jonbartges428@comcast.net
Willingboro Township Public Schools	Willingboro, NJ	Dennis Tunstall	Former Board President	Cell: 609-405-0242l Hm: 609-877-7056 <u>dennis.tunstall@comcast.net</u> <u>Dtunstall@wboe.net</u>

This is not a complete list, and more references can be provided upon request.



## "What school boards say about Ray and Associates"

"From the very beginning, they delivered professional, comprehensive services. The firm developed a rigorous timeline and met all its commitments. Ray and Associates, Inc. provided professional services in a consumer-friendly manner that allowed us to select a superintendent that will serve our community well."

May 20, 2020 Mr. Michael Raczak, Board President Indian Prairie School District 204, IL Enrollment: 27,400

"The quality of services provided by Ray and Associates cannot be understated and their ability to bring consensus among board members was phenomenal. While they provided support, they also respected our role as a board taking the lead in many aspects of the process. They were professional and knowledgeable throughout the entire process. I would highly recommend Ray and Associates to any School Board who wants to conduct a national search."

> Search completed January 2020 Mr. Steve Cona III, Board Vice Chairman Hillsborough County Public Schools, FL Enrollment: 220,000

"We chose Ray and Associates for our search based on their long successful track record and the individuals with whom we worked closely. Their in-depth knowledge of conducting a national search, large number of consultants through out the country, and strong recommendations from other boards put them at the top of the list after our search firm interviews. I am confident Ray and Associates and their team of consultants would do the same outstanding job for other school boards needing consultation in the hiring of a new superintendent."

> August 7, 2019 Ms. Caroline Mason, Board Vice President Everett Public Schools, WA Enrollment: 21,000

"Ray & Associates sat down with us to help develop what type of candidate we were in the market for and helped us to create a process that produced the most suitable candidate for the demographics of our district. Ray & Associates' professionalism was unparalleled as they worked alongside us to entertain all ideas, suggestions and opinions we had to aide in our search. They had a complete understanding and respect for our timeline, being expedient in deliverables. The Berlin Area School District Board of Directors is pleased to recommend the expertise of Ray & Associates and their seasoned team members."

> July 15, 2019 Ms. Catherine Kujawa, Board President Berlin Area School District, WI Enrollment: 1,600

"The Woodland Hills School Board had a very positive experience in working with the company to hire a Superintendent. The guidance and knowledge provided was invaluable, as was the depth and breadth of the search that was conducted. Ray & Associates, and Mr. Collins, were highly professional throughout our interaction. We appreciated your willingness to help us with the process that we wanted to employ, and to bring that process to fruition. Most importantly, you allowed the Board to choose from a strong pool of candidates and identify a leader that will continue our progress toward a stronger District that will benefit our kids."

September 16, 2018 Jamie Glasser, Esq., Board President Woodland Hills School District, PA Enrollment: 3,600

# ALL EXECUTIVE SEARCH FIRMS ARE NOT THE SAME!

Ray and Associates, Inc.

## THE CLEAR DIFFERENCE...

- ✓ We customize every search to meet the specific needs of our clients.
- ✓ We have the largest professional recruiting network in the country.
- ✓ We have a highly qualified, full-time staff that is readily accessible to respond to both clients and candidates.
- ✓ We maintain a large, prescreened database of traditional and non-traditional candidates from across the country.
- ✓ We aggressively recruit candidates who closely match the District profile.
- We provide an attractive, user-friendly and informative website that allows candidates to access application materials on-line.
- ✓ We receive more applications than any search firm in the nation.
- ✓ We interview each individual Board member in order for them to provide information and insight into the development of the profile characteristics for the position.
- ✓ We collect and organize community and staff input when desired by the Board and provide a report that is highly useful in establishing the position criteria. In addition, our firm offers an online survey in various languages and will provide a link to the survey to post on the District's website.
- ✓ We offer the option to have our office design and develop the promotional application and flyer for the position.
- ✓ We have the most complete and comprehensive investigative system to assure our clients of candidate quality.
- We have a unique and successful consensus building process for Boards who may be split on candidates or other issues.
- ✓ We have been highly successful in providing a large diverse pool of candidates in all of our searches.
- ✓ We provide an in-depth candidate video interview to the Board.
- We provide criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.
- ✓ We provide a two-year guarantee clause in our contract with our clients.
- ✓ We do not recruit candidates we have placed for a minimum of 5 years.
- We provide a service to our clients after the Superintendent is hired to ensure a smooth transition and to establish realistic expectations at the outset.

20

## PROVIDING DIRECTION FOR OUTSTANDING LEADERSHIP



SUPERINTENDENT SEARCH PROPOSAL

## **Oak Park Unified School District**

Oak Park, California

# BŴP

#### PROVIDING DIRECTION FOR OUTSTANDING LEADERSHIP

November 30, 2020

Office of the Superintendent Attention: Ragini Aggarwal, Executive Assistant to the Superintendent Oak Park Unified School District 5801 Conifer Street Oak Park, CA 91377

Via email: raggarwal@opusd.org.

Dear Ms. Aggarwal and Members of the Board of Education;

BWP & Associates is pleased to provide its proposal to assist you in your search for your next Superintendent of Schools. BWP & Associates is a national search firm that will provide you with an experienced search team composed of Dr. Kathleen Williams and Dr. Sheila Harrison-Williams, and Dr. Debra Hill contributing support as the Managing Director (resumes are attached).

Our team is committed to working together with you and your community to identify your specific needs in an inclusive process and to seek a group of excellent candidates for your consideration who will assist you in Educating Compassionate and Creative Global Citizens and to further your district's exemplary status in the State of California and nationally. We believe our professional backgrounds as former superintendents, assistant superintendents, principals, and teachers in diverse and similar-sized districts will be of benefit. Dr. Williams retired in the Chicago area from a district with a similar enrollment.

BWP & Associates consists of a team of experienced and dedicated consultants who are networked with educational leaders throughout the country. We offer a high level of expertise and extensive knowledge for recruiting exceptionally talented people for districts such as yours. Our proposal is attached and presents in detail how we will support you throughout your search process. As highlighted in our proposal, BWP has always offered a guarantee for our services and also affords the Board and the new superintendent mentoring services post hiring, if desired.

BWP &Associates appreciate the opportunity to submit the following proposal. We also encourage you to visit our website at www.bwpassociates.com to learn more about our search process and team members. Please, feel free to contact us if you have any questions or if we can assist further as you discuss your search options. We look forward to potentially interviewing with you on December 15.

Sincerely,

Dr. Debra A. Hill	Dr. Kathleen Williams	Dr. Sheila Harrison-Williams
Managing Director	Director	Director
847.204.046	630.795.9994	630.795.9994
drmomaka29@gmail.com	kathleenwilliamsconsulting@gmail.com	<u>hwsheila@gmail.com</u>

BWP & Associates 872 S. Milwaukee Avenue #221 Libertyville, IL 60048 708.361.4997 www.bwpassociates.com

PROVIDING DIRECTION FOR OUTSTANDING LEADERSHIP

## PREFACE BWP & Associates Statement on Executive Search Options During COVID-19 Pandemic

BWP

BWP & Associates, like many other firms and businesses, has had to learn new ways of working with clients and candidates. BWP continues to value the opportunity to meet face-to-face with Board members and stakeholders, we know that this is not always the safest and most effective way to work.

Over the past 6 months, BWP has expanded its capacity to work in the "virtual environment" with clients and candidates without any significant impact on our processes and effectiveness. Online meetings, breakout rooms, and virtual interviews have become more the norm than the exception. In the searches BWP has conducted since March 2020, we have received great feedback that our virtual approach works. Both clients and candidates give our consultants and the firm high marks for maintaining the integrity of the process and the quality of our personal interactions.

In working with Oak Park Unified School District, we are prepared to work with the Board to design a search process that is within local public health guidelines and maintains the safety of all participants. There are three basic options for you to consider:

Virtual Search: Using online tools to meet with Board members, stakeholders, and candidates.

**Hybrid Search**: Some interactions with Board members, stakeholders, and candidates are done in person, following public health guidelines. The remaining meetings and interviews would be conducted virtually using online tools.

**Traditional Search**: All components of the search would be conducted in person, adhering strictly to public health guidelines.

We believe that you can achieve results that thrill you using any of the models outlined above (or other creative models) so long as we maintain the integrity of the process outlined in detail in our proposal. Virtual and hybrid searches can lower the cost of a search by reducing travel expenses for consultants and, at times, candidates.

BWP & Associates 872 S. Milwaukee Avenue #221 Libertyville, IL 60048 708.361.4997 www.bwpassociates.com

## **Table of Contents**

1. Process Description & Costs	5-14
2. Search Timeline	15-16
3. Services	16-17
4. Stakeholder Interview Management Process	18
5. Candidate Recruitment Disclosure	18
6. Materials Samples	18-24
7. Experience References	25-34
8. Guarantee	34

## **PROPOSAL REQUIREMENTS**

The BWP team is highly capable of performing the scope of work outlined in your RFP, as we have been in business for over 14 years. We will personalize the search process specifically to meet the needs of Oak Park Unified School District's Board of Education and its community, especially in this time of limited community accessibility due to the international pandemic.

# 1. Detailed description of the process and all associated costs provided in an itemized format.

## A. Executive Summary of Process:

Over the last six years BWP has completed 143 searches of which 72 have been in medium-sized school districts such as Oak Park Unified School District. To help the Board of Education find the most qualified candidate for its school district, BWP will:

- maintain confidentiality when working on this search as the law allows. Such confidentiality refers not only to Board issues and conversations, but also regarding the need to secure and protect candidate information and conversations.
- assist the Board of Education (BOE) to navigate the search process and the challenges of the current pandemic. We offer a variety of effective strategies, both virtual and/or in person, that will be in compliance with California regulations and guidelines.
- Identify with the BOE a detailed and mutually agreed upon planning process including the designation of a district liaison, and timeline/schedules to conduct a successful superintendent search with a start date of July 1, 2021.
- post a notice of initial vacancy on the BWP website with general information about the school district and community.
- Solicit broad community input reflecting the diverse constituency in Oak Park to inform the hiring profile through stakeholder meetings (which may include students, teachers, staff, administration, parents, community/government leaders, business/education partners, and other citizens, for example, and as determined by the BOE).
- Manage stakeholder interview panel process to facilitate input into the profile creation process.
- Interview individual board members.
- Create and share reports regarding collected data/interviews/feedback with BOE.
- Develop a leadership profile based on the aforementioned data that reflects the qualities, characteristics, and strengths desired in the next superintendent of Oak Park Unified School District.

- conduct a national search that will include advertising the position broadly per BOE approval.
- implement a marketing and recruiting process with board approval that seeks a diverse pool of highly qualified and competent candidates from targeted districts with similar achievement and community context and who reflect the developed profile.
- develop and distribute recruitment materials to professional and state organizations and publications, such as AASA, ACSA, NASBE, ALAS, Education Week, etc. to market the position and encourage qualified candidates to apply per BOE approval.
- conduct personalized outreach to potential candidates who match the profile constructed and with appropriate backgrounds and experiences.
- provide guidance and support to the BOE in the development of a compensation package, if desired, that facilitates the successful recruitment and employment of the quality and experience of a Superintendent desired by examining standards and norms in the State of California and nationally with the assistance of the Assistant Superintendent, Business and Administrative Services.
- anterview candidates.
- advise, recommend, and present a slate of candidates to the BOE after a thorough vetting of candidates, including preliminary background checks, as well as degrees and credentials earned.
- assist the Board with the facilitation of the applicant screening process.
- assist the Board with the facilitation of the interview process.
- provide the BOE with rubrics, if desired, for screening and assessing candidates' strengths and limitations based on specific criteria identified in the developed profile.
- provide guidance regarding the conducting of community forums and interviews with the finalists, if desired.
- provide the BOE, if desired, research related to reaching consensus about a candidate.
- provide guidance regarding visits by BOE Members to the respective communities of the finalists, if desired, or offer an alternative approach to the final review process.
- bring successful closure to the search.
- if the new superintendent resigns or is dismissed for a cause within 12 months of commencing duties, BWP & Associates will conduct a new search at no additional cost excluding expenses to the Oak Park Unified School District Board of Education.
- provide mentoring/support for a year to the new superintendent and board, if desired, to assist with leadership success.

We believe one of the main advantages of our firm is that we do not "mass produce" searches. We will work closely with your BOE and community to conduct a search which fits the needs of your district and community. Our individual professional reputations are as important to us as our company's reputation. Therefore, you would be hiring not only our company, but individuals who

are committed to your success and view finding outstanding leaders for school districts as not a job, but a mission.

Finally, we think you will find that BWP's customer service is outstanding. From the moment you hire us, we give you our personal cell phone numbers. Any questions, concerns, or comments can be shared with us 24/7. BWP offers you the benefit of a national search and an extensive national network with the "up close and personal" attention you want when making a decision this important. We will vet the candidates we recommend to you at multiple levels to be sure we bring you individuals with integrity. We encourage you to check our references and are confident they will confirm our personal and professional approach to the search process. More information on our firm and its services can be found on our company website at <u>www.bwpassociates.com</u>.

### **B.** Detailed Process:

### **SCOPE OF WORK**

*BWP & Associates* proposes a multi-phased search for outstanding candidates for the position of Superintendent of Schools. Most searches extend over a period of 12-16 weeks (*refer to sample recommended timeline pages 15-16*)

At the onset, BWP consultants will confer with the Board of Education to establish BOE control of the search. This will be done by:

- 1. Reviewing BOE/consultant responsibilities for each phase of the search.
- 2. Determining the role of the current superintendent, staff members, administrators, students, district residents, and other stakeholders in the search process.
- 3. Preparing a customized detailed search calendar that meets the BOE's specific needs.
- 4. Considering BOE options and preferences for a position announcement and advertisement.
- 5. Discussing the compensation package to be offered to the new superintendent.
- 6. Agreeing upon a communication plan to keep the BOE and community abreast of the search progress, and the consultants alerted to questions or issues that may arise.

Our consultants will provide counsel to the Board of Education about all phases of the search process including media relations.

### a) Engaging School System Stakeholders

The BWP process honors and respects the perspectives of all of Oak Park Unified School District constituents, including Board of Education (BOE) members, employees, students, parents, community leaders, business leaders, and taxpayers. Each stakeholder and stakeholder group provide valuable data for the development of the unique selection criteria for the district. BWP uses this input to conduct a community audit and create a Leadership Profile that becomes the basis for evaluating and developing screening tools to evaluate applicants. It is also used for the writing of interview questions used by the consultants, the BOE, any stakeholder groups, and the rubric used by the BOE to measure each candidate's fit for the Oak Park Unified School District superintendency.

To engage stakeholders, the consultants propose the following activities:

- 1. Individual interviews with each member of the Board of Education to determine the desired qualifications, experiences, and personnel qualities of the ideal candidate.
- Targeted stakeholder focus groups with alike groups (students, parents, teachers, other employee groups, business leaders, governmental leaders, faith-based leaders, and other groups identified by the BOE. Because of the size of the school system and its unique demographics, it is recommended that these groups be held virtually over and include equity-based outreach efforts.
- 3. An online survey open to all stakeholders in Oak Park School District to open the process to all members of the school community. The BWP instrument is simple to administer, inexpensive (\$250 \$500 depending upon the number of languages you choose to offer it in utilizing district staff), and takes 5 minutes or less to complete.

Stakeholder qualitative and quantitative engagement data are used by the consultants to create the unique community audit and Oak Park Unified School Districts Leadership Profile. The Profile is the foundational piece of the search and will be applied throughout the process by the consultants and BOE to identify the candidate best qualified to serve as your next Superintendent.

As a matter of best practice, BWP recommends that the BOE consider sharing the survey results and Leadership Profile with all stakeholders. In doing so, the BOE adds transparency to the search process and builds support for your new Superintendent.

### b) Job Description and Recruitment Information

BWP consultants will work with the BOE to review and revise any existing Superintendent job description. It is our belief that it is important to clarify and prioritize the scope of the job as the school system transitions to a new leader.

### For job description and recruitment information samples, please refer to section pages 22-23.

### c) Advertisement and Recruitment Materials

*BWP* & *Associates* makes deliberate decisions to market a position to maximize the number of qualified applicants.

BWP offers a national reach to find a group of excellent candidates for your consideration, with emphasis on your geographic region. *BWP & Associates* does not maintain a "bench" of candidates. Since each search is tailor-made for the district and its unique needs, we aggressively recruit candidates whose experiences, skill set, and educational background best matches the needs of your position and community.

Announcement of the vacancy will be drafted for BOE approval and then posted, as directed by the BOE, in thoughtfully selected national, state, and regional publications and websites, as well as the *BWP & Associates* website (<u>www.bwpassociates.com</u>). BWP consultants also contact our national network of professionals to identify prospective candidates. A complimentary Internet link from our

vacancy announcement and search profile will be provided to your school district website, if you desire.

Once candidate recruitment is launched, *BWP & Associates* utilizes a wide array of effective strategies to identify stellar candidates for the position.

- Our experienced and committed consultants are networked with educational leaders, as well as college, university, and business leaders, throughout the country.
- *BWP* team members are active in state, regional, and national educational organizations, and many participate in superintendent academies to train current and future superintendents.
- Our firm is not associated with any college university, or organization. Therefore, we are highly objective in the search process.
- Our consultant roster includes many successful current or retired superintendents who offer a high level of expertise about the role of a superintendent.
- Over the years, BWP has learned the most effective and efficient sites to advertise positions. We seek broad exposure to ensure a strong, experienced, and diverse applicant pool.

### d) Application Screening and Interview Process

At the close of the application deadline, the consultants will carefully review all candidate materials.

- 1. Applicants are screened using the Leadership Profile developed by the BWP consultant team and approved by the BOE.
- The top applicants are interviewed by the BWP consultant team, using questions directly tied to the Leadership Profile and candidate responses are assessed against that tool as well. Until applicants are presented to the BOE, their materials remain the property of BWP.
- 3. After the BWP team completes its interviews, the candidates that best match the Oak Park School Distric's Leadership Profile will undergo further background and detailed reference checks by the search team.
- 4. After vetting all applicants, BWP presents, in an Executive Session with the BOE, a slate of candidates recommended for initial interviews by the BOE. The number of candidates in the slate typically includes four to six highly qualified school leaders. Our presentation includes a summary report on all the applications, and a profile for each of the candidates, including qualifications, critical leadership experiences, the professional and personal qualities that match the candidate profile, and statements about the candidate's past performance and personal integrity. The application materials provided become property of the BOE and are shared through a secure electronic platform.
- 5. After the candidate slate is presented, the consultants support and assist the BOE in the final stages of the process, including:
  - o Scheduling candidate interviews with the BOE.
  - Preparing the BOE for candidate interviews by providing written interview guidelines, suggested questions, protocols, and consensus building tools.
     BWP consultants typically do not attend Board interviews with candidates to

allow the BOE full ownership of this process. We will, however, be available to the BOE during the candidate interviews to answer questions and provide procedural guidance.

- Preparing any stakeholder groups for candidate interviews by providing written interview guidelines, suggested questions, protocols, and feedback instruments. If requested, BWP consultants will facilitate any stakeholder meetings with candidates.
- Discussing a BOE visit to the community(ies) of the preferred candidate(s), if desired or establishing "A Day in the District" for semi-finalist candidates to learn more and become exposed to the District and community.
- o Suggesting stakeholder events and activities appropriate to introduce finalists, if desired.
- o Providing any support the BOE needs to ensure a successful closure of the search.

### e) Background Verification

Oak Park Unified School District has comprehensive tools to verify that employees have not been convicted of crimes that would make them ineligible to work in a school system. This, however, is a baseline and does not provide a full picture of a candidate.

The BWP vetting process of finalist candidates' backgrounds is discrete and rigorous, reaching personal and professional references well beyond those provided by the candidate. Our ability to provide considerable information about the candidate beyond that appearing in the official file is attributable to the breadth of our professional relationships built throughout the country with educational leaders, university professors, board members, and professional organizations. We conduct an extensive electronic candidate internet research process, including social media and search engine scans, to provide insight into each candidate's public "digital footprint".

### f) Confidentiality

Maintaining confidentiality throughout the search process is essential to recruiting a strong applicant pool and protecting the BOE's role in the hiring of the Superintendent. At BWP, we adhere to strict guidelines and all applicable state laws to maintain the confidentiality of candidates and the BOE. For Oak Park Unified School District we propose:

- All applications are made through BWP, and are, therefore, BWP property. This ensures that the candidate information remains confidential.
- Any and all communication from BWP consultants to stakeholders is reviewed and approved by the BOE or its designee prior to distribution.
- The Board identifies a single point of contact for all communication about the search with stakeholders and the media. BWP consultants will never speak with the media without prior authorization from the BOE.
- BWP consultants will guide the Board through the search process in compliance with all California laws.
- BWP recommends that the BOE utilizes Executive Sessions when consultants present its candidate slate to the BOE, during the interview of candidates, and during deliberations involving their merits. By maintaining the confidentiality of the candidates, the BOE will

gain greater access to a stronger pool of applicants. Your next Superintendent is most likely already successfully employed in another community.

### g) Reports & Recommendations

BWP & Associates believes that a strong, proactive communication plan between its consultant team, the BOE and the community promotes transparency and results in a more successful outcome. To that end, the consultants shall provide:

- Frequent updates to the BOE President throughout the search process. The volume of these reports may increase as the search moves closer to its conclusion.
- A written summary reporting data from the BOE interviews, stakeholder focus groups, and the online survey of stakeholders. Raw data will be shared in an appendix.
- A verbal and written summary of each individual presented to the Board as a part of the candidate slate.

### C. Costs

The Consulting Fee for this search will be \$18,500.

The district will be expected to absorb the travel costs for candidates for the initial and final Board interviews if the Board would like to interview candidates in person. An estimate of these expense costs would depend on how many candidates the Board chooses to invite for interviews and the distance and method of their travel to the district.

Other possible expenses incurred by the district would be the costs for any refreshments or other food that may be served at any small group meetings during the community engagement process and the costs for any public reception or other activity that the Board may decide to host to introduce the finalists to the community. These activities are optional and would be arranged by the district staff with input from the Board and consultants.

In addition the following is a breakdown of potential and estimated costs:

•	Administrative support	2,800.00
•	Materials/supplies	150.00
•	Office & Technology	875.00
•	Online Survey Cost (2 languages)	500.00
•	Consultant Travel/Expenses, <b>if required*</b>	6,000.00* *maximum

• Posting fees for advertisements in state and national publications based on recent information and may be subject to change. Advertising and postage expenses will be required to distribute information regarding the vacancy. Further, the following options, if incurred, will be billed directly to the Board from the publisher or through the Firm and are in addition to the above consultant fees and expenses.

• Please note that you do not have to advertise in all of the national and regional outlets presented. A specific advertising plan designed to meet Oak Park Unified School District needs with specific content and costs would be submitted for the approval to the Board or the Board's designee prior to any ads being placed.

### **DRAFT** Advertising Plan and Cost Estimates for Search

Education Week Costs: \$450 per 30 day block on website (Ads have to be purchased in 30 day blocks.) Dates: Online Costs for Ed Week: \$900	
AASA - American Association of School Administrators Costs: \$649 for 45 days (Ads have to be purchased in 30 day blocks.) Dates: Online Costs for AASA: \$649	
ASCD - Association for Supervision & Curriculum Development (ASCD) Costs: \$325 for 30 days (Ads have to be purchased in 30 day blocks.) Dates: Online Costs for ASCD: \$325	
NABSE - National Association of Black School Educators Costs: \$250 per 30 day block on website (Ads have to be purchased in 30 day blocks.) Dates: Online Costs for NABSE: \$250	
ALAS - Association of Latino Administrators and Superintendents Costs: \$250 per 6 week posting on website and social media Dates: Online Costs for ALAS: \$250	
CASA - California Association of School Administrators Costs: \$ days (Ads have to be purchased in 15, 30, or 60 day blocks.) Dates: Online and possibly in print journal Dates projected: Online Costs for CASA: \$200, \$300, or \$550	
BWP Website Costs: Online website posting - no cost Approved: for length of search Dates projected: Online Costs for BWP: none	

### **Milestones and Payment Schedule**

Our consultant fee is normally billed in three equal installments:

Payment 1: Upon completion of signed contract / Letter of Understanding\*
 Payment 2: Upon completion of presentation of recommended candidate slate to the Board
 Payment 3: Upon appointment of the new superintendent

Expenses will be forwarded to the Board as they are incurred. Final expenses are billed within 90 days of completion of the search.



December 2020

#### DRAFT Letter of Understanding

The Board of Education of Oak Park Unified School District, California (hereinafter "Board") and *BWP & Associates* (hereinafter "Consultants") agree as follows.

1. Representing *BWP & Associates* as the Consultants, Dr. Kathleen Williams and Dr. Sheila Harrison-Williams will manage the superintendent search.

2. The Consultants will secure information about the District by gathering data from interviews with each member of the Board and any other person or groups the Board so directs. Consultants will share with the Board their findings as to perceived strengths of the District, peoples' perceptions of issues facing the District, and qualifications those interviewed believe are important in a superintendent.

3. The Consultants will draft an advertising fact sheet describing the vacancy for Board review; the draft shall be approved by the Board and/or search liaison prior to publication.

4. The Consultants are directed to advertise the vacancy in regional and national publications where no charges are incurred. The fact sheet will be published on *BWP & Associates*' website with a complimentary Internet link to your school district website.

5. The Consultants will work with the Board to establish a timeline for each step of the search process.

6. The Consultants will actively recruit qualified candidates to apply for the position and solicit nominations from knowledgeable people in the education profession.

7. The Consultants will gather data on candidates applying for the position. Those candidates best matching the desired profile will be interviewed by the Consultants to ensure they meet the required criteria. Within ten days of the closing of applications, the Consultants will present a list of candidates for Board consideration. References of recommended candidates will be checked by Consultants.

8. All documents produced and received by the Consultants will remain the property of *BWP & Associates*. The Consultants shall turn over to the Board copies of all documents relating to candidates recommended by *BWP & Associates* at the time the recommendation is made. With respect to this search, the Board will receive a copy of all documents sent out on behalf of the Board.

9. The Consultants will inform the Board and other groups, if appropriate, on items related to search protocols, establishing an interview format, developing interview questions, interviewing candidates, conducting site visits, and other matters related to the search process. The Consultants will be available during the search process to advise the Board on search related issues.

10. The Consultants will make salary and compensation package recommendations to the Board, if requested.

11. The fee for these consulting services will be \$18,500 plus expenses. These expenses include development of advertisements, creation and maintenance of candidate files, clerical expenses, communications to those in the network and to prospective candidates, postage, telephone/fax/copying/shipping charges and consultant travel/housing/meals. Consultant travel expenses will be forwarded to the Search Committee or liaison and/or District Financial Officer as incurred. The total amount for fees and expenses will not exceed \$28,875 as listed on the attached fee analysis.

Other additional anticipated expenses are travel costs for candidates and costs associated with travel for the Board if it desires to visit school districts of finalists. It is the Board's responsibility to reimburse candidate interview expenses, such as travel and hotel accommodations, as arranged. In order to maintain confidentiality, these candidate expenses will be reimbursed by BWP as incurred and invoiced to the District. A form will be used by BWP & Associates for this reimbursement process.

There may also be additional expenses for the search related to specialized advertising and recruitment if desired by the Board. Advertisements in appropriate fee based regional and national publications and websites are estimated at \$2,300 to \$3,000, depending on size, number of advertisements, and where placed. If desired, recommendations and cost estimates will be provided to the Board by the BWP consultants. These costs are not included in the Consultant fee and will be billed directly from the printer, publisher, website, or through the Consultants.

12. As elements of the process and included in the search fees, Consultants will: attend and conduct a planning session; conduct interviews and focus groups; present the results of the community audit and candidate profile for Board approval; conduct initial candidate interviews; present a slate of recommended candidates. At the Board's request, Consultants can be available for additional services such as accompanying the Board on site visits to candidates' communities, being present with the Board during the candidate interview process, additional press conferences or conducting special team building and/or planning sessions with the new superintendent. Such additional days will be billed at the rate of \$500 per day plus expenses per consultant.

13. The Consultants' fee will be billed in three installments, the first after the signing of the Letter of Understanding, the second after the presentation of the slate of finalist candidates, and the third upon appointment of the new superintendent. Expenses will be forwarded to the Board as they are incurred.

14. Candidate and Consultants' final expenses will be billed within 90 days of completion of the search.

15. The Consultants agree to comply with all relevant federal, state, and local legal requirements, as well as applicable District financial policies and procedures.

16. As the eventual decision to hire the candidate will be the Board's, the Board hereby agrees to release and waive any claims against the Consultants arising out of any decision the Board makes in the employment process relative to the hiring or failure to hire of any candidate(s) recommended by the Consultants, except any claims arising out of the Consultants' negligence, breach of this agreement or breach of any duty imposed on the Consultants by law.

17. If the Board is dissatisfied with the Superintendent selected within 24 months from the date of employment of the Superintendent, and if either party dissolves that relationship by resignation or termination within a one-year period of initial employment, and the Superintendent selected was one of the slate of candidates recommended by *BWP & Associates*, *BWP* agrees to conduct a new Superintendent Search at no cost to the District except for expenses.

18. BWP and Associates will not recruit the selected candidate for a period of five years for another position for whom the firm is conducting a search.

19. Upon execution of this Agreement, the Consultants shall commence services.

This Letter of Understanding constitutes the entire agreement between the parties with respect to its subject matter and supersedes all prior agreements, negotiations, representations, or communications relating the subject matter.

Approved:

(Date)

Oak Park Unified School District

BWP & Associates, Ltd.

President, Board of Education

Managing Director

### 2. Timeline for the Process

### **DRAFT** Recommended Timeline

#### January 2021

#### Search Planning and Preparation

In a meeting with the Board or its representatives, we will customize your search.

- Establish search parameters
- Set timeline
- · Identify any customized services to be provided

#### January 2021

#### Launch Initial Candidate Recruitment Efforts

- Implement marketing campaign, including advertisements with professional organizations/publications
- Post position on proven websites
- Open electronic, web-based application system
- Contact highly successful school leaders, with experience, background, and talents that match Oak Park Unified School District

### February/March 2021

### **Conduct Audit and Develop Leadership Profile**

- Interview Board Members
- Launch survey for stakeholders
- · Interview constituent groups identified by the Board
- Analyze data and provide reports to Board
- Present and verify recommended profile to Board

### March 2021

#### **Review and Evaluate**

Consultants will evaluate all applications using the lens of the Oak Park Unified School District Leadership Profile.

- Assess qualifications of applicants
- Identify the most qualified candidates who best match the Oak Park Unified School District Leadership Profile for interviews.

#### **March 2021**

#### Screen Candidates to Identify those for Board Interviews

- Interview applicants who best match candidate profile
- Conduct extensive research into each candidate's background, including online profile and professional references and contact others who may be knowledgeable about the candidate (the school district must also conduct a criminal background check for final candidate prior to employment)

### March/April 2021

### Present Candidate Slate to Board of Education

- Provide a summary of each candidate's and qualifications
- Highlight qualifications and "fit" for Oak Park Unified School District

### March/April 2021

### Prepare Board of Education to Interview Candidates

- · Identify key questions to ask and rubrics to evaluate and rate responses
- · Review what is and what is not permissible in an interview
- Discuss strategies for building consensus around finalists

### **April 2021**

### **Board Interviews Candidate Slate (5-7 candidates)**

### **April 2021**

### Board Interviews Finalists (1 – 3 Candidates)

- Create tools and instruments for Board interviews of finalists
- Determine the process and schedule
- Provide strategies for building consensus around a choice

### April/May 2021

### **Employ New Superintendent**

- Onboarding support (contract discussions, transition planning)
- · Presentation to staff, students, and stakeholders

### 3. Services

The following services were addressed and included and in the above Process section of this proposal.

### 3.1 Assist Board with the development of a hiring profile that is informed by Oak Park USD stakeholders which may include teachers, staff, students, board members and/or community members.

*Please reference Scope of Work section a) Engaging School System Stakeholders pages 7-8 for more details.* 

### 3.2 Assist Board with local and/or national advertising of the position.

Please reference Scope of Work section c) Advertisement and Recruitment Materials pages 8-9 & 1C Advertising Plan and Cost Estimates for Search page 12 for more details.

# 3.3 Assist Board with local and/or national recruitment of high quality applicants that match the established profile.

*Please reference Scope of Work section d) Application Screening and Interview Process pages 9-10 for more details.* 

# 3.4 Assist the Board with the facilitation of the applicant screening process.

*Please reference Scope of Work section d) Application Screening and Interview Process pages 9-10 for more details.* 

### 3.5 Assist the Board with the facilitation of the interview process.

*Please reference Scope of Work section d) Application Screening and Interview Process pages 9-10 for more details.* 

# 3.6 Conduct preliminary background checks including degrees and credentials earned.

*Please reference Scope of Work section e) Background Verification page 10 for more details.* 

# 3.7 Solicit community input to inform the hiring profile through at least six (6) to eight (8) stakeholder meetings.

*Please reference Scope of Work section a) Engaging School System Stakeholders pages 7-8 for more details.* 

# 4. Management of a stakeholder interview panel process to facilitate input into the decision making process.

BWP provides input of stakeholders as highlighted in the detailed Scope of Process through completion of surveys and focus groups. If the Board of Education desires additional input from its stakeholders, a potential day in the District may be offered with the final candidates. BWP can provide a template to the Board to facilitate that process and a sample feedback form, if desired.

# 5. Description of the procedure Consultant will use to disclose to the District prior recruiting/searches involving any candidate that is screened.

If BWP has had prior recruiting contact with any proposed candidates for Board consideration, that information will be disclosed when a candidate slate is presented to the Board.

# 6. Samples of related materials (advertising, survey forms, reports, etc.).

Samples of the following reports are provided on the following pages of this proposal:

- Report 1: Community Engagement Survey
- Report 2: Sample Vacancy Announcements/Advertisements

### **Report 1: Community Survey Example**



### School District

### Superintendent Search Survey

The DeKalb County School District Board of Education has launched a search for a new school superintendent and wants to know your thoughts. Please share your ideas by completing the survey below by \_\_\_\_\_, 2019. Thank you for completing this survey and helping with this very important task.

1. Select from the list below the three most significant strengths of the

DeKalb County School District.

- **Supportive community**
- Excellent teachers and staff
- Size of district
- Location of district
- Available resources
- Good school facilities
- **Supportive parents**
- Reputation of district
- Financial management
- Technology
- Effective leadership
- Curriculum
- Educational options and programs
- Enter an answer choice

### 2. Select from the list below the three most important leadership skills you would like a superintendent to have:

- Communication skills
- Instructional skills

□ Managerial skills



Financial skills	

- Organizational skills
- □ Interpersonal skills
- Public relations skills
- **3.** Select from the list below the three most important characteristics you would like a superintendent to exhibit:

Commitment to the community
Enthusiasm
Integrity
Good judgment
Innovation
Team builder
Change agent
Risk taker
Negotiator
Peacemaker

□ Visionary

### 4. For each of the items below, indicate whether you believe the item is either extremely important, important, or not important in the new superintendent:

	extremely important	important	not important
Doctorate degree			
Experience as a superintendent with a proven record of success			
Experience as a superintendent in a district of similar size			
Experience as an assistant superintendent			
Experience as a district level administrator			

extremely important

important

not important

Experience as a principal

Experience as a classroom teacher

Experience in finance

Experience in personnel

Experience in instruction

Experience in facility construction and management

Experience with technology

Experience in a multi-cultural environment

Experience in strategic planning

Experience in the Southeast

- 5. What do you consider to be the three most important issues or concerns facing the DeKalb County School District in the next five years?
- Community relations
- Curriculum
- Growth
- Facilities
- Funding
- Educational options and programs
- □ Instruction
- Personnel

Technology



#### 6. Please indicate all which apply to you:

- I live in the DeKalb County School District attendance area.
- My children attend schools in the DeKalb County School District.
- My children attended schools in the DeKalb County School District.
- I am a student in a school in DeKalb County School District.
- I represent a current non-child household.
- I volunteer in DeKalb County School District.
- □ I am retired.
- I hold an elected political office.
- I am employed by DeKalb County School District.
- I am not employed by DeKalb County School District.

#### 7. If you are employed by DeKalb County School District, please specify your position:

- Teacher
- Administrator
- Other certified staff
- Support staff (includes secretary, instructional assistant, custodian, bus driver, food service, maintenance)
- C Other

Thank you for completing this survey. The results will be shared with the DeKalb County School District Board of Education by the BWP consultants assisting with the search for DeKalb's next educational leader.

If you have further comments you would like to share with BWP consultants, please send them to BWP consultant Dr. Kevin Castner at kcastner@yahoo.com or to the following address:

BWP & Associates - DeKalb 872 S. Milwaukee Ave. #221 Libertyville, IL 60048

Be sure to submit your survey by clicking the submit button below. When your survey is submitted, you will be redirected to the district's website.

If for some reason you are not redirected to the district website, scroll back through your survey to see if you marked more than three answers for the questions that ask for three responses. (Questions 1, 2, 3, and 5) Be sure you selected no more than three answers to these questions and then click the submit button again to submit your survey and be redirected to the district homepage.

SUBMIT



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### Madison Metropolitan School District Searching for Superintendent

**The Position** – The Madison Metropolitan School District (MMSD) continues to seek a strong educational leader who is deeply committed to equity to serve as Superintendent of Schools. The next Superintendent will have the opportunity to work with a dedicated school board, an engaged community, and a highly accomplished staff that is doing transformative work to ensure that Black children and youth thrive and every student graduates ready for college, career and community. The start date for the new Superintendent is on or before August 1, 2020. MMSD is an equal opportunity employer that strongly encourages candidates of color and women to apply.

**The District** – The Madison Metropolitan School District has a simple but bold vision - that every school will be a thriving school that prepares every student to graduate from high school ready for college, career and community. After making major gains and setting a strong foundation through its first strategic framework, the district is now embarking on its new, updated <u>Strategic Framework</u>, aimed at transformational change. That strategy starts with three goals: that all students achieve academically, that all students and adults thrive in positive school climates and that African American children and youth excel. We are committed to antiracism and Black Excellence, and we are on the move to do right for all of our children.

The Madison Metropolitan School District is the second largest school district in Wisconsin. The district serves a beautifully diverse population of more than 27,000 students. More than half are students of color, and nearly half come from low income households. Nearing one third are English Language Learners and dozens of other languages are spoken. Madison schools are committed to making this district a place where every child thrives.

More information about the district is available on the BWP & Associates website at www.bwpassociates. com. Additional information is available on the district's website, <u>https://www.mmsd.org</u>.

Qualifications / Licensure - The

Madison Metropolitan School District School Board seeks a transformative educational leader for equity, collaborative manager, and an effective communicator who has had experience in a similar position.

Licensure – Applicants are required to hold or provide evidence of eligibility for a Wisconsin Superintendent License. Candidates are encouraged to obtain information about requirements for certification from the Wisconsin Department of Instruction at https://dpi.wi.gov/.

Application / Selection Procedure / Salary -Individuals who wish to be considered for this position should complete an online BWP Applicant Data Form at www.bwpassociates.com.

An application file must include a letter of interest, a current resume, and three letters of reference. Candidates must send these materials electronically with the online Applicant Data Form. Official **transcripts** will be required from candidates who are invited to interview with the MMSD School Board

The salary and benefits for the successful candidate will be nationally competitive, negotiated and determined upon proven experience, qualifications and meeting specific Board criteria.

The <u>target date</u> for the superintendent to officially assume this position is August 1, 2020.

Application Deadline May 30, 2020 - Letters of application and other required materials must be received by BWP & Associates no later than May 30, 2020. The Board expects to finalize the search by June, 2020.

BWP search team: Dr. Kevin Castner 434-531-8171 Dr. Debra Hill 847-204-0462 For more information: www.bwpassociates.com





### Arlington, Va., School Division Searching for a Superintendent

**The Position** — The Arlington School Board seeks an educational leader to serve as Superintendent of Arlington Public Schools (APS). The next Superintendent will have the opportunity to work with a dedicated school board, a highly accomplished staff and a supportive and engaged community to advance the work of our nationally recognized school division and provide an educational program that prepares all students for success. The start date for the new Superintendent will be on or before July 1, 2020. APS is an equal opportunity employer.

**The Division** — Arlington is a diverse, dynamic community located across the Potomac River from Washington, D.C. APS is the 13th largest among Virginia's 132 school divisions and has received national accolades for its high academic standards and programs that provide multiple pathways to success for every student. The Division is governed by the five-member Arlington School Board and is committed to ensuring all students learn and thrive in safe, healthy and supportive learning environments.

APS serves a growing student body of approximately 28,200 PreK-12 students who speak 107 languages and represent 146 nations. The Division employs nearly 8,000 full and part-time employees, including 3,000 teachers. APS is financially strong, with an excellent national reputation for academic excellence, wonderful teachers and staff, and a high level of community and local government support. In 2019, *The Washington Post* ranked APS comprehensive high schools in the top 2% in the nation, and APS has been ranked the #1 school division in Virginia by *Niche<sup>®</sup> Best Schools* for the past two years. In addition to strong neighborhood schools, APS offers option programs that include dual-language immersion, International Baccalaureate, and Montessori, among other options. More information about APS and the position is available on the BWP & Associates website at <a href="https://www.apsva.us/engage/search-for-new-aps-superintendent/">www.bwpassociates.com</a> and on the APS website at <a href="https://www.apsva.us/engage/search-for-new-aps-superintendent/">https://www.apsva.us/engage/search-for-new-aps-superintendent/</a>.

**Qualifications / Licensure** — The School Board seeks an educational leader who will enhance APS's culture of collaboration, excellence and innovation, and lead the Division forward on its path to foster and ensure equity and inclusion for all students. The successful candidate will be known for integrity and character and will be respected as a leader who can successfully engage, motivate and manage a diverse and progressive system that is growing at a rapid pace. Applicants are required to hold or provide evidence of eligibility for a Virginia Division Superintendent License. Candidates are encouraged to obtain information about requirements for certification from the <u>Virginia Department of Education</u>.

**Application / Selection Procedure / Salary** – Individuals who wish to be considered for this position must complete an online BWP Applicant Data Form at <u>www.bwpassociates.com</u>. An application file must include a letter of interest indicating reasons for interest in the position, a current résumé, and three letters of reference. Candidates must send these materials electronically with the online Applicant Data Form. Official transcripts will be required from candidates who are invited to interview with the school board.

The salary and benefits for the successful candidate will be nationally competitive and determined upon proven experience, qualifications, and fulfillment of school board criteria. The new Superintendent will assume the position on or before July 1, 2020.

**Application Deadline: March 10, 2020** – Letters of interest and other required materials must be received by BWP no later than March 10, 2020. The School Board expects to finalize the search by late April 2020.

BWP search team: Dr. Kevin Castner 434-531-8171 Dr. Wayne Harris 540-761-1488 For more information: www.bwpassociates.com



### 7. Experience References:

### 7.1 Background information about our firm.

BWP & Associates was incorporated in 2002 in Wauconda, Illinois and grew from the merger of three nationally known search firms: Harold Webb Associates, PNR Associates, and The Bickert Group, Ltd.

- Harold Webb Associates, BWP's oldest roots, in 1977 became the first nationwide superintendent search firm in the country.
- PNR Associates conducted leadership searches in educational and national non-profit organizations since 1984.
- The Bickert Group, Ltd., incorporated in 1992, served predominately Midwest school districts.

Through the merger into BWP & Associates, these three firms significantly expanded their connections and consultant base. BWP's corporate office is located in Libertyville, Illinois. School district executive placements throughout the nation is the firm's total focus. Our web address is <a href="http://www.bwpassociates.com">www.bwpassociates.com</a>.

BWP consultants bring both national educational leadership connections as well as an understanding of what makes an outstanding superintendent. Our company's network of experienced educational leaders connects over 50 associates with school divisions, colleges and universities and business leaders across the country. Our consultants are active in state, regional, and national educational organizations, and many participate in superintendent academies to train current and future superintendents. Our consultant roster includes many successful current or retired superintendents who offer a high level of expertise about the role of a superintendent and are experienced in urban, suburban, and rural school systems.

Our outstanding consultants and our proven search methodology will enable us to meet Oak Park Unified School District's search contract objectives, beginning with establishing the characteristics and qualities desired in a superintendent. We will gather this invaluable information by seeking input and by engaging the school board, employees, community members, and other relevant stakeholders. Our process will maximize the number of quality applicants and allow us to screen applicants, based on the desired experiences, characteristics, and skill sets. Throughout the selection process, we will assist and enable the Board to select an outstanding candidate.

Our search firm receives more than 100 requests for proposals from districts of all sizes and demographics across the country, we continue to be very selective in those districts for whom we submit proposals. Our slow but steady growth enables us to "personalize" the search process and to make it tailor made for each of our clients, utilizing the talents of experienced professionals who

have held leadership positions.

Our website – <u>http://www.bwpassociates.com</u> – provides a list of past and current clients, announcements and communication with school districts and their recently appointed superintendents. You will also find a listing of current searches in progress.

### 7.2 Describe searches conducted for school districts and County Offices of Education; include the average length of time the candidate remained on the jobs.

### **Longevity of Superintendents Hired**

A 2018 internal study of Superintendent searches conducted by BWP from 2003 to 2017 in Illinois research data revealed:

- 55% of superintendents are still leading the districts in which they were placed
- 20% of superintendents retired from the districts in which they were placed
- 94 % of superintendents successfully completed their initial 3-5 year contract in districts in which they were placed (does not include those still in their first year contract)
- 82% of superintendents worked beyond their 3-5 first year contract in the districts in which they were placed (does not include those still in their first contract)
- Superintendents serve the districts in which they were placed significantly longer than the statewide average

Nationally, an overwhelming majority (approximately 94%) of candidates placed since 2007

- completed a minimum of 3 successful years
- 95% of candidates placed since 2007 were offered second contracts
- Not a single candidate placed since the founding of the company was found to be negligent/criminal in the performance of his/her duties

### Partial Client Listing of Completed Searches 2014-2020

- Duluth Public Schools | Duluth, Minnesota | 2019-2020 | 8,700 students | Superintendent Placement: Mr. John Magas | Superintendent Status: Current | Previous Position: Associate Superintendent of Continuous Improvement for Green Bay Area Public School District
- Glenbrook High School District 225 | Glenview, Illinois | 2019-2020 | 5,100 students | Superintendent Placement: Dr. Charles Johns | Superintendent Status: Current | Previous Position: Superintendent for West Chicago Elementary District 33
- Lockport Township High School District 205 | Lockport, Illinois | 2018-2019 | 3,700 students | Superintendent Placement: Dr. Robert McBride | Superintendent Status: Current | Previous Position: Principal for Neuqua Valley High School

- Community Consolidated School District 46 | Grayslake, Illinois | 2018-2019 | 3,800 students | Superintendent Placement: Dr. Lynn Glickman | Superintendent Status: Current | Previous Position: Associate Superintendent of Human Resources for Community Consolidated School District 21
- Hawthorn Community Consolidated School District | Vernon Hills, Illinois | 2019-2020 | 4,000 students | Superintendent Placement: Dr. Peter Hannigan | Superintendent Status: Current | Previous Position: Associate Superintendent of Human Resources for Community Consolidated School District 54
- Petersburg County Public Schools | Petersburg, Virginia | 2019-2020 | 4,275 students | Superintendent Placement: Dr. Maria Pitre-Martin | Superintendent Status: Current | Previous Position: Deputy State Superintendent/Chief Academic Officer for North Carolina Department of Public Instruction
- Kaneland Community Unit School District 302 | Maple Park, Illinois | 2015-2016 | 4,800 students | Superintendent Placement: Dr. Todd Leden | Superintendent Status: Current | Previous Position: Associate Superintendent of Educational Services/Principal for Fenton Community School District 60
- Noblesville Schools | Nobelsville, Indiana | 2014-2015 | 10,000 students | Superintendent Placement: Dr. Beth Niedermeyer | Superintendent Status: Current | Previous Position: Assistant Superintendent of Hamilton Southeastern Schools
- Kershaw County School District | Kershaw County, South Carolina | 2018-2019 & 2007-2008 | 10,750 students | Superintendent Placement: Dr. W. Shane Robbins | Superintendent Status: Current | Previous Position: Superintendent of Mt. Vernon Community School District
- Orangeburg County Public Schools | Orangeburg, South Carolina | 2019-2020 | 12,000 students | Superintendent Placement: Dr. Shawn Foster | Superintendent Status: Current | Previous Position: Chief Officer of Operation and Student Services at Aiken County School District
- Valley View Community Unit School District 365U | Bolingbrook, Illinois | 2019-2020 | 16,200 students | Superintendent Placement: Mrs. Rachel Kinder | Superintendent Status: Current | Previous Position: Assistant Superintendent of Educational Services at Valley View CUSD 365U
- Alamance Burlington Public Schools |Burlington, North Carolina | 2017-2018 | 23,100 students | Superintendent Placement: Dr. William Bruce Benson | Superintendent Status: Current | Previous Position: Superintendent of Stafford County Public Schools
- Columbus City Schools | Columbus, Ohio | 2018-2019 | 56,000 students | Superintendent
- Arlington County Public Schools | Arlington, Virginia | 2019-2020 | 27,000 students | Superintendent Placement: Dr. Francisco Duran | Superintendent Status: Current | Previous Position: Chief Academic and Equity Officer at Fairfax County Public Schools
- Madison Metropolitan School District | Madison, Wisconsin | 2019-2020 | 27,274 students | Superintendent Placement: Dr. Carlton Jenkins | Superintendent Status: Current | Previous Position: Superintendent of Robbinsdale School District
- Community Consolidated School District 15 | Palatine, Illinois | 2018-2019 | 12,700 students | Superintendent Placement: Dr. Laurie Heinz | Superintendent Status: Current | Previous Position: Superintendent of Park Ridge-Niles School District 64

- DeKalb County School District | Stone Mountain, Georgia | 2019-2020 | 99,200 students | Superintendent Placement: Dr. Cheryl Watson-Harris | Superintendent Status: Current | Previous Position: First Deputy Chancellor for the New York City Department of Education
- Placement: Dr. Talisa Dixon | Superintendent Status: Current | Previous Position: Superintendent of Cleveland Heights-University Heights City School District
- Rochester City Schools | Rochester, New York | 2018-2019 | 26,000 students | Superintendent Placement: Dr. Terry Dade | Superintendent Status: Past | Years in Position: 2
- Florence School District One | Florence, South Carolina | 2018-2019 | 16,400 students | Superintendent Placement: Dr. J. Richard O'Malley | Superintendent Status: Current | Previous Position: Superintendent of Mountainside School District
- Lee's Summit R-7 School District | Lee's Summit, Missouri | 2017-2018 | 18,500 students | Superintendent Placement: Mr. Dennis Carpenter | Superintendent Status: Past | Years in Position: 2
- Rockingham County Public Schools | Rockingham, Virginia | 2017-2018 | 11,500 students | Superintendent Placement: Dr. Oskar Scheikl | Superintendent Status: Current | Previous Position: Director of Information Management at Rockingham County Public Schools
- Chesterfield County Public Schools | Chesterfield, Virginia | 2016-2017 | 59,000 students | Superintendent Placement: Dr. James Lane | Superintendent Status: Past | Years in Position: 2
- Goochland County Schools | Goochland, Virginia | 2016-2017 & 2012-2013 | 24,000 students | Superintendent Placement: Dr. Jeremy Raley | Superintendent Status: Current | Previous Position: Superintendent of Shenandoah County Public Schools
- Hazelwood School District | Florissant, Missouri | 2016-2017 | 18,000 students | Superintendent Placement: Dr. Nettie Collins-Hart | Superintendent Status: Current | Distinction: 2019 Superintendent of the Year | Previous Position: Superintendent of Proviso Township High School District 209
- Waukegan Community Unit School District 60 | Waukegan, Illinois | 2016-2017 | 17,000 students | Superintendent Placement: Ms. Theresa Plascencia | Superintendent Status: Present | Previous Position: Executive Director for High School Design, Programs and Support at Chicago Public Schools
- Williamsburg James City County Public Schools | Williamsburg, Virginia | 2016-2017 | 11,500 students | Superintendent Placement: Dr. Olwen Herron | Superintendent Status: Current | Previous Position: Deputy Superintendent of Williamsburg-James City County Public Schools
- Capital Regional Educational Council (CREC) | Hartford, Connecticut | 2015-2016 | 35 districts serving 145,000 students | Leadership Placement: Dr. Greg Florio | Leadership Status: Current | Previous Position: Superintendent of Cheshire Public Schools
- Berkeley County School District | Moncks Corner, South Carolina | 2015-2016 & 2009-2010 | 33,000 students | Superintendent Placement: Dr. Brenda Blackburn | Superintendent Status: Past | Years in Position: 2
- Richland School District One | Columbia, South Carolina | 2015-2016 | 24,000 students | Superintendent Placement: Dr. Craig Witherspoon | Superintendent Status: Current | Previous Position: Superintendent of Birmingham City Schools

- Hanover County Public Schools | Ashland, Virginia | 2015-2016 & 2011-2012 | 19,000 students | Superintendent Placement: Dr. Michael Gill | Superintendent Status: Current | Previous Position: Assistant Superintendent for Instructional Leadership at Hanover County Public Schools
- Corpus Christi Independent School District | Corpus Christi, Texas | 2014-2015 | 39,000 students | Superintendent Placement: Dr. Roland Hernandez | Superintendent Status: Current | Previous Position: Superintendent of Waco Independent School District
- Metropolitan School District of Lawrence Township | Indianapolis, Indiana | 2014-2015 | 14,000 students | Superintendent Placement: Dr. Shawn Smith | Superintendent Status: Current | Previous Position: Assistant Superintendent of Pike Township
- ECHO Joint Agreement | Calumet City, Illinois | 2017-2018 | Special Education Cooperative for 17 School Districts | Superintendent Placement: Dr. Sandra Thomas | Superintendent Status: Current | Previous Position: Superintendent Country Club Hills School District 160
- Special Education (SPEED) Joint Agreement District 802 | 2017 -2018 | Special Education Cooperative for 15 School Districts | Superintendent Placement: Dr. Tina Halliman | Superintendent Status: Current | Previous Position: Superintendent: School District 130

# 7.3 Resumes of key members of the project team, specifically the team leader assigned to facilitate this proposal.

Below are the resumes of Dr. Debra Hill, Managing Director, Dr. Kathleen Williams, Team Leader, and Dr. Sheila Harrison-Williams, Director.

### Dr. Kathleen Williams

#### **Education**

Northern Illinois University (DeKalb)	Ed. D. Administration & Educational Policy	1996
Northern Illinois University (DeKalb)	M.S. Educational Administration	1982
Indiana University (Bloomington)	B.S. Elementary Education	1971

#### **Experience**

BWP & Assoc.Educational Leadership Search Consultants		Director	2010-Present
Wausau School District	Wausau, Wisconsin	Superintendent of Schools	2010-2017
East Maine School District 63	DesPlaines, IL	Superintendent of Schools	2000-2009
University of Illinois Graduate School	Oak Brook, IL	Adjunct Professor	2008
Lawrence USD 497	Lawrence, KS	Superintendent of School	1998-2000
Schaumburg CSD 54	Schaumburg, IL	Assistant Superintendent	1995-1998
Naperville CUSD 203	Naperville, IL	Elementary Principal	1988-1995
Mt. Morris CUSD	Mt. Morris, IL	Asst. Superintendent/Principal	1985-1988
Chadwick CUSD 399	Chadwick, IL	Elem. Teacher/K-12 Principal	1978-1985
Latin School of Chicago	Chicago, IL	Elementary Teacher	1972-1974
St. Hubert's School	Hoffman Estates, IL	Elementary Teacher	1971-1972

#### Professional Affiliations (as a superintendent)

American Association of School Administrators Wisconsin Association of School Administrators Chairman of School Facilities Committee Speaker at New Superintendent and WASA Workshops Wisconsin Cooperative Education Service Agency #9 Chairman 2016-17 Board of Directors 2014-17 Illinois Association of School Administrators Former Board of Directors Member Former President and Secretary of North Cook Division Former Member of State Superintendent's Advisory Committee Former Member of State's RTI (Response to Intervention) Committee Superintendents' Roundtable Suburban Superintendents' Association Midwest Superintendents Association Kansas Association of School Administrators

#### **Background Highlights in Brief**

\* Experienced in unit (PK-12) and elementary (Grades PK-8) in urban, suburban, and rural school districts with a broad spectrum of socio-economic conditions

\* Experienced in highly diverse student/parent populations, as well as bilingual and dual language programming

\* Experienced in volatile conflict resolution situations (involving school closings, attendance boundaries, facilities analysis and construction, board-staff-community relations, union relationships, development of an alternative teacher compensation matrix/process, religious music, transgender population guidelines, and board development and relations/code of conduct)

\* Experienced in the successful passage of education and building bond referenda and community strategic planning

\* Assisted in the initiation of personalized learning and 1-1 technology advancement, as well as school safety modifications

### Sheila Harrison-Williams, Ed.D.

9540 Bedford Drive, Woodridge, IL 60517 · hwsheila@gmail.com · 708-935-0471 (C) · 630-910-6981 (h)

### **Education**

Doctor of Education, 2000, Northern Illinois University, DeKalb, IL Master of Arts, 1995, Northeastern Illinois University, Chicago, IL Bachelor of Arts, 1991, Northeastern Illinois University, Chicago, IL

### Professional Experience

July 2004-Present	Superintendent of Schools, Hazel Crest School District 152½, Hazel Crest, IL
January 2002-2004	Superintendent of Schools, Fairmont School District 89, Lockport, IL
2000-2002	Principal, Valley View Elementary School, Romeoville, IL
1997-2000	Principal, Culbertson Elementary School, Joliet, IL
1996-1997	Head Teacher, Sojourner Truth School, Chicago, IL
1991-1996	Teacher/Special Education Case Manager, Laura Ward School, Chicago, IL

### Professional Affiliations

American Association of School Administrators, Governing Board Illinois Association of School Administrators, Board of Directors *At-Large Minority Representative* South Cook Association of School Administrators, Board of Director Illinois Association of School Business Officials, Member National Alliance of Black School Educators, Life Member *Superintendents Commission, Secretary* Pi Lambda Theta International Honor and Professional Association in Education, Member Association of Supervision and Curriculum Development, Member Illinois Association of Supervision and Curriculum Develop, Member Superintendents Commission for the Study of Demographics & Diversity, Past-President Suburban Superintendent Association, President Superintendents Institute of America, Member South Cooperative Organization for Public Education, Executive Board Exceptional Children Have Options, Executive Board

### Publications and Presentation

Harrison-Williams, Sheila (2000). "<u>Achieving the Superintendency: Barriers, Strategies, & Maintenance</u> Behaviors" Published Dissertation, Northern Illinois University, DeKalb, IL

National Alliance of Black School Educators Conference Presenter, "Achieving the Superintendency: Barriers, Strategies, & Maintenance Behaviors", 2004-2007

National Alliance of Black School Educators Pre-Conference Activity, "Aspiring Superintendents" Academy Coordinator, 2008-2011

National Alliance of Black School Educators "Aspiring Superintendents" Summer Institute Director, 2011 Evans Newton Incorporated Leadership Symposium Presenter, "Hazel Crest School District: Target Teach and Academic Success", 2007, 2009

No Child Left Behind State Conference Presenter, "Single-Gender Education: How Boys and Girls Learn Differently", 2006

Superintendents Commission for the Study of Demographics and Diversity Annual Conference, "Transforming the Paradigm of Educating Children" Host, 2005-2011

Superintendents Commission for the Study of Demographics and Diversity Annual Conference,

"Transforming the Paradigm of Educating Children" Presenter, "Achieving the Superintendency", 2010

### Honors and Awards

National Alliance of Black School Educators, 2009 Phenomenal Women Award.

The Top Ladies of Distinction/Lincoln Park Chapter, 2010 Crown Jewel Award Celebrating Women in School Administration.

Illinois Chapter/National School Public Relations Association, 2010 Distinguished Service Award of Excellence.

Extraordinary Service and Dedication to Education Award, City of Markham, IL, June 2011. National Alliance of Black School Educators, 2011 Superintendent of the Year Award. American Association of School Administrators, 2012 Dr. Effie H. Jones Humanitarian A



### DEBRA A. HILL

517 Dodge Avenue. Evanston, IL 60602 Phone 847-475-1792. <u>Fax 847-475-6950. Cell</u> 847-204-0462. E-Mail drmomaka29@gmailcom

### **Objective:** Expert Consultant on Educational Issues

### Experience

- 2014 Present Managing Director BWP & Associates Search Firm
- 2008 2017 Associate/Adjunct Professor Argosy University
- 2002 Present Associate Bickert, Webb, Plath, Executive Search Firm
- 1990 Present Independent Educational Consultant
- 2000 2007 Superintendent of Schools West Northfield SD 31
- 1999 2000 Assist. Superintendent for Staff Development Evanston SD 65
- 1992 2000 Assist. Superintendent of Curriculum & Instruction Evanston SD 65
- 1998 1999 Interim Superintendent of Schools Evanston SD 65
- 1988 2012 Adjunct Professor National Louis University
- 1972 1982 Classroom Teacher Oak Park and Evanston, IL

### Education

- 1993 Loyola University Chicago
- 1972 Northwestern University Evanston
- 1971 Northwestern University Evanston
- 1967 Englewood High School Chicago

### Accreditations

- Numerous workshops as listed
- Character Counts participant and trainer
- Mennonite Peace Training Program
- Teacher Expectations and Student Achievement (TESA) Trainer
- Association of School Administrators Trainer
- Standards and Assessment Harvard Professional Education Program
- Motorola Leadership Academy
- National Louis TPACT Technology in the Classroom Project
- Grant Reader Illinois State Board

### **Professional Memberships**

• Association for Supervision and Curriculum Development (ASCD)



- Ph.D. Curriculum/Human Resources
- Master of Arts in Teaching
- Bachelor of Science
- Mastan of Asta in Taashina

International Board of Directors, Leadership Council, Nominations Committee Chair, Legislative Committee, President-Elect, President, Past President

Illinois Association for Supervision and Curriculum Development (IASCD)

President, Program Coordinator, State Standards Committee, Leader Mentor Program, Governance Chair

- National Organizations for Math, Reading, Science, and Social Studies
- National Alliance of Black School Educators
- National Middle Schools Association Diversity Committee
- Phi Delta Kappa
- Evanston District 65 Teacher-Administrator Negotiations Team
- Evanston Township High School Curriculum Forum
- National Committee Minority Student Achievement Network
- City/School Liaison (Evanston)
- Evanston United Way Board
- Foster Reading Center Board of Directors
- Evanston Arts Council
- National Louis University ISBE NCATE Review Committee
- Golden Apple Awards Nominations Review Committee
- North Cook Intermediate Service Center Governing Board (Chair)
- Evanston Housing Options Board of Directors (Vice President, President)
- Rotary International Glenview Sunrise Club (Activities Chair)
- Evanston Alumnae Chapter of Alpha Kappa Alpha Sorority (Vice President- Grad. Advisor)

I have served in leadership capacities in numerous professional and community organizations, presented workshops and made program presentations at most of the organizations listed.

### Awards and Publications

- Accepting the Disabled" Rehab Institute of Chicago (1989)
- "Breaking the Mold" Illinois State Board of Education (1999)
- "Stone of Help" Ebenezer Church (1999)
- NAACP Community Service Award (1999)
- International Who's Who of Professional and Business Women (1999)
- Distinctive Ladies Community Leadership Award (1999)
- Sterling's Who's Who in American Education (2000)
- "Teacher Tips", National Louis University Newsletter (2000)
- National Staff Development Conference (2000)
- King Elementary School Parent Involvement (2000)
- Certificate of Appreciation ASCD (2000-2005)
- "Service Above Self Award" Glenview Rotary Sunrise (2004)
- "Superintendent of the Year" Nomination North Cook IASA (2006)
- North Cook Division Illinois Association of School Administrators (2007)
- "Dare to be Great" Honoree, IL. Women in Educational Leadership, (April 2014)
- "Damen Alumni Award", Loyola University (June 2015)



### 7.3 Provide the names, addresses, phone numbers, and email address of the three past or current clients in California who may be contacted to attest to your ability to perform the requested services.

BWP has not yet had the pleasure of working with any school districts in California. While that is the case, we absolutely will provide due diligence in being cognizant of all state laws and regulations guiding superintendent searches in California.

Because we are a national search firm, BWP on occasion finds itself in a position of having no previous search experience in a state. That was the case in the Capitol Region Education Council in Hartford, Connecticut, where BWP navigated a highly successful Executive Director placement.

### 8. Guarantee:

# 8.1 What kind of guarantee does your firm provide in the event of an unsuccessful search?

- If the new superintendent resigns or is dismissed for cause within 12 months of commencing duties, BWP & Associates will conduct a new search at no additional cost excluding expenses to the Oak Park Unified School District Board of Education.
- BWP & Associates will provide mentoring/support for a year to the new superintendent and board, if desired, to assist with transition and leadership success.

### TABLE OF CONTENTS FOR SEARCH FIRM SERVICES FOR OAK PARK UNIFIED SCHOOL DISTRICT

- 1. TABLE OF CONTENTS ......Page 1
- 2. RFP INSTRUCTIONS AND CONDITIONS......Page 2
- 3. SERVICE REQUIREMENTS......Page 6

### ATTACHMENTS

- a) Nondiscrimination by Supplier
- b) Workers Compensation
- c) Noncollusion Declaration

NOTE: The Table of Contents is to be made part of the above referenced bid.

.19

Anthony Knight, Ed.D. Superintendent of Schools Oak Park Unified School District

### NONDISCRIMINATION CERTIFICATION

I am aware of and hereby certify that Contractor shall comply with Section 1735 of the Labor Code, which provides as follows:

No discrimination shall be made in the employment of persons upon public works because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, handicap, medical condition, marital status, or gender of such persons, except as provided in Section 12940 of the Government Code, and every contractor for public works violating this Section is subject to all the penalties imposed for a violation of [Chapter 1 of Part 7, Division 2 of the Labor Code].

By	
	Signature
	Dr. Debra A. Hill
	Typed or Printed Name
	Managing Director
	Title
	December 1, 2020
	Date

### WORKERS' COMPENSATION CERTIFICATION

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

(a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.

(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Managing Director

Title

**BWP & Associates** 

Company

(In accordance with article 5 (commencing at section 1860), chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under this contract.)

### Noncollusion Declaration <u>To Be Executed By Bidder And Submitted With Bid</u>

### Project: Oak Park Unified School District, Superintendent Search

I, <u>Debra A. Hill</u>, declare that I am the <u>Mumuria</u> of <u>BwP and Associates</u> the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Company Name BWP and Associates

Company Address 872 S. Milwayker # 221

Signature of Officer Auture a Hul

Title <u>Managins</u> <u>Drectur</u> LiBerty ville, <del>IL</del> 60048

### NOTARY FOR NONCOLLUSION DECLARATION

TZ day of December, 2026 Subscribed and sworn to (or affirmed) before me this MILOS TODOROVIC Official Seal 6 Notary Public - State of Illir,ois My Commission Expires Jul "ii, 2022 Signature of Notary

[SEAL OF NOTARY]

Milos ToDoPovic

Typed Name of Notary

536-22/6007051. I

то:	MEMBERS, BOARD OF EDUCATION	
FROM:	DR. ANTHONY W. KNIGHT, SUPERINTENDENT	
DATE:	<b>DECEMBER 8, 2020</b>	
SUBJECT:	A.1.b. DISCUSS THE INTERVIEW PROCESS INCLUDING RELATED COMMUNICATIONS	
		DISCUSSION
ISSUE:		Shall the Board Discuss the Interview Process Including Related Communications?
<b>BACKGROUND:</b>		The selection of a new superintendent is probably the most important decision a board of education has to make. As part of the search process for the new superintendent, the board asked staff to put out a request for proposals to Executive Search firms. The request for proposal was sent on November 18, 2020, and five firms submitted their proposals to the District. At this meeting, the Board will discuss the interview process for the firms who will be invited to present at a Special Meeting to be held <b>on December 16, 2020</b> at <b>5:00 pm</b> . The board will also discuss the communication related to the search process, which will include input from staff, families, and the community to find the most qualified and best candidates for our Oak Park USD community.
FISCAL IMPACT:		None, for Discussion only

Respectfully submitted,

Anthony W. Knight, Ed.D. Superintendent