

RESCUE UNION SCHOOL DISTRICT

AGENDA ITEM: Superintendent Hiring Process

BACKGROUND:

With the retirement of the current Superintendent, the Board will determine the process for filling the upcoming vacancy for superintendent.

STATUS:

The Board will review and discuss proposals from potential search firms to assist in the process for filling the upcoming vacancy for superintendent.

FISCAL IMPACT:

Cost will be determined upon selection of search proposal.

BOARD GOAL:

Board Focus Goal IV - STAFF NEEDS:

Attract and retain diverse, knowledgeable, dedicated employees who are skilled and supported in their commitment to provide quality education for our students.

RECOMMENDATION:

The Board establish a process for filling the upcoming vacancy for the position of Superintendent, Rescue Union School District.

Execute Search Firms

CSBA/McPherson & Jacobson, LLC
7905 L Street, Suite 310
Omaha, NE 68127
(888) 375-4814

Dave Long & Associates (DL)
636 Loretta Drive
Laguna Beach, CA 92651
(916) 616-6027

El Dorado County Office of Education
6767 Green Valley Road
Placerville, CA 95667
(530) 621-2543

Hazard, Young, Attea & Associates (HYA)
ECRA Group Inc.
530 Lytton Ave., 2nd Fl.
Palo Alto, CA 94301
(847) 318-0072

Leadership Associates (LA)
50-855 Washington Street,
#C-205
La Quinta, CA 92253
(760) 771-4277

A Proposal Prepared for

Rescue Union School District

Rescue, California

for

*The Search and Selection of a
Superintendent of Schools*

submitted in collaboration with



by

MCPHERSON *MJ* JACOBSON, LLC
EXECUTIVE RECRUITMENT & DEVELOPMENT

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MCPHERSON & JACOBSON, L.L.C.
Executive Recruitment & Development
in collaboration with the California School Boards Association



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February 8, 2017

Board of Trustees
Rescue Union School District
2390 Bass Lake Road
Rescue, California 95672

Thank you for your request for information. The enclosed proposal describes the professional services the California School Board Association representative, McPherson & Jacobson, L.L.C. will provide Rescue Union School District in ensuring your superintendent search secures quality leadership for the 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 stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

McPherson & Jacobson has been conducting searches for boards of education since 1991. We have over 100 consultants across the United States, including 15 in California who will ensure your search results in quality leadership for your district.

Our contact information:

McPherson & Jacobson, L.L.C.
7905 L St., Suite 310
Omaha, Nebraska 68127
Telephone: 402-991-7031/888-375-4814
Fax: 402-991-7168
Email: mail@macnjake.com

We welcome the opportunity to meet with your board to present our proposal and discuss our proven search process.

Sincerely,

Thomas Jacobson

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

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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.

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 650 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 100 consultants** across the nation. Almost one-fourth 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 (2006) 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, **eighty percent** of administrators are in the position for which they were hired. **Fifty-five percent** of administrators are still in the position for which they were hired within the past ten years. **Almost half** of the administrators selected by governing boards within the past 15 years continue in the position for which they were hired.

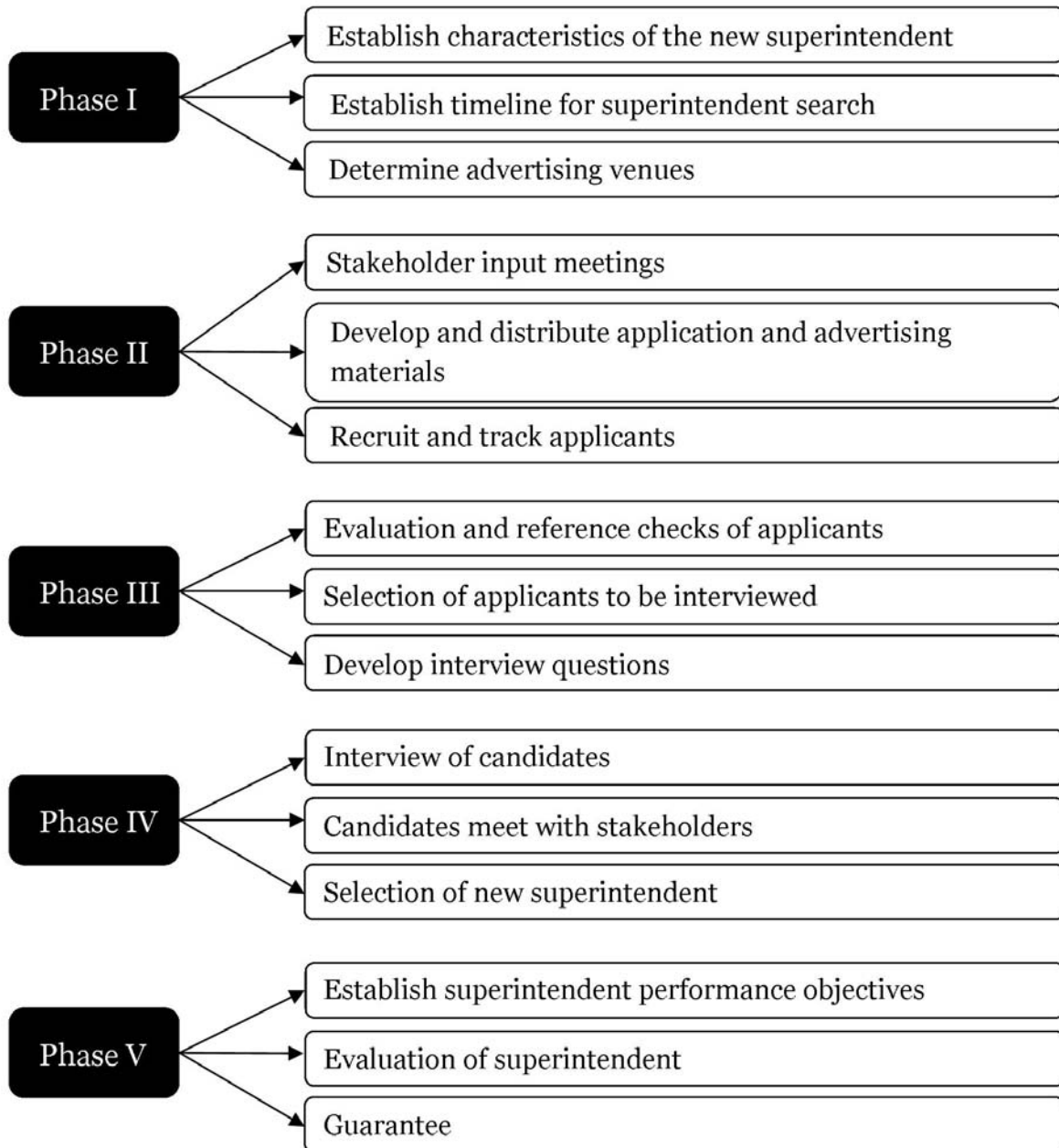
Executive Summary

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 time consuming 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



Phase I

Working with the Board, and stakeholder groups identified by the Board, McPherson & Jacobson's consultants will:

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

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.

- ✓ **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.

- ✓ **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.

Phase II

In Phase II McPherson & Jacobson's consultants will:

✓ **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.

✓ **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.

✓ **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 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.

"We were really impressed with the interview process. This was my third time in twenty years to select a superintendent and this was the best. We had an opportunity to meet informally and formally in a quiet setting and really get to know the candidates better."

Priscilla Cox, Elk Grove Unified School District, CA

"It gave us peace of mind and made our work much easier. We could focus on our needs rather than getting bogged down and frustrated with the process."

Janet Alonso, Winship-Robbins Elementary School District, Meridian, CA

"The brochure looked very professional, we were pleased."

Tamara Jones, Lakeside Union School District, Bakersfield, CA

"Thorough and open review of all candidates."

Michael Leydon, Newcastle Elementary School District, Newcastle, CA

"Best price, best service."

Bobbie Singh-Allen, Elk Grove Unified School District, CA

Phase III

In Phase III McPherson & Jacobson's consultants will:

✓ **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.

✓ **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

In Phase IV McPherson & Jacobson's consultants will:

- ✓ **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.

- ✓ **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.

Working with the board and the point of contact, 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.**

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.

"This was the first time our district had used a stakeholder committee in addition to the board for input on finalists. The search firm provided outstanding guidance and worked well with district staff to establish a thoughtful productive process."

Priscilla Cox, Elk Grove Unified School District, CA

"High level of professionalism accompanied by a personable and transparent consultant leading a very good process to a very good outcome."

Michael Leydon, Newcastle Elementary School District, Newcastle, CA

"Know what school boards need for district size. Easy to do business with."

Chet Madison, Elk Grove Unified School District, CA

Phase V

In Phase V McPherson & Jacobson's consultants will:

✓ **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. 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.

"I have been through this process several times. This process was one of the best"
Jeanette J. Amavisca, Elk Grove Unified School District, CA

"I would highly recommend your firm to other school districts."
Field Gibson, Paso Robles Joint Unified School District, CA

"I was very pleased with the search in every aspect."
Peggy Buckles, Conejo Valley Unified School District, Thousand Oaks , CA

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.

Search sequence:

- At the beginning of the search
 - 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
 - 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
 - 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
 - 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
 - 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

Responsibilities of Rescue Union School District and McPherson & Jacobson, L.L.C.

Event	McPherson & Jacobson's Tasks
1 st board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> The consultant guides the board in determining the following items <ul style="list-style-type: none"> ○ Characteristics for the new superintendent ○ The search calendar ○ Compensation parameters ○ Identify the appropriate constituent groups for stakeholder input ○ Advertising venues <input type="checkbox"/> The consultant works with the Point of Contact to compile: <ul style="list-style-type: none"> ○ Information to create the brochure announcing the vacancy ○ The list of names to be invited to the community input meetings
After 1 st meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Application link is posted online <input type="checkbox"/> Brochure announcing the vacancy is created <input type="checkbox"/> Advertising is started <input type="checkbox"/> Vacancy announcements are sent out <input type="checkbox"/> E-mails are sent to applicants registered with McPherson & Jacobson notifying them about the opening <input type="checkbox"/> E-mails are sent to consultants regarding the opening, requesting they invite candidates to apply for the position <input type="checkbox"/> Opening is posted on social media and additional venues
During application period	<ul style="list-style-type: none"> <input type="checkbox"/> Consultants recruit candidates that fit the position <input type="checkbox"/> Monitors applicants and where they are in the application process <input type="checkbox"/> Notifies applicants of the closing date for submitting their materials <input type="checkbox"/> Lead consultant keeps the board up-to-date on the search
Stakeholder meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Home Office sends out invitations to the community stakeholder meeting(s) after receiving the information from the consultant and the district
Stakeholder meetings	<ul style="list-style-type: none"> <input type="checkbox"/> Consultants facilitate the stakeholder meetings, recording the input <input type="checkbox"/> An online stakeholder input survey is created, the link is posted on the McPherson & Jacobson website and also provided to the district to post
Stakeholder meetings completed	<ul style="list-style-type: none"> <input type="checkbox"/> Consultant summarizes key themes and gives the results to the district <input type="checkbox"/> Copy of summary is sent to Home Office <input type="checkbox"/> The stakeholder input summary report is created
2 nd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Review stakeholder input summary report and provide copies to the district <input type="checkbox"/> The consultant guides the board in determining the following items <ul style="list-style-type: none"> ○ Interview questions ○ Length of contract, moving and interview expenses ○ Spouse/significant other's involvement in interview process ○ District Interview Schedule ○ Candidate Daily Interview Schedule <input type="checkbox"/> Interview questions are sent to Home Office to be formatted
Prior to 3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Applicant packets are reviewed by the consultants and reference checks are performed <input type="checkbox"/> Contact candidates on short list and verify their interest in the position <input type="checkbox"/> Meet with stakeholder group chairs to review schedule, procedures and screen questions

Event	McPherson & Jacobson's Tasks
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> The consultant facilitates the board's <ul style="list-style-type: none"> <input type="checkbox"/> Review of the list of all applicants <input type="checkbox"/> Overview of candidates on short list <input type="checkbox"/> Selection of finalists <input type="checkbox"/> Finalizing of interview dates & schedule <input type="checkbox"/> Review of interview questions & procedures <input type="checkbox"/> Finalizing candidate & spouse/significant other arrangements <input type="checkbox"/> Contact finalists and schedule interview dates, review schedule, discuss compensation and contractual issues <input type="checkbox"/> Work with Point of Contact to coordinate interviews (transportation, lodging, interview locations, etc.) <input type="checkbox"/> Send Candidate Daily Interview Schedule to each finalist <input type="checkbox"/> Notify the applicants who were not selected to be interviewed
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> Call Point of Contact after 1st interview to learn how it went <input type="checkbox"/> Call 1st candidate to learn their perspective and how the interview went <input type="checkbox"/> Suggest any possible improvements <input type="checkbox"/> Be available for questions <input type="checkbox"/> Be present at interviews if request is made by school district (additional fee for this service)
Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Call and make offer to candidate <input type="checkbox"/> Verify acceptance <input type="checkbox"/> Conduct criminal/financial/credential verification check on selected candidate <input type="checkbox"/> Call other finalists <input type="checkbox"/> Sends out letter of congratulations to candidate who was chosen
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Facilitate board and superintendent's identification of 2-3 performance objectives and evidence of progress the board will accept <input type="checkbox"/> Consultant reviews superintendent's plan

Rescue Union School District

Event	School District's Tasks
1 st Board Meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the board member list <input type="checkbox"/> Reviews the brochure
Community meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Names and addresses are sent to Home Office for community member stakeholder meeting invitations <input type="checkbox"/> Notifies internal stakeholders of times and locations for stakeholder meetings <input type="checkbox"/> Posts dates, times and locations of meetings and public forum(s) and encourages stakeholder attendance <input type="checkbox"/> Publishes link to online stakeholder input survey
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Board decides if they wish to conduct semi-finalist interviews <input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour <input type="checkbox"/> Arrange logistics for stakeholder focus groups
Semi-finalist Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> The board interviews each semi-finalist <input type="checkbox"/> The board determines the finalists to be interviewed
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> One candidate per day <input type="checkbox"/> Board member greets each candidate upon arrival to district <input type="checkbox"/> Coordinates candidate's meeting with stakeholder focus groups and retrieval of input forms <input type="checkbox"/> Informal interview-social setting <input type="checkbox"/> Formal interview <input type="checkbox"/> Spouse/significant other's visitation is coordinated
Meeting to Select Finalists/ Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Board members meet and discuss each candidate individually <input type="checkbox"/> Individually rank order candidates <input type="checkbox"/> Read input forms submitted by stakeholder focus groups <input type="checkbox"/> Select minimum of #1 and #2 candidates <input type="checkbox"/> Contact consultant with selection results <input type="checkbox"/> Send interview forms and files to the Home Office <input type="checkbox"/> Board completes an evaluation of the search service provided by McPherson & Jacobson
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Superintendent creates plan with target objectives and timelines <input type="checkbox"/> Board adopts plan <input type="checkbox"/> Send copy of plan to Home Office

Investment

The investment for conducting the superintendent search is \$12,900 for Phases I-V.

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.

Expenses in addition to the consulting fee are: cost of media advertisement selected by the board; office expenses; telephone charges for reference checks; travel and expenses for consultants in district visits; consultants' attendance at the interviews or additional meetings. All expenses will be explained and agreed to prior to the commitment of the search process.

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.

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 with a form in which, using group consensus, they will record their impressions 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.

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.

McPherson & Jacobson will also allow stakeholders to submit their input online.

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

Alisal Union School District

1205 E. Market St.
Salinas, CA 93905
School Phone: 831-753-5700
Search Year: 2015/16
Enrollment: 9,000

Alpine Union School District

1323 Administration Way
Alpine, CA 91901
School Phone: 707-747-8300
Search Year: 2015/16
Enrollment: 1,700

Benicia Unified School District

350 East K St.
Benicia CA 94510
School Phone: 707-747-8300
Search Year: 2014/15
Enrollment: 5,000

Brawley Elementary School District

261 D Street
Brawley, CA 92227
School Phone: 760-344-2330
Search Year: 2015/16
Enrollment: 4,000

Cold Spring School District

2243 Sycamore Canyon Rd
Santa Barbara CA 93108
School Phone: 805-969-2678
Search Year: 2016/17
Enrollment: 175

Conejo Valley Unified School District

1400 E. Janss Rd
Thousand Oaks CA 91362
School Phone: 805-497-9511
Search Year: 2014/15
Enrollment: 19,500

El Monte Union High School District

3537 Johnson Ave
El Monte CA 91731
School Phone: 626-444-9055
Search Year: 2014/15
Enrollment: 9,500

Elk Grove Unified School District

9510 Elk Grove-Florin Rd.
Elk Grove CA 95624
School Phone: 916-686-5085
Search Year: 2014/15
Enrollment: 62,000

Fallbrook Union High School District

2234 South Stagecoach Lane
Fallbrook CA 92028
School Phone: 760-723-6332
Search Year: 2013/14
Enrollment: 2,600

Fort Sage Unified School District

100 D.S. Hall St
PO Box 35
Herlong CA 96113
School Phone: 530-827-2129
Search Year: 2016/17
Enrollment: 180

Glendale Unified School District

223 North Jackson St.
Glendale CA 91206
School Phone: 818-241-3111
Search Year: 2014/15
Enrollment: 26,200

Gustine Unified School District

1500 Meredith Ave.
Gustine CA 95322
School Phone: 209-854-3784
Search Year: 2014/15
Enrollment: 1,830

Hemet Unified School District

1791 W. Acacia Ave.
Hemet, CA 92545
School Phone: 951-765-5100
Search Year: 2015/16
Enrollment: 21,000

Johnstonville Elementary School District

704-795 Bangham Lane
Susanville, CA 96130
School Phone: 530-257-2471
Search Year: 2015/16
Enrollment: 205

Lakeside Union School District

14535 Old River Road
Bakersfield CA 93311
School Phone: 661-836-6658
Search Year: 2014/15
Enrollment: 1,310

New Haven Unified School District

34200 Alvarado-Niles Rd
Union City CA 94587
School Phone: 510-471-1100
Search Year: 2016/17
Enrollment: 12,148

Newcastle Elementary School District

450 Main St.
PO Box 1028
Newcastle CA 95658
School Phone: 916-259-2832
Search Year: 2014/15
Enrollment: 796

Old Adobe Union School District

845 Crinella Dr.
Petaluma CA 94954
School Phone: 707-695-6633
Search Year: 2013/14
Enrollment: 1,700

Oxnard Union High School District

39 S K St.
Oxnard CA 93030
School Phone: 805-385-2500
Search Year: 2015/16
Enrollment: 16,500

Paso Robles Joint Unified School District

800 Niblick Rd
PO Box 7010
Paso Robles CA 93446
School Phone: 805-769-1000
Search Year: 2013/14
Enrollment: 6,500

Penn Valley Union Elementary School District

14806 Pleasant Valley Rd.
Penn Valley CA 95946
School Phone: 530-432-7311
Search Year: 2014/15
Enrollment: 700

Pleasanton Unified School District

4665 Bernal Ave.
Pleasanton CA 94566
School Phone: 925-462-5500
Search Year: 2015/16
Enrollment: 14,800

Pollock Pines Elementary School District

2701 Amber Trail
Pollock Pines CA 95726
School Phone: 530-644-5416
Search Year: 2015/16
Enrollment: 800

Red Bluff Joint Union High School District

1260 Union St.
Red Bluff CA 96080
School Phone: 530-529-8710
Search Year: 2013/14
Enrollment: 1,622

Richland School District

331 N. Shafter Ave.
Shafter, CA 93263
School Phone: 661-746-8600
Search Year: 2015/16
Enrollment: 3,504

Soledad Unified School District

1261 Metz Rd.
Soledad, CA 93960
School phone: 831-678-0786
Search Year: 2016/17
Enrollment: 4,800

Sausalito Marin City School District

200 Phillips Drive
Marin City CA 94965
School Phone: 415-332-3190
Search Year: 2015/16
Enrollment: 524

Winship-Robbins Elementary School District

4305 S Meridian Rd
Meridian CA 95957
School Phone: 530-696-2451
Search Year: 2013/14
Enrollment: 200

California Consultants

Mrs. Janice Adams
Retired Superintendent
Benicia, California

Ms. Aida Buelna-Valenzuela
Retired Superintendent
Woodland, California

Mr. Robert Challinor
Retired Superintendent
Victorville, California

Mr. Robert Ferguson
Retired Superintendent
Napa, California

Dr. Donald Helms
Retired Superintendent
Placerville, California

Dr. Molly Helms
Retired Superintendent
Placerville, California

Mr. William Huyett
Retired Superintendent
Lodi, California

Mr. Benjamin Johnson, II
Board Member
Riverside, California

Dr. Steven Lowder
Retired Superintendent
Stockton, California

Mr. Dennis Murray
Retired Superintendent
Murrieta, California

Mr. John Pruitt, Jr.
Former Board Member
Chino, California

Mr. Edward Velasquez
Retired Superintendent
Chino, California

Ms. Teri Vigil
Board Member
Falls River Joint Unified School Dist.
McArthur, California

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.

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.

A handwritten signature in black ink, appearing to read "B Connolly".

Betsy Connolly DVM

June 3, 2014

To Whom It May Concern:

I am writing this letter on behalf of Drs. Don and Molly Helms. We recently hired them through your firm to aide us in our search for a superintendent for the Winship-Robbins Elementary School District. The search started in mid March and concluded in late April with the successful hiring of Dr. Laurie Goodman.

Throughout the process Don and Molly Helms were professional, well informed, and organized. What started out as a seemingly daunting task proved to be efficient, manageable, and rather exhilarating. We felt the list of questions thoroughly covered our needs and the timeline was smooth. The advertising certainly attracted more applicants than we would have been able to accomplish on our own. Don and Molly also recruited which brought in one particularly good candidate. Their screening of applicants streamlined our job. We felt confident with their guidance and appreciated their commitment to helping us achieve our important goal.

We look forward to the new school year with the confidence that comes from feeling we have hired the right superintendent to serve the needs of our entire school community. Our sincere thanks go to Don and Molly for their valuable contribution.

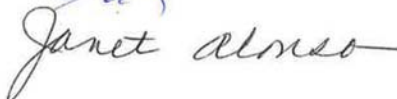
Sincerely,

Winship-Robbins Elementary School Board

Hassan Mohsen, President



Janet Alonso, Clerk



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.

Over 25 percent 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 has placed numerous minority/female candidates; our most recent placements are listed below:

<u>Search Year</u>	<u>School District/Entity</u>	<u>Person Placed</u>
2015-2016	Alisal Union School District, CA	Dr. Hector Rico
2015-2016	Johnstonville Elem. School Dist., CA	Dr. Melanie Spears
2015-2016	East Dubuque School District, IL	Mrs. Tori Lindeman
2015-2016	Hemet Unified School District, CA	Ms. Christi Barrett
2015-2016	Ottumwa CSD, IA	Ms. Nichole Koolker
2015-2016	Rapid City Area School District, SD	Dr. Lori Simon
2015-2016	Francis Howell School District Saint Charles, MO	Dr. Mary Hendricks-Harris
2015-2016	Glendale Unified School District, CA	Mr. Winfred Roberson
2015-2016	Grand Island Public Schools, NE	Dr. Tawana Grover
2015-2016	Othello School District No. 147, WA	Dr. Kenneth Hurst
2014-2015	Penn Valley Union Elementary School District, CA	Dr. Torie England
2014-2015	Newcastle Elem. School District, CA	Ms. Denny Rush
2014-2015	Seattle Public Schools, WA (Director of Enrollment Planning)	Ms. Ashley Davies
2014-2015	Caney Valley USD 436, KS	Mr. Blake Vargas
2014-2015	Birmingham City Schools, AL	Dr. Kelley Gacutan
2014-2015	Cherokee Community School Dist., IA	Ms. Kimberly Lingenfelter
2014-2015	Chief Leschi Schools, Puyallup, WA	Dr. Amy Eveskcige
2014-2015	Colts Neck Township Schools, NJ	Ms. Mary Jane Garibay
2014-2015	Conejo Valley Unified School District Thousand Oaks, CA	Dr. Ann Bonitatibus
2014-2015	El Monte Union High School Dist., CA	Dr. Irella Perez
2014-2015	Gustine Unified School District, CA	Mr. William Morones
2014-2015	Hot Springs School District, AR	Mr. Mike Hernandez
2014-2015	San Juan Island School District Friday Harbor, WA	Dr. Danna Diaz
2014-2015	Sunnyside Unified School District Tucson, AZ	Mr. Steven Holmes
2014-2015	Unity Charter School, Morristown, NJ	Ms. Connie Sanchez

2014-2015	Watson Chapel School District Pine Bluff, AR	Dr. Connie Hathorn
2013-2014	Arkansas Arts Academy(Benton County School of Arts), AR	Mrs. Mary Ley
2013-2014	Caddo Parish Public Schools Shreveport, LA	Dr. Theodis Lamar Goree
2013-2014	Fallbrook Union High School District, CA	Dr. Hugo Pedroza
2013-2014	Gardner Public Schools, MA	Ms. Denise Clemons
2013-2014	Hermitage School District, AR	Dr. Tracy Tucker
2013-2014	Mary M. Knight School Dist., WA	Dr. Ellen Perconti
2013-2014	Winship-Robbins Elem. Schools, CA	Dr. Laurie Goodman
2013-2014	Valley Springs School Dist., AR	Ms. Judy Green
2012-2013	Clarke Comm. School District, IA	Ms. Bonita Gonzales
2012-2013	Eatonville School District, WA	Ms. Krestin Bahr
2012-2013	Galena Unit School District #120, IL	Dr. Sharon Olds
2012-2013	Goshen County School District Torrington, WY	Ms. Jean Chrostoski
2012-2013	Hot Springs School District, SD	Mrs. Danielle Root
2012-2013	Ladue Schools, St. Louis, MO	Dr. Donna Jahnke
2012-2013	Laguna Dept. of Education, NM	Mr. Emmanuel "David" Atencio
2012-2013	Little Rock School District, AR	Dr. Dexter Suggs
2012-2013	McCleary School District, WA	Ms. Tita Mallory
2012-2013	Santa Fe Indian School, NM	Mr. Roy Herrera
2012-2013	Texarkana School District, AR	Mrs. Becky Kesler
2011-2012	Bainville School, MT	Mrs. Renee Rasmussen
2011-2012	Duval County Public Schools Jacksonville, FL	Mr. Nikolai Vitti
2011-2012	Jenks Public Schools, OK	Ms. Stacey Butterfield
2011-2012	Magnet Schools of America, DC (Executive Director)	Mr. Scott Thomas
2011-2012	North Kitsap School Dist., Poulsbo, WA	Ms. Patrice Page
2011-2012	Polson School District, MT	Dr. Linda Reksten
2011-2012	Reynolds School District, Fairview, OR	Mrs. Linda Florence
2011-2012	Skykomish School District, WA	Ms. Edwina Hargrave

**RESCUE UNION
SCHOOL DISTRICT**

PROPOSAL FOR



Dave Long & Associates

SUPERINTENDENT SEARCH

**36 Loretta Drive
Laguna Beach, CA 92651
(916) 616-6027
(805) 331-4287**

www.DLAssoc.com
February, 2017



Executive Search Services

December 15, 2015

Board of Education
RESCUE UNION School District
Nancy Brownell, President of the Board
2390 Bass Lake Rd.
Rescue, CA 95672

Dear President Brownell and Other Members of the Board:

Thank you for expressing an interest in Dave Long & Associates possibly assisting the RESCUE UNION School District Board of Education in conducting a search for its next superintendent. We are extremely interested in working with you in this important endeavor. We admire and congratulate you on your district's description "Where Staff, Students and Community Strive for Excellence in Education".

Before describing our services, I would first like to introduce myself and our firm. My professional career has spanned over 40 years and includes a background of experiences in classroom teaching and administration. I have served as assistant principal, school principal, assistant superintendent, district superintendent, county superintendent of schools and most recently Secretary of Education for the State of California. These experiences have made it clear to me that the superintendent of schools and school board establish a foundation for effective governance. Ultimately this provides vital leadership for the school system to serve children and the community. Thus, hiring a superintendent is one of the most important decisions your Board will ever make. I have a strong desire to assist you in this important function.

As you may know, a number of years ago the California School Boards Association decreased its involvement in superintendent searches. My firm was fortunate to acquire the services of their top consultants, all who have enjoyed distinguished careers in education. They bring a rich background of success in having served as lead search advisers for many school districts throughout the state. For several years prior to that, they each assisted in executive searches by acting as professional screeners. We have also added the talents of other retired superintendents who have served long, successful careers in California public school districts. Our firm consists of 31 consultants, advisers, executive assistants and technological personnel who all work together to serve our clients.

February 2017

Page two

I am also a search consultant having performed those duties as a county superintendent of schools and after as a Dave Long & Associates Executive Search team member. I believe our unique backgrounds, experiences, and relationships developed over decades working as superintendents and search advisers bring a high level of expertise to the executive search process. Our team of consultants and associates appreciate the uniqueness of each district and will design our search processes to be flexible in order to meet your needs.

We are particularly proud of our ability to recruit a diverse candidate pool that not only meets the leadership profile set by the board, but is reflective of the composition of the communities served by the district. Through their extensive professional activities, our consultants and associates maintain contacts with individuals who are representative of our state's diverse population. This sophisticated network of contacts is enhanced by a strong recruitment campaign. We are committed to recruiting a field of candidates that is reflective of the qualities, traits, experiences, background and training sought by the board in its next superintendent. Our guarantee is that if the board is not satisfied with its pool of candidates following interviews, we will continue the search for expenses only.

If Dave Long & Associates is selected to assist you in the search, subject to Board approval, Mr. Paul Tichinin will be the lead consultant advising the Board and he will be assisted by our full staff. Mr. Tichinin's biography is attached for your review. Please note that Mr. Tichinin is especially qualified to advise a district such as RESCUE UNION SCHOOL DISTRICT as he is familiar with the area and county.

Our all inclusive fee to conduct the search as described later in this proposal will be \$14,950. This includes all consultant expenses; distribution through the Internet of a basic brochure; advertising on websites and in publications of the Association of California School Administrators (ACSA) *EdCal*, School Services of California and Dave Long & Associates; through our extensive networks aggressively recruiting candidates who meet the Board's leadership profile; correspondence with candidates; assistance with development of interview questions; scheduling of appointments; and other activities associated with the search. It also includes **at no additional cost** a Leadership Transition Workshop with the Board and the new superintendent at the conclusion of the search.

You will find that this proposal provides an excellent overview of our services – services that can be modified in accordance with the highest standards of professionalism and your wishes. Our fundamental goal is to assist the Board in making the right match of a superintendent for your district and community.

The dedication of our advisers to finding the best match of candidates and the Board adopted leadership profile accounts for our high rate of success. Of all the searches conducted by our advisers over the last five years, 93% of the superintendents selected for these positions are still serving in those roles.

Listed below is the information from some of the previous searches we have conducted. If you would like more, please feel free to contact us.

District	ADA	Contact	Telephone
Santa Paula U.S.D.	5400	Diana Ponce-Gomez	(805) 798-3821
Redding U.S.D.	3200	Denise Yergenson	(530) 225-0011
Needles U.S.D.	846	Bob Smith	(760)285-4020
South Whittier	3,800	Jan Baird	(562) 944-9308
Claremont U.S.D.	7,000	Jeff Stark	(909) 624-3949
Carlsbad U.S.D.	10,000	Kelli Moors	(760) 672-7820
El Rancho U.S.D.	9,500	Jacki Cisneros	(562) 942-1500

We look forward to a positive response to our proposal and the opportunity to meet with you. If we are selected to assist you, work will be conducted from the offices of our staff. In the meantime, if you have any questions about Dave Long & Associates Executive Search Services or our proposal please feel free to contact Mr. Paul Tichinin at 707-489-2187, or me at (916) 616-6027.

Sincerely,

David Long, President
Dave Long & Associates Executive Search Services

Dave Long & Associates

Executive Search Services

is pleased to provide a proposal to the

RESCUE UNION SCHOOL DISTRICT

Board of Education

Nancy Brownell, President

Kim White, Vice President

Suzanna George, Clerk

Stephanie Kent, Trustee

Tagg Neal, Trustee



Dave Long & Associates

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DAVE LONG & ASSOCIATES EXECUTIVE SEARCH SERVICES

Reasons why you should choose Dave Long & Associates Executive Search Services (ESS) to assist you in the most important decision you will make as a Board . . . the selection of a new superintendent.

We're accountable to you . . . and you are in control . . .

As your adviser, DLA ESS works for you. The Board is the decision-maker, and the advisers provide logistics and vital information to the Board with which to make the best decisions. From the initial planning meeting and throughout the entire process, DLA advisers will work with you and will be available to guide you and provide direction as needed.

We develop a leadership profile . . .

Gathering information from all stakeholders in the district is one of the first and most important steps in our process. All individuals in the community – including board members, faculty, parents, and staff members – are encouraged to set up an interview with the DLA adviser to discuss the characteristics they would like to see in a new superintendent. Individuals representing groups such as bargaining units, the PTA, site council, etc., are encouraged to meet with the adviser. In addition to the interviews, the adviser may also visit various sites, hold group meetings and/or open forums, or any combination of those activities. The adviser may also receive written input from all segments of staff and the community.

We use our network to aggressively recruit top candidates . . .

Our DLA advisers, all former distinguished superintendents of schools, have had long, successful careers in education. We continue to maintain contacts and a sound network across California and the nation. Participation at conferences and workshops helps us to maintain contacts and develop new relationships with highly talented individuals. We aggressively recruit candidates, many who might not be seeking a new position, who meet the leadership profile adopted by the Board.

Our application process is rigorous . . .

Applicants are asked to respond to challenging questions and demonstrate their experience in educational leadership. Applicants provide copies of their degrees and credentials for verification as part of the process.

We use professional paper screeners . . .

DLA ESS uses professional screeners to paper screen the applicants against the criteria and leadership profile established by the Board. The screening process is designed to optimize the objective assessment of professional qualifications and experience.

We share all application materials from candidates with the Board . . .

DLA ESS maintains an open, transparent search process with the Board while ensuring maximum confidentiality for candidates. A critical part of that process is to make available to the Board all application materials received from candidates prior to determining which individuals will be invited for interviews. Our credo is “no surprises.” The Board is in charge of the selection process and must be privy to all information that will help make the important decision of who will be its next superintendent.

We do thorough reference checks . . .

It is past performance, more than anything else that will predict future success. A candidate’s track record is the best indicator of how he or she will perform as superintendent in your district. After a review of all applicant files, the professional screeners will develop a list of individuals who most closely meet the leadership profile. They will conduct employment and reference checks on those individuals and present recommended candidates for first round interviews, sharing with the Board the results of the reference checks.

A national organization will conduct a federal criminal search, SSN trace, credit report, state and federal sex offender registry, and motor vehicle background checks on the finalist to be offered the position. That individual will be asked to provide certified transcripts that verify his/her academic degrees and proof of administrative credential(s) in order that the district can complete its final employment process.

We actively involve stakeholders . . .

Community/Staff Engagement is included in our standard contract. It requires time in the district for the advisers to gather information about the district and its needs. There are variations of community engagement in the search process that may be selected by a Board. These would include, but are not limited to:

Community/Staff Engagement Standard Version . . .

This process includes:

- Development of advertising, data-gathering and other materials
- Individual meetings with board members
- Individual meetings with key district office and site leadership
- Individual meetings with association/union leadership
- Individual meetings with key stakeholders: parent/community/business leadership
- An open forum for general public and internal staff
- Web-based survey on district website
- Telephone interviews with key stakeholders unable to be present for individual face-to-face interviews or group meetings
- Compilation of input received through questionnaires distributed at various school district offices or e-mails sent to the adviser

We communicate with the Board throughout the entire process . . .

DLA advisers pride themselves on maintaining ongoing and timely communications with the Board throughout the entire search process. Board members will be provided with the adviser's e-mail address, cell phone number, and home contacts. In most cases an inquiry will be responded to within 24 hours, most often in a matter of hours. The adviser will also share questions from individual Board members and the answers with the entire Board in order that each member is fully apprised of the progress of the search. Our adviser will provide periodic written updates to the Board throughout the search.

We facilitate the community visit of the prospective Superintendent . . .

To affirm your choice, the entire Board, or a subcommittee of the Board, is encouraged to visit the community of the finalist. The search adviser will facilitate the visit but does not normally join the Board in the actual visitation.

We value and maintain confidentiality and communication . . .

Our search process is confidential. Confidentiality is also a top priority with the candidates' files. All applicant files are maintained in a secure area.

We assist the Board and its legal counsel in contract discussions with the successful candidate . . .

If the Board wishes, the adviser will provide assistance to the parties as the contract of employment is drafted and negotiated with the successful candidate. Our advisers, although not attorneys, know typical superintendent contract provisions desired by both candidates and boards. Even though DLA and its advisers stand ready to assist the Board, we urge boards to follow the advice of their district's attorney.

We provide at no additional cost a Board/Superintendent workshop at the conclusion of the search . . .

Upon selection of your new superintendent, a DLA adviser will provide your Board and the superintendent with a three-hour workshop to help the new governance team forge an effective working relationship. This helps the governance team immediately create a climate for open communication, develop preliminary protocols, and establish a customized orientation/transition plan. **This important workshop is included at no additional cost to the district.**

We maintain contact with the new superintendent and Board after the search has been completed . . .

Once the search has been completed, Dave Long & Associates Executive Search Services advisers maintain contact with the new superintendent and governing board for a period of up to two years. One of the reasons our advisers have such an outstanding record of successful searches where the new superintendents have withstood the test of time is due to our follow-up contacts. For the most part these are of an informal nature at no extra cost to the district. Our main goal is to ensure that the working relationship among the parties continues to be positive.

Boards who have been assisted by our advisers hire superintendents who enjoy lengthy, successful careers with the district . . .

When one examines the total number of searches performed by our advisers over the last five years, they find that 93% of the superintendents selected by these school boards are still successfully serving in those positions. This lengthy tenure is virtually unheard of in the search field. We attribute this high rate of success to extensive work done by our advisers in the search process to obtain a good match of the candidate with the board and follow-up contacts to ensure that the parties perform well as a governance team.

We offer additional services beyond the executive search services . . .

In addition to conducting executive searches, Dave Long & Associates provides a number of additional services to school districts. Our firm has three components. These are The Achievement Group, The Leadership Group, and the Executive Search Group. Each division conducts workshops, provides consulting and coaching services, and assists school districts in maximizing their governance responsibilities.

Listed below are a few of the services provided by each division:

The Achievement Group

- Curriculum and Instruction Workshops
- Instructional Coaching
- Research and Evaluation
- Assessment Support
- Measurement & Accountability Support
- Technical Assistance
- Troubleshooting

The Leadership Group

- Speaking (keynotes, presentations, etc.)
- Board/Superintendent Relationships Coaching
- Assist the District's Governance Team in Building and Maintaining Positive Board/Superintendent Relations
- Team Building
- Strategic Planning
- Coaching New Superintendents
- Assist Boards and Superintendents in Creating and Maintaining a Superintendent Evaluation System Linked to District Strategic Goals

The Executive Search Services Group

- Conduct Executive Searches
- Assist in Finding Interim Superintendents
- Consult with Boards on Resolving Conflicts Prior to the Superintendent Search
- Meet with Boards to Discuss the Executive Search Process and Review Options Available to Governing Bodies in Selecting a New CEO
- Conduct Transition Workshop when New Superintendent is Selected

At your convenience we would be happy to discuss in greater detail these additional services and price structures.

We guarantee our work . . .

We guarantee our service to your satisfaction or we will conduct the search again (*within the first year of the superintendent's contract if the Board members remain unchanged and providing the Board selected one of the candidates the DLA ESS advisers found to be professionally qualified and recommended to the Board*) for expenses only. Also, if the initial candidate pool is unsatisfactory to the Board, we will continue the search for expenses only.

POSSIBLE TIMELINE OF ACTIVITIES ASSOCIATED WITH THE RESCUE UNION SCHOOL DISTRICT SEARCH

These activities are performed in a typical search. Dave Long & Associates Executive Search Services will modify these activities and corresponding timeline to meet Board desires and District needs.

(NOTE: Specific dates dependent on Board's schedule and when search begins.)

1. March* Planning Meeting to determine process, scope and agree to timeline. Board is given binders with information to be used throughout the search.

Announcement of position vacancy on DLA web site—recruitment begins.

2. March Community/staff input. Allow enough time to advertise that adviser will be in the district for community input. DLA will provide a list of potential contacts, sample press releases, staff bulletins and letters to employee organization leaders. District contact person will distribute announcements, letters, etc.

3. Adviser drafts criteria, leadership profile and sends to Board for review.

4. * Board reviews criteria and approves brochure language.

Once the brochure is approved, active, aggressive recruiting of individuals who meet the approved criteria and leadership profile begins on a state wide basis. DLA arranges for advertising in ACSA's EdCal publication.. Advertising of the position will also occur on web sites of the, School Services of California and Dave Long & Associates Executive Search Services. District contact person will be requested to place the vacancy notice and recruitment information on Ed Join and the district's web site.

All application materials will be submitted electronically to DLA ESS and maintained as working notes for the duration of the search.

Board begins development of interview questions. Sample interview questions will be provided and Board members may create their own questions for consideration by the rest of the Board. .

5. Initial interview questions due to DLA on a predetermined date.
6. ** Board develops final interview questions. *Final interview questions due to DLA on a predetermined date. Adviser available to Board for questions.*
7. Final interview questions due to DLA. *These will be compiled by DLA and returned as part of the interview packets provided at the time of candidate interviews.*
8. Applications close. *This allows ample time for advertising, aggressive recruiting and for candidates to apply for the position.*
9. Paper Screening by DLA Professional Screening Committee. *Board is provided with copies of each candidate's application and other supporting materials. These records will be held at the district office under strict security and will be available ONLY to Board Members of the RESCUE UNION School District.*
10. DLA Professional Screening Committee members perform reference checks and Board members may individually review application materials of all candidates at the district office.
11. ** Board meets with the DLA Professional Screening Committee to receive its report and determine candidates to interview.
12. ** First Level Interviews by Board. *Time for each interview is approximately one hour and fifteen minutes with breaks between candidate interviews and lunch. Adviser facilitates process.*

Board determines candidates for second-level interviews.
13. ** Board conducts second-level interviews. *Normally this involves no more than two candidates being interviewed for approximately one hour and fifteen minutes each with a break between interviews, time for lunch, etc. Adviser begins to notify unsuccessful candidates. Adviser requests federal, state criminal, financial, driving, academic and related background check on finalist to be offered the position.*
Board makes tentative selection of top candidate.
14. Subcommittee of Board visits community of top candidate. *Working with the finalist, adviser will facilitate these meetings but will not attend unless specifically requested to do so by the Board. Unless a quorum of the Board participates in the visit, this does not constitute a meeting of the Board. The Board is advised to consult with legal counsel if a quorum of the Board participates in the community visit.*

15. **TBD**** Following the return of the members who participated in the community visit, a report is made to the full Board on findings. *If the findings are positive, the Board makes tentative selection of its top candidate for the position. The Board initiates contract talks with the finalist. DLA adviser will assist, but the Board is encouraged to also make use of its legal counsel in the drafting of a contract of employment for the superintendent-elect.*
- Board selects new superintendent.
16. **TBD*** Following successful negotiation of a contract of employment, Board takes action to hire superintendent and introduce them to community.
17. **TBD*** Soon after the new superintendent assumes their duties, the DLA consultant will conduct a Leadership Transition Workshop with the Board and New Superintendent. **(No additional charge.)**
18. **TBD** The adviser will maintain contact with the Board and Superintendent subsequent to the search and be available to lend assistance when needed.

**Board meeting—Open*

***Board meeting--Closed*

RECOMMENDED ACTIVITIES FOR THE RESCUE UNION SCHOOL DISTRICT SEARCH

The steps outlined above incorporate our recommendations to the RESCUE UNION School District Board of Education as to how we believe the search should be conducted. We believe the search should be conducted throughout California in order to secure the largest possible field of candidates that meet the Board's adopted leadership profile.

We also recommend that the selection process be closed in that stakeholder involvement would be held to providing input on the qualities, traits, experience, and training of the ideal candidate. Under this approach there would be no separate interview panels composed of stakeholders to meet with applicants. All activities after the community, staff, and other interest groups in the district have provided input as to a leadership profile would be accomplished by the Governing Board and adviser in a closed setting as permitted by the Brown Act.

Over the years we have found that this approach affords the greatest confidentiality for candidates and ultimately yields the best field of applicants. Some candidates, particularly seated superintendents, will not make application to a district using interview panels composed in part or entirely of stakeholders. It is also well-established that the hiring of the superintendent is the sole responsibility of the Governing Board composed of trustees elected by the public. As such their responsibilities cannot be delegated to other individuals or groups.

We also recognize that local conditions may require a more "hands on" degree of involvement by stakeholders. We would be pleased to discuss these variations and their possible ramifications with you. Depending on the type of stakeholder involvement required above and beyond that suggested in this proposal, the amount of consultant time involved to assist additional participants in the search process could be increased. In that case there might be a modest increase in the fees quoted in this proposal.

**Dave Long & Associates Executive Search Services
Sampling of Searches Completed DLA Advisers**

<u>District ADA</u>	<u>Name of District</u>	<u>District ADA</u>	<u>Name of District</u>
12,500	New Haven USD	24,000	Grossmont Union HSD
10,500	Natomas USD	1,380	Mother Lode Union SD
310	Hughes-Elizabeth Lakes Union ESD	17,915	Murrieta Valley USD
19,000	Val Verde USD	1,500	Mountain Empire USD
6,000	Lawndale ESD	30,000	Modesto City Schools
3,600	Gateway USD	2,900	Coronado USD
2,072	Old Adobe Union ESD	7,400	San Jacinto USD
126	Alexander Valley SD	23,000	Palm Springs USD
3,712	Santa Paula ESD	3,000	Rincon Valley USD
640	Curtis Creek ESD	4,410	Placerville Union ESD
9,045	Pittsburg USD	5,144	Benicia USD
18,082	Pajaro Valley USD	6,000	Ukiah USD
1,730	John Swett USD	1,150	Fall River Joint USD
16,700	Paramount USD	900	Esparto USD
7,137	Perris Union HSD	2,500	Healdsburg USD
3,300	Redding SD	42,000	San Juan USD
17,000	Panama Buena Vista SD	5,400	Santa Paula USD
9500	El Rancho USD	846	Needles USD
30,000	Desert Sands USD		

Note: Contact information available on request

AGREEMENT FOR ASSISTANCE IN SELECTING A SUPERINTENDENT

This agreement is entered into by the RESCUE UNION School District (hereafter District) and Dave Long & Associates Executive Search Services (hereafter DLA).

DLA AGREES

1. To meet with the governing board of the RESCUE UNION School District (hereafter Board) as required to assist and advise it throughout the search.
2. To meet with individuals and groups, including board members, employees, community members, and others who express an interest in the selection process. In the interest of an orderly and timely process, DLA may, in its discretion and after consulting with the Board, limit the number and time of such meetings.
3. To develop for Board approval and electronically distribute a recruiting brochure announcing the position.
4. To recruit candidates that DLA believes are qualified for the position.
5. To answer inquiries from interested persons concerning the position.
6. To collect and process applications and communicate with persons applying for the position.
7. To recommend qualified people to aid in the recruitment and selection process as necessary.
8. To conduct employment and reference checks on candidates recommended to the Board for interviews.
9. To assist the Board in preparing for candidate interviews.
10. To notify all unsuccessful candidates and thank them for applying.
11. To request a criminal and related background check on the finalist selected by the Board as its prospective superintendent.
12. To facilitate a Board visit to the community of the Board's selected individual.
13. To hold the district harmless, indemnify and defend the district from any and all liability arising from the search and recruitment activity referred to herein, unless such liability resulted from negligence or malfeasance by the district or Board. The Board agrees to notify DLA within a reasonable time of receipt of any claim.

DISTRICT AGREES

1. To have all board members present at all meetings regarding the selection.
2. To have at least one or two members of the Board visit the community of the prospective superintendent to obtain satisfactory assurance of the individual's acceptability.
3. To pay any and all expenses incurred by the district board members in connection with the superintendent selection process.
4. To pay the travel expenses of second round candidates to be interviewed.
5. To make appropriate facilities available for conducting interviews and other business related to the search in progress.
6. To complete the final employment process.
7. To have legal counsel develop or review any agreement between the Board and the prospective superintendent.
8. To hold DLA and advisers/professional screeners harmless, indemnify and defend DLA, its advisers/professional screeners from any and all liability arising from the search and recruitment activity referred to herein unless such liability resulted from negligence or malfeasance by DLA. DLA agrees to notify the district or Board within a reasonable time of the receipt of any claim.

MISCELLANEOUS

1. This agreement may be terminated at any time by either party by giving written notice to the other. At such time, the district shall be invoiced by DLA for services and expenses incurred for work accomplished to date.

CONSIDERATION

1. In consideration for the above services, the district agrees to pay DLA an all-inclusive fee of **\$14,950, for the search described in this proposal.**
2. One-half of the fee, **\$7,475, for the search** is due and payable upon execution of this agreement by both parties. The remainder of the fee is due and payable upon receipt of an invoice at the conclusion of the search.
3. DLA guarantees its services to District’s satisfaction or DLA will conduct the search again (*within the first year of the superintendent’s contract if the board members remain unchanged and providing the board selected one of the candidates the DLA professional screeners found to be professionally qualified and recommended to the board*) for expenses only. In the event the initial field of candidates is not satisfactory to the Board, DLA will continue the search process for expenses only.

For purposes of communication between the parties, the following shall be deemed to be representative of the parties

**RESCUE UNION
SCHOOL DISTRICT**

**DAVE LONG &
ASSOCIATES**

Nancy Brownell
President of the Board

Dave Long
President
Executive Search Services

RESCUE UNION School District
2390 Bass Lake Rd.
Rescue, CA 95672

Dave Long & Associates
Executive Search Services
636 Loretta Drive
Laguna Beach, CA 92651

Phone: (530) 677-4461

Phone: (916) 616-6027

Signature

Signature

Date

Date

BIOGRAPHICAL INFORMATION

DAVID LONG, Ph.D.

Dr. David Long was appointed by Governor Arnold Schwarzenegger as the Secretary of Education in March 2007. In that role, he served as policy adviser to the Governor on education issues. Dr. Long has more than 40 years of experience in the field of education, ranging from 21 years of classroom teaching to the superintendency. He obtained his Ph.D. from Iowa State University. Prior to his appointment by the Governor, Dr. Long was the Riverside County Superintendent of Schools.

In 2008 after leaving the Secretary of Education position, he formed Dave Long & Associates. This is a full-service educational leadership organization that assists school districts in improving student performance, effectively using data for informed decision-making, building effective governance teams and conducting superintendent searches.

Dr. Long is the immediate past President of the California County Superintendents Educational Services Association (CCSESA). He was named Chairperson of the Federal Education Safe and Drug Free Schools and Community Advisory Committee by former Secretary of Education Margaret Spellings. He has been honored as California Administrator of the Year by the National Organization of Partners in Education, Superintendent of the Year, and received the Governor's Award for school leadership. He was also honored as the Inland Empire Entrepreneur of the Year for his innovative approach to raising student achievement through the Riverside County Achievement Teams.

He has also received the prestigious Marcus Foster Memorial Award from the Association of California School Administrators for outstanding leadership and significant contributions to public education by a school administrator.

Dr. Long is deeply involved in communities. He is one of the First 5 Riverside commissioners, earned the Lifetime Achievement Award from 23rd District PTA, and Lifelong Learning Award from the Boy Scouts of America.

Dave and his wife, Joanne, previously a principal in the Corona-Norco Unified School District, have two daughters, Angelica and Vika. In addition, Dr. Long has four adult children and 12 grandchildren.

PAUL TICHININ

Mr. Paul Tichinin joined Dave Long & Associates after more than 40 years of experience in public education. He most recently served and retired as the County Superintendent of the Mendocino County Office of Education. He was first elected as the County Superintendent in 1994 and reelected to four additional terms of office. In the position of County Superintendent, Paul served 12 school and community college districts with a budget of over \$36 million which included the SELPA budget, which allowed him to help meet the needs of almost 14,000 students. Paul's other professional experiences include substitute teaching, counselor, program coordinator, resource teacher, director, as well as school and district administrator before becoming a county superintendent. He also served as a district superintendent and as a State Board of Education appointed State Trustee while serving as Mendocino County Superintendent.

Mr. Tichinin received his Bachelor's Degree in Social Science/Economics from Cal State University, Hayward and his Master's Degree in Administration/Vocational Education from Cal State University, Long Beach. Paul has two educational publications to his credit and has worked on numerous county, regional and state-wide grants and projects. He has served as a special and vocational consultant and has been appointed to a wide variety of community and board positions.

When Mr. Tichinin was the Superintendent of the Mendocino County Office of Education, he was a member of and involved in numerous community boards and professional organizations. Paul worked with the First 5 Commission and is current Chairman, the Fiscal and Crisis Management Assistance Team (FCMAT) and the CCSESA Technology and Telecommunications Steering Committee.

Mr. Tichinin has always been dedicated to public education and takes special pride in a lifetime of contributions he has made to the field of education. He is especially proud of the relationships he has established with teachers, classified employees, administrators and board members with whom he has worked.

Mr. Tichinin and his wife are proud parents of two daughters and currently reside in Fort Bragg, CA.

**SAMPLE LETTERS
OF RECOMMENDATION**

June 1, 2016

To Whom It May Concern,

It is truly my pleasure to write this letter of recommendation regarding the stellar executive search services provided by Dave Long & Associates. Recently I had the good fortune to participate in the firm's process for the selection of a superintendent for a grades 9-12 high school district. As everyone knows, there is so much anxiety associated with the filling of a superintendent position. The members of the community feel it, the school district staffs feel it, the Board of Education members feel it, and of course, the candidates feel it. With such high personal and professional stakes involved in this process it is comforting and motivating to know that a company exists that can support school districts and all stakeholders involved in such a critically important hiring process. Districts need only to contact Dave Long & Associates to receive clear, client focused services and guidance. Dave Long and Associates supports the identified hiring goals of school district Boards by obtaining stakeholder involvement, leading the candidate recruitment process, and ultimately laying out a clear and fair selection process that identifies a leader who is the best match to the district for the complex role of school superintendent.

As stated before, I participated in the recruitment process lead by Dave Long & Associates and found it to have the following characteristics:

- Clear, consumable information regarding the school district, position, the community and School Board
- The identified selection criteria was thorough and personalized to the school district
- The consultants were consummate professionals who were experienced, accessible, honest, ethical and helpful in all interactions
- The process, from application through interviewing, was transparent with exceptional service and quick contact for all information needs of candidates.
- Maintenance of the high levels of confidentiality at all stages of the process

It is with a strong sense of satisfaction that I share that I was selected to serve as superintendent in the school district mentioned above that utilized the services of Dave Long & Associates. From the point of view of an applicant I can testify that the consultants were thorough and rigorous in the background reviews and in support of the school Board during the interview process. Best of all, the firms services have not stopped at the end of the interview/selection process. The firm is supporting the Board and I in the employment contract formation and approval process and will be providing us with a Board workshop in the near future that focuses on Board/Superintendent relations and goal setting.

In closing, I give an unconditional recommendation that all School Board's give serious consideration to the awarding of contracts for executive level search needs to Dave Long & Associates. You and your stakeholder groups will be well cared for and duly impressed.

Sincerely,

Timothy D. Glover, Ed. D.



MAGNOLIA EDUCATORS ASSOCIATION



P.O. Box 2515, Anaheim 92814 | meaboard@gmail.com

June 30, 2015

Dear Dave Long and Associates,

As president of the Magnolia Educators Association, it has been my pleasure to observe as your company has assisted the Magnolia School District in a search for a new superintendent over the last couple of months.

Throughout the entire process, the members of your company have worked with the staff of Magnolia School District and the union leadership in a manner of the utmost integrity. Interviews were set up with staff and with the leadership of MEA and with the classified union leadership. For the first time in several years, we felt like someone was listening and giving us hope that things would improve in the Magnolia School District.

It was obvious that Dave Long and Associates was receiving opposition from the out-going superintendent, but your company handled the difficulties with amazing finesse and professionalism. Your staff rose above it all and did their job, making sure that the best possible choice for a new superintendent was made.

I believe that Magnolia School District employees are now assured of a future of excellence in leadership and therefore excellence in educating students. I know that it could not have been done without the hard work of Dave Long and Associates. Bless you and thank you for all of your hard work. Please feel free to contact me, (714) 403-5586, if I can be of service to your company.

*Sincerely,
Pamela Greenhalgh, President
Magnolia Educators
Association*

Hope School District Board of Trustees
3970 La Colina Rd
Santa Barbara, CA 93110

17 June 2016

Trudy Arriaga
Dave Long and Associates
636 Loretta Drive
Laguna Beach, CA 92651

To whom it may concern:

I am pleased to recommend the Superintendent search services provided by Dr. Trudy Arriaga and her team at Dave Long and Associates. Upon selecting them as our search firm, Dr. Arriaga tailored a calendar around the board members' busy schedules. At meetings, she was well prepared and able to give us specific answers to all of our questions. Her flexibility and dedication allowed us to complete the process according to the original timeline, giving the board extra time needed to negotiate and review the contract.

Ms. Arriaga and her team did a thorough job of gathering information, both from the community stakeholders and the board, to create a profile and selection process that identified many qualified candidates. While she provided the board members with a great deal of guidance and candidate background information, she respected the fact that ultimately the decision was to be made by the board. Throughout the process she was professional, accessible, and confidential with all sensitive information.

In the end, we could not be happier with our choice of the new Superintendent. I credit Dr. Arriaga and the team at Dave Long and Associates with bringing us a candidate who is a great fit for our district.

Sincerely,

Dan Cunnison
Board President
Hope School District
Santa Barbara, CA



December 28, 2016

To Whom It May Concern:

As a trustee of the Auburn Union School District from 2012-2016, and Board President for the last two years, it is my pleasure to write a letter of recommendation for Dave Long and Associates. The firm provided top quality service last year during the search and selection of our current Superintendent. The Auburn Union School District (AUSD) educates 2100 students in preschool through eighth grade at four elementary schools and one middle school.

Cathy Bean led our search process, supporting the board and customizing the superintendent search to AUSD needs. Cathy's extensive experience in working closely with school boards and understanding the complex needs of school districts today resulted in a positive outcome.

In closing, the AUSD Board truly appreciated the professionalism - and engagement - that the Dave Long team provided. If you would like to talk to me about our experience, you can contact me at 916-871-2308.

Sincerely,

A handwritten signature in blue ink that reads 'Sandra M. Scott'.

Sandra



*Where EVERY Student is Given EVERY Opportunity to
Demonstrate EXCELLENCE*

12820 PIONEER BOULEVARD, NORWALK, CALIFORNIA 90650-2894
PHONE (562) 868-0431 • FAX (562) 868-7077

August 3, 2016

To Whom It May Concern:

The Board of the Norwalk-La Mirada Unified School District would like to take this opportunity to recommend your consideration of Dave Long and Associates as an executive search firm. What a pleasure it has been to work with Dave Long & Associates (DLA). From our first conversation, through the Board Workshop that was done after the new Superintendent was hired, it has been a seamless process. Our Board members, community members, teachers association, classified staff and students themselves all felt like they were heard and a part of the process to hire our Superintendent thanks to public meetings that were held by DLA. The buy in by all the stake holders for our new Superintendent has been amazing and all parties are thrilled with the outcome. This all started with the search firm process.

All of the candidates that we interviewed were highly qualified for the job, but the person that we retained was a perfect match for our community and our district. Dr. Joe Condon and his team worked to ask us all of the right questions so that we could come up with the perfect result. The process of coming up with questions for the candidates, screening the pool of candidates and even coming up with the right place to hold the interviews was handled with professionalism. Even down to the smallest details on how the room was set up for the interviews made our Board feel at ease with the process.

Dr. Condon and his team communicated with me every step of the way so I did not ever feel lost or surprised by the process. I appreciated the open, honest feel and the fact that I could contact DLA anytime with questions no matter how big or small.

Dr. Joe Condon and Dr. David Verdugo helped our Board understand all facets of the process. This is the most important job a Board has and I cannot think of another team I would want to work with me. I cannot imagine finding anyone else that could work better with so many different types of people and help get the best result for your school district. Their wealth of experience, the network they have created and the reputation that they have developed make them the perfect group to help your district attract the best candidate pool.

Please feel free to contact me if you have any question about the experience that our District had with our process. I cannot thank Dr. Condon enough for finding the perfect match for our district.

Warm Regards,

Karen Morrison
Board President



SUPERINTENDENT SEARCH

Ed Manansala, Ed.D.
El Dorado County
Superintendent of Schools

Coleen M. Johnson
Executive Director
Personnel Services

February 2017

SUPERINTENDENT SEARCH SERVICES

This document is submitted as an overview of the services provided by the El Dorado County Office of Education in assisting local school districts with the Superintendent Search.

The County Office of Education will design the Superintendent Search program to the desired needs of the school district. It is paramount in taking on the responsibility of assisting the school district that the County Office of Education staff meets with the governing board to design the specific type of program desired.

Depending upon the desires of the local governing board, it is proposed that community/staff input and involvement be considered in the Superintendent Search process. The County Office of Education can design a model for such input and assistance. County Office of Education staff will also be involved in working with the school district in finalizing the desired qualifications of the candidates.

The County Office of Education will handle all of the announcements and receipt of applications and confidential papers from the applicants.

The paper screening will be handled by County Office of Education staff in cooperation with the desires of the district, utilizing professional educators.

The interview process will generally consist of community representatives and parents as well as staff from the school district in making recommendations to the Board of Trustees. It is proposed that the screening and initial interview process will generate between three and five candidates to be interviewed by the Board of Trustees.

ADVANTAGES OF SUPPORT SERVICES FOR SUPERINTENDENT SEARCH

1. Use of Personnel Knowledge of the Community in the Selection Process

The services for Superintendent Search involve superintendents in similar sized districts assisting with paper screening and/or evaluation of candidates' technical skills.

2. Reasonable Cost

The cost of Superintendent searches has been increasing in recent years. Many districts are paying between \$10,000 and \$15,000 for searches. The County Office of Education is offering a local alternative to school districts, which will result in substantial savings.

3. High Level of Local Involvement

Many districts, as they seek a new superintendent, relinquish control to an outside agency. The County Office of Education's services encourage participation by the board, staff, parents, and community at various levels throughout the process.

OVERVIEW

SUPERINTENDENT SELECTION PROCESS

I. Tasks of El Dorado County Office of Education

1. Meet with Board to determine procedures and calendar of events.
2. Receive Board/Staff/Community/Parent input through interviews and surveys.
3. Prepare draft brochure for Board approval; print and distribute final brochure.
4. Recommend Paper Screening Committee to Board.
5. Assist Board in determining District Interview Team membership.
6. Advertise position, prepare application packets, set up applicant files.
7. Lead the Paper Screening Team in the applicant screen process.
8. With the Paper Screening Team, check references for possible finalists.
9. Recommend selected candidates to the Board for interviews.
10. Arrange logistics of interview, i.e., schedule, packets, meals, etc.
11. Assist District Interview Team in the interview process, i.e., procedures, questions, etc.
12. Report to Board regarding recommended finalists.
13. Assist Board in final interview with extensive reference checks and scheduling the community visit.
14. Coordinate contract negotiations with the Board and the Board's attorney.
15. Assist Board in introducing the new Superintendent to the staff and community.

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SECTION I

SCREENING PROCESS

CHECKLIST

AND

RECOMMENDED TIMELINE

The process for the selection of a new Superintendent is explained to the Board of Trustees. An outline of the services provided by the County Office of Education is presented.

A recommended timeline for the Search is presented.

SCREENING PROCESS CHECKLIST

1. Meet with Board of Trustees to determine the following:

Timeline

- Board Input
- Community/Staff/Parent Input
- Finalize Announcement
- Distribute Announcement/Receive Application
- Close Receipt of Applications
- Paper Screening
- Initial Interviews
- Board Interviews
- Visitations
- Final Decision

Requirements

- Education
- Experience

Salary, Benefits and Contract

- Minimum Salary
- Length of Contract
- Types of Benefits

General Qualifications the Board Desires, e.g.

- Knowledge of the Budget
- Elementary School Educational Program
- Employer/Employee Relations
- Special Programs Including Special Education

Screening Process

- Community, Parent and Staff Input
- Screening Committees
- Board of Trustee Involvement

2. Receive Community and Staff Input (If Desired by Board of Trustees)
3. Develop Brochure and Finalize with the Board of Trustees
4. Develop Application
5. Develop and Distribute Announcement to EDCAL, Placement Agencies, etc.
6. Set Up Screening Process
 - Paper Screening Committee (Educational Consultants)
 - Interview Committee (Consultants, Parents, Staff and/or Community)
(Model to be Determined by Board of Trustees)
7. Finalists to Board of Trustees for Interviews and Possible Visitations

EXAMPLE

**XYZ SCHOOL DISTRICT
SUPERINTENDENT/PRINCIPAL SEARCH – 20__
Timeline/Process**

Date	Process
January 25	Board/Advisor Planning Meeting <ul style="list-style-type: none"> a) Review Calendar of Events/Timeline and Process b) Discuss Process c) Board Approves EDCOE as Search Consultants
February 3	Community/Staff Forums Re: Candidate Qualifications through Interviews and Surveys – Staff 3:00 PM – 4:30 PM/Community 5:30 PM – 7:00 PM <ul style="list-style-type: none"> a) Online survey and hard copy surveys made available
February 12	Online Survey Closes & Hard Copy Surveys due to District Office/EDCOE
February 22	Regular Board Meeting <ul style="list-style-type: none"> a) Advisors Present Report to Board on Results of Community/Staff Input b) Board Approves Brochure c) Board Determines Contract Parameters
February 23	Invitations for Interview Committee Members Go Out to Staff & Community Brochure & Cover Letter Distributed to Prospective Candidates, School Districts, etc. Advertise position – EdJoin, ACSA(EdCal) <ul style="list-style-type: none"> a) EdCal Publication Dates – (Include Dates)
March 8	*Special Board Meeting (Closed) <ul style="list-style-type: none"> a) Possible Meeting to Discuss Prospective Staff/Community Interview Committee
March 14	Regular Board Meeting <ul style="list-style-type: none"> a) Board Selects District Interview Team b) Board Determines Paper Screening Participants
March 31	Applications Close
April 4 (week of)	Screening Committee Reviews Applicants Cathy & Coleen Check References & Prepare Report to the Board
April 8	Special Board Meeting <ul style="list-style-type: none"> a) Screening Committee Report to the Board b) Board Selects Applicants to be Invited to Interview
April 8	Candidates Notified and Interviews Scheduled
April 13	First Round of Interviews by Staff/Community Interview Team <ul style="list-style-type: none"> a) *Special Board Meeting (Closed) <ul style="list-style-type: none"> i. Board Receives Input re: First Round of Interview Results ii. Board Selects Candidates for Second Round Interviews
April 14	*Special Board Meeting (Closed) <ul style="list-style-type: none"> a) Board Conducts Final Interviews b) Board Determines Top Candidate

TBD	Board Visits Community of Top Candidate if needed
TBD	*Special Board Meeting if needed a) Board Makes Tentative Selection Pending Successful Contract Negotiations
May 16	Regular Board Meeting a) Board Takes Action to Hire Superintendent & Approve Contract
July 1	New Superintendent/Principal Begins Employment

SECTION II

LIST OF QUALIFICATIONS

AND

INFORMATION MATRIX

Working in concert with the Board of Trustees, a list of qualifications is developed. Surveys can be sent to community members, parents and staff to solicit input for developing qualification criteria. Surveys are color coded for easy tabulation purposes. A report is then presented to the Board for review and final determination.

XYZ LETTERHEAD

M E M O R A N D U M

DATE: _____

TO: Parents, Staff and Community Members of the School District

FROM: School District Governing Board Members

SUBJECT: Qualification Survey for New Superintendent/Principal

With the upcoming retirement of _____, _____ School District Superintendent, we are conducting this survey to solicit your input for establishing criteria for hiring a new Superintendent. Please circle the top number of characteristics specified that you feel are important in each of the eight categories listed on the attached survey. Please also add any other characteristics you feel are important, as well as any other categories for consideration. Your input will assist us in our recruitment, screening and selection process.

The online survey can be found at: _____. A hard copy of the survey is available by contacting the El Dorado County Office of Education, 6767 Green Valley Road, Placerville, CA 95667, Attention: Personnel Services Department or calling (530) 295-2326. Please complete the online survey by _____.

We would like to thank you in advance for your participation in this important task.

If you have any questions, please contact _____ at (530) _____ as the County Office of Education will be assisting us in this recruitment process.

Community and staff input is critical as School District searches for a Superintendent/Principal. Please use this survey to identify the characteristics you feel are most important for a new Superintendent/Principal. Thank you for your time and assistance.

FINANCE

1. In the area of FINANCE, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Experience in managing district funds
- Competent business person with good financial and budget skills
- Awareness of grant application process
- Knowledge of California Education finance
- Strong background in alternative funding
- Strong experience with Local Control Funding Formula and Local Control Accountability Plans.

Other comments:

PERSONAL SKILLS

2. In the area of PERSONAL SKILLS, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Good communication skills, including effective listening and speaking skills
- Strength of character, integrity and good interpersonal skills
- People and family oriented, likes children
- Ability to control emotions in difficult situations
- Recognizes parental role of the educational process
- Highest moral, professional, and ethical behavior
- High visibility - attending functions, visiting classrooms, reading to children
- Accessible, approachable and good listener
- Professionalism in public and community activities, with a positive attitude
- Knowledge of community and active in service organizations
- Ability to analyze, assess and demonstrate common sense
- Problem solving ability
- Commitment to education

Other comments:

MANAGEMENT

3. In the area of MANAGEMENT, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Experience in facilities planning and building purchase
- Understanding the maintenance and operations of school environment
- Knowledge of such issues as elections and taxes
- Knowledge of State building process and Office of Local Assistance procedures
- Worked as Superintendent, Assistant Superintendent, Principal or other Administrative position in a unified school district
- Worked as an Administrator in a district that has experienced growth and change including new facilities
- Ability to address issues
- Carries through quickly
- Demonstrates an open door policy to students, parents, staff and community

Other comments:

LEADERSHIP

4. In the area of LEADERSHIP, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Effective organizational skills, long range planning ability
- Ability to work with outside agencies
- Supportive of collaborative management team concept
- Motivates and supports a working environment where employees are comfortable to take risks
- Demonstrates creativity, strong leadership, and management skills
- Has objective view of the community and understands the growth potential of the area

Other comments:

CHARACTER

5. In the area of CHARACTER, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Positive personal characteristics and values
- Possesses a sense of humor
- Accountable for actions
- Trustworthy, honest and loyal
- Open minded to suggestions
- Accepts constructive criticism
- Effective communicator

Other comments:

PERSONNEL

6. In the area of PERSONNEL, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Knowledge of personnel practices
- Supportive of staff
- Seeks staff input and has empathy for staff
- Supportive of professional growth for all staff
- Experience with negotiations

Other comments:

PROFESSIONAL SKILLS

7. In the area of PROFESSIONAL SKILLS, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Background in education field. Prior experience as classroom teacher, site administrator and district office experience working with a school board
- Ability to develop and implement a vision/direction for the District
- Understands the political process of education
- Ability to lead technology planning

Other comments:

EMPLOYER/EMPLOYEE RELATIONS

8. In the area of EMPLOYEE/EMPLOYER RELATIONS, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Experience in contract administration-content and procedures
- Strong negotiation skills
- Evaluation skills

Other comments:

CURRICULUM AND INSTRUCTION

9. In the area of CURRICULUM AND INSTRUCTION, please select the TOP 2 desired characteristics of a Superintendent/Principal.

- Expertise in standards-based instruction
- Aware of educational research and sensitive to reform efforts
- Knowledgeable of characteristics of effective schools
- Wide range of experience and knowledge with children from early childhood through adolescence
- Expertise in curriculum development
- Experience in writing LCAP
- Realistic educational goals and objectives
- Knowledge of instructional aides, special education and consolidated programs
- Knowledgeable in teaching methodologies for a changing student population
- Knowledge of evaluation methodologies and strategies for curriculum, programs and services
- Expertise with State assessment and accountability measures

Other comments:

ADDITIONAL COMMENTS

10. Other comments you would like to share?

11. Please indicate which group you identify with.

**Desired Characteristics
Superintendent/Principal - _____ School District**

I. Finance (Please circle top 2 areas):

1. Experience in managing district funds
2. Competent business person with good financial and budget skills
3. Awareness of grant application process
4. Knowledge of California Education finance - (how the process works)
5. Strong background in alternative funding
- 6.
- 7.

II. Personal Skills (Please circle top 3 areas):

1. Good communication skills, including effective listening and speaking skills
2. Strength of character, integrity and good interpersonal skills
3. People and family oriented, likes children
4. Ability to control emotions in difficult situations
5. Recognizes parental role of the educational process
6. Highest moral, professional, and ethical behavior
7. High visibility- attending functions, visiting classrooms, reading to children
8. Accessible, approachable and good listener
9. Professionalism in public and community activities, with positive mental attitude
10. Knowledge of community and active in service organizations
11. Ability to analyze, assess and demonstrate common sense
12. Problem solving ability
13. Commitment to education
- 14.
- 15.

III. Management (Please circle top 3 areas):

1. Experience in facilities planning and building purchase
2. Understanding the maintenance and operations of school environment
3. Knowledge of such issues as elections and taxes
4. Knowledge of State building process and OFFICE OF LOCAL ASSISTANCE procedures
5. Worked as Superintendent, Assistant Superintendent, Principal or other Administrative position in an elementary school district
6. Worked as an Administrator in a district that has experienced growth and change including new facilities
7. Effective organizational skills, long range planning ability

8. Ability to work with outside agencies
9. Ability to address issues
10. Carries through quickly
11. Supportive of collaborative management team concept
12. Motivates and supports a working environment where employees are comfortable to take risks
13. Demonstrates creativity, strong leadership, and management skills
14. Has objective view of the community and understands the growth potential of the area
15. Demonstrate an open door policy to students, parents, staff and community
- 16.
- 17.

IV. Character (Please circle top 2 areas):

1. Positive personal characteristics and values
2. Possess a sense of humor
3. Accountable for actions
4. Trustworthy, honest and loyal
5. Open minded to suggestions
6. Accepts constructive criticism
7. Effective communicator
- 8.
- 9.

V. Personnel (Please circle top 1 area):

1. Knowledge of personnel practices
2. Supportive of staff
3. Seeks staff input and has empathy for staff
4. Supportive of professional growth for all staff
- 5.
- 6.

VI. Professional Skills (Please circle top 1 area):

1. Background in education field. Prior experience as classroom teacher, site administrator and district office experience working with a school board
2. Ability to develop and implement a vision/direction for the District
3. Understand the political process of education
- 4.
- 5.

VII. Employee/Employer Relations (Please circle top 1 area):

1. Experience in contract administration-content and procedures
2. Strong negotiation skills
3. Evaluation skills
- 4.
- 5.

VIII. Curriculum and Instruction (Please circle top 3 areas):

1. Awareness of middle school concepts and needs of all elementary pupils
2. Aware of educational research and sensitive to reform efforts
3. Knowledgeable of characteristics of effective schools
4. Wide range of experience and knowledge with children from early childhood through adolescence
5. Expertise in curriculum development
6. Realistic educational goals and objectives
7. Knowledge of instructional aides, special education and consolidated programs
8. Knowledgeable in teaching methodologies for a changing student population
9. Knowledge of evaluation methodologies and strategies for curriculum, programs and services
- 10.
- 11.

IX. Other (Please Specify):

- 1.
- 2.
- 3.

SECTION III

SAMPLE

JOB ANNOUNCEMENT

A job announcement is developed by the County Office of Education.

Application Procedure

All documents must be received by _____ at 4:00 pm

Applicants must provide the following:

A completed application available online at www.edjoin.org, or at the El Dorado County Office of Education, Personnel Services Department.

A resume including the following:

- Background Information
- Educational Experiences and Achievements
- Community and Professional Involvement
- Work Experiences

A personal letter of introduction or cover letter giving reasons for being interested in this position.

A minimum of three (3) current letters of recommendation.

Please send all application materials to:

El Dorado County Office of Education
Coleen Johnson, Executive Director
6767 Green Valley Road
Placerville, CA 95667
Phone: 530-295-2219
Fax: 530-621-1395

Please Note: applicants that contact Board of Trustee members will be immediately disqualified from consideration.

Selection Criteria

- Master's Degree
- Valid California Teaching Credential
- California Administrative Credential
- A minimum of five years teaching at the Preschool-8th grade level
- Prior successful administrative experience

Salary

Salary is competitive and negotiable.

Our health benefit package includes medical, dental, and vision coverage.

The contract year is 215 days.



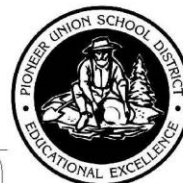
California Distinguished School

2002 Walt Tyler Elementary
2005 Mountain Creek Middle
2008 Pioneer Elementary
2009 Mountain Creek Middle

Please visit our website at :
<http://pioneer-ca.schoolloop.com/>

Announcement for the position of

Superintendent/ Principal



Pioneer Union School District
6862 Mt. Aukum Road
Somerset, CA 95684
530-620-3556

Tradition·Innovation·Excellence

*An Affirmative Action
Equal Opportunity Employer*

The District

The Pioneer Union School District was founded in 1958 through the unification of:

Mountain School, Est 1858
Mt. Aukum School, Est 1860
River School, Est 1878
Fair Play School, Est. 1890
Willow School, Est 1904

The Pioneer Union School District is dedicated to the mission of providing students with an opportunity to academically excel to their capacity, to develop self-confidence and to become contributing members of society.

The mission is best accomplished through the advancement of these core values:

- Foster a respectful, compassionate, cooperative and safe environment
- Nurture the partnership among home, school, and community
- Acknowledge the uniqueness of the individual

Furthermore, part of providing a nurturing educational environment which allows students to eagerly engage in developing their full potential includes the following guiding principles:

- Students will be provided programs, instruction and/or activities to enhance the development of positive attitudes, patience, tolerance, appreciation of different cultures and to be productive members of society.
- Students will be provided programs, instruction, activities and/or guidance to develop mental and moral bravery, caring attitudes toward people and education, to gain a healthy view of competition and to learn age appropriate life skills.

Board & District Desired Outcomes

Provide the best instructional program for students by:

- Maintaining a competitive total compensation package for all staff.
- Providing for on-going, appropriate staff development opportunities.
- Maintaining an effective evaluation program.
- Continue to review and modify district instructional programs to ensure consistency with state standards, accountability requirements and student needs.
- Strive to ensure that any decline in enrollment does not negatively impact the education programs for students.
- Continue implementation of district technology and library plan.
- Continue to implement a maintenance, operations, and site improvement program to ensure facilities are kept at an optimal level.
- Maintain an atmosphere which promotes open communication, trust and understanding with students, staff and the community.

Board of Trustees

John Kahling ~ Chairperson
Bruce Bowers ~ Vice Chairperson
Craig Hall ~ Clerk
Nanette Hargo ~ Trustee
Jody Westfall ~ Trustee

Major Duties and Responsibilities

- Provides instructional and curriculum leadership which includes the development of long and short range plans for the school and the district.
- Establishes and maintains an effective learning climate in the school.
- Conducts a continuous program of supervision and evaluation regarding performance of all certificated and classified staff.
- Coordinates the efforts of teachers, parents, and special team members in working with students to meet individual needs.
- Works cooperatively with employee groups.
- Maintains an open and positive working relationship with parents/guardians and community members.
- Remains current with educational research, trends and developments.
- Administers the budget effectively.
- Manages the maintenance and physical operation of the school.
- Works as an administrative team member to carry out district-wide responsibilities.

SECTION IV

SAMPLE

APPLICATION

A standard application form is available. The form can be modified to meet local needs.

SECTION V
SELECTION PROCESS
AND
COMMITTEE FORMAT

Recruiting and selecting the Initial Interview Committee is an important step in the process of a Superintendent Search. Once again the voter registration data is an excellent way to reach constituents within the district who may have an interest in participating in the interview process. This recruitment would also include staff and parent volunteers who are active in the school district.

A written report is then presented to the Board for selecting the committee representatives.

DATE: _____

TO: Parents and Community Members of the XYZ School District

FROM: XYZ School District Governing Board Members

SUBJECT: Participation on Superintendent/Principal Selection Committee

The XYZ School District will begin the recruitment activities for a new Superintendent/Principal.

The Governing Board will appoint a committee of several community/staff members to assist the Board in the selection process. If you are interested in serving on the committee, please complete the bottom portion of this letter and return it to the XYZ School District by _____.

If you have any questions, please contact _____ at (____) ____-____.

Please return to: _____
XYZ School District
Address
City, State, Zip

_____ Yes, I would like to be considered to serve on the committee to advise the Board in their selection of the new Superintendent/Principal. Please complete the information below.

_____ I would like to nominate the following person to be considered to serve on the committee to advise the Board in the selection of the new Superintendent/Principal.

Name: _____

Address: _____

Phone: Day _____ Evening _____

Occupation: _____

Email: _____

EXAMPLE

(Date)

Name
Address
City, State, Zip

Dear _____

On behalf of the Governing Board of the XYZ School District, I would like to congratulate you on being selected as a Staff Representative on the First Round Selection Committee for the Principal/Superintendent. The Board was very pleased with the applicants and feels confident that the selected team will truly represent interests of the entire XYZ School District staff and community.

We will be conducting an Interview Training Session for all our team members at **(time)** on **(date)** in the XYZ School District Board Room prior to the beginning of the interview process. At that time we will review guidelines regarding appropriate interview practices, decide upon the questions that will be asked of each candidate, and distribute the candidate application packets.

If you have any questions or are unable to participate in this process, please contact me at 530-295-2219. Again, congratulations and I look forward to working with you on **(date)**.

Sincerely,

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

EXAMPLE

(Date)

Name
Address
City, State, Zip

Dear _____:

On behalf of the Governing Board of the XYZ School District, I would like to thank for your interest in being a part of the First Round Selection Committee for the Principal/Superintendent. The Board seriously considered all applicants and feels confident that the selected team will be able to effectively represent interests of the entire XYZ School District staff and community. While other applicants were selected to serve on the interview team, the Board appreciates your interest and willingness to serve.

If you have any questions or concerns, please feel free to contact _____ at (530) _____.

Sincerely,

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

SECTION VI

CONDUCTING

THE

SEARCH

The formal search begins with distribution of application materials. Job announcements and applications may be sent to the following:

- ◆ County Offices of Education Statewide
- ◆ School Districts and School Administrators in Surrounding Districts and Counties
- ◆ Professional Associations and Agencies

The County Office of Education will collect all application packets and are available to answer questions regarding the position.

SECTION VII

CRITERIA

FOR

PAPER SCREENING

A paper screening committee is comprised of an ad hoc committee of the local district. The screening process is facilitated by the EDCOE search advisors.

- ◆ Check List for Specific Requirements - Rating Sheet
- ◆ Conduct Reference Checks, as Needed, to Make Qualification Determination

Name of Applicant	Valid CA Admin Credential?	Educational Background Summary	Application Complete?				Transcripts	Work Experience Summary	Comments	Interview?
			Intro Letter	3 Letters of Reference*	Resume					
Minimum qualifications	Valid CA Admin credential required	Valid California Credential					Demonstrated successful, progressively responsible public school leadership; 4 years K-8 teaching experience 3 years principal or other admin experience;	Receiving Retirement? Golden Handshake? Credential Suspension? Convictions? Dismissals?		

CONFIDENTIAL

SECTION VIII

INITIAL

INTERVIEW PROCESS

Following the paper screening, selected candidates are invited for the initial interview. The selection process and composition of interview committees is reviewed with the Board of Trustees.

- ◆ Letter Greeting Candidates
- ◆ Letter to Unsuccessful Candidates
- ◆ Interview Schedule
- ◆ Interview Questions (Local/Community Issues)
- ◆ Interview Questions (Technical Issues)
- ◆ Forced Ranking Sheet

(Date)

Name
Address
City, State, Zip

Dear _____

I am very pleased to inform you that the Screening Committee has accepted your application for the position of Superintendent of the _____ School District.

The interviews are scheduled for _____, at the El Dorado County Office of Education, 6767 Green Valley Road, Placerville, CA. You have been scheduled for an appointment at _____. We will be contacting you by phone with the results of the first round Committee recommendations.

If you have any questions regarding this process, please feel free to call _____ at (530) _____.

Sincerely,

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

(Date)

Name
Address
City, State, Zip

Dear _____

We appreciate your interest in the position of Superintendent for the _____ School District. The Screening Committee reviewed your application and supporting documents. They appreciated very much your interest in this position, but have chosen not to send your name forward for an interview.

We wish you the best of luck in your future job seeking endeavors. Thank you for your interest in employment with the _____ School District.

Sincerely,

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education



**Superintendent/Principal
XYZ School District**

(Date)

(Time)

Panel:

8:00	9:00	Panel Orientation
9:00	9:45	
9:50	10:35	
10:35	10:45	Break
10:45	11:30	
11:35	12:20	
12:20	12:50	Lunch
12:50	1:35	
1:40	2:25	
2:25	3:30	Panel Debriefing

XYZ SCHOOL DISTRICT SUPERINTENDENT INTERVIEW QUESTIONS

Technical Issues

- _____ Please recap your administrative experience(s) as you feel best support your application. (*Background/Experiences*)
- _____ What do you see as emerging trends in education? (*General*)
- _____ Which of the following three areas -- Curriculum, Budget or Personnel Management -- do you consider your greatest strength? Why? (*Professional Strengths*)
- _____ What do you consider to be the most significant challenge you have faced as an educator; how did you handle this situation? (*Management Style*)
- _____ How familiar are you with the school budgeting process? Describe your experience and training in this area. (*Budget Skills*)
- _____ The district is a rapidly growing district. What issues would be important for you to address as a Superintendent/Principal? (*Facilities Management/Developer Fee knowledge*)
- _____ How would you handle a complaint from a small vocal special interest group? (*Conflict Resolution*)
- _____ Some managers are described as "controllers;" other managers, innovators." Given that most of us have some characteristics of both, which word most closely describes you? Please give an example of how you responded to a situation as a controller/innovator. (*General*)
- _____ If you are selected for this position, how can the County Office and Superintendents in this county help you? (*Knowledge of Resources*)
- _____ Share with us your experiences in technology applications with instruction and administration? (*Knowledge of Technology*)
- _____ What are the important elements to creating a positive work environment? (*Employer/Employee Relations*)
- _____ Share with us an experience where you have successfully assisted an employee in improving their job performance. (*Personnel Practices*)

XYZ SCHOOL DISTRICT SUPERINTENDENT INTERVIEW QUESTIONS

- _____ What do you consider to be the most significant challenge you have faced as an administrator? (*Problem Solving*)
- _____ What strategies as a superintendent would you use to motivate your staff or people in general? (*Feeling About People*)
- _____ In what single skill or ability are you most proficient? How did you develop or cultivate this expertise? (*Self Image/Job History*)
- _____ Share with us your knowledge and information regarding _____ School District and what changes would you envision and what strengths do you see in the district that you would want to maintain?
- _____ What strategies have you found effective in encouraging wider parent and community involvement and communicating with parents and community? If you have a parent that wants to participate, how do you encourage and facilitate that participation? Specifically, what areas of participation would you assist the parent? (*Parent/Community Participation*)
- _____ What role do you see playing in being involved with other government bodies to improve the district? Particularly when considering the growth anticipated in the district?
- _____ Considering your current or last supervisor, what characteristic did you find most objectionable and what characteristic most admirable? Why?
- _____ How do you see programs being designed and resources being allocated to ensure that all children receive a quality education?
- _____ What do you intend to do to raise the academic standards for the district?
- _____ How would you handle a situation where two groups of parents approach you with very different views on what the school should be doing? Particularly considering rural v. urban expectations?
- _____ What process would you employ in developing a budget for the district, and how would you attempt to resolve a conflict in priorities among staff and/or the community?

**XYZ SCHOOL DISTRICT SUPERINTENDENT
INTERVIEW QUESTIONS**

Local/Community Issues

- _____ What prompted your decision to apply for this position? *(Ambitions/Did they research the position?)*
- _____ You have probably known several people who were superintendents. What, in your opinion, are the chief elements of success among them? *(Understands elements of success)*
- _____ What do you consider to be your major responsibilities in your present job? *(Job objectives)*
- _____ What would you like from your next job that you are not currently getting from your present job? *(Job objectives)*
- _____ What do you consider to be the most significant challenge you have faced as an administrator? *(Problem solving)*
- _____ In what single skill or ability are you most proficient? How did you develop or cultivate this expertise? *(Self image/job history)*
- _____ What extracurricular activities have you participated in within your community? *(Educational/Social Patterns)*
- _____ What steps would you recommend to someone who is considering a career as a school administrator? *(Knowledge of job requirements)*
- _____ What strategies as a superintendent would you use to motivate your staff? *(Feeling about people)*
- _____ Who is your personal hero and why? *(Character)*
- _____ What strategies have you found effective in encouraging parent and community involvement? *(Parent/Community Participation)*

RATING SHEET

Position
Date

Directions: After first interview, rank applicant number 1. After second interview, rank that individual as number 1 or 2, adjusting applicant number 1 accordingly. Continue to rank and adjust after each interview. At the end of the interviews you will have ranked all candidates in the order of preference.

Candidates Name	1	2	3	4	5	6	7	8	9	10	11	12

Sample

Candidates Name	1	2	3
Tom Hanks	1	2	3
Joss Whedon		1	2
J.J. Abrams			1

SECTION IX

FINAL

INTERVIEW PROCESS

A presentation is made to the Board regarding the results of the initial interview process. Key strengths of each of the finalists are reviewed. The Board of Trustees, with the assistance of the County Office of Education, develops a list of final interview questions. During the final interview, County Office of Education staff assists the Board of Trustees by:

- ◆ Arranging the Final Interview
- ◆ Handling all Correspondence
- ◆ Scheduling Board of Trustee Visitations to the Home District of the Top Finalist(s)
- ◆ Assisting with Negotiation of the Employment Contract

XYZ SCHOOL DISTRICT

FINAL CANDIDATES

Summary of Comments by Screening Committee Members

1. Patrick Swayze
 - well prepared
 - discussed the culture of the community
 - good training experience

2. Michelle Pfeiffer
 - team building
 - experience as a contractor
 - client centered
 - discussed ability to heal wounds

3. Mel Gibson
 - positive
 - "little things make a big difference"
 - good, specific answers
 - open

4. Meg Ryan
 - experienced
 - strong in budgeting
 - good staff relations

5. Dennis Quaid
 - knowledge of central office
 - knowledge of resources
 - good special education background

XYZ SCHOOL DISTRICT SUPERINTENDENT GOVERNING BOARD INTERVIEW QUESTIONS

- _____ Please describe briefly your background, education and experiences that lead you to apply for this position.
- _____ Specifically, why are you interested in this position?
- _____ What do you see this position giving you that you are not currently receiving from your current job?
- _____ What extracurricular activities have you participated in within your community? How do you see yourself being a part of this community?
- _____ What person or persons have been most influential on you and why? What did you learn from this person or persons?
- _____ Given that to advance and learn we must risk, and that risking also involves some failure, what do you regard as your biggest professional failure - and what did you learn from it?
- _____ What do you regard as your biggest professional success - and what did you learn from it?
- _____ How do you incorporate other peoples' ideas into an action plan, particularly when they bring a different perspective than you have on an issue? Please give an example.
- _____ What options or strategies would you pursue in dealing with personality conflicts between a staff member and a student or two staff members in a district the size of _____? How do you fit together the two roles of peacekeeper and leader?
- _____ How do you see education utilizing technology and what changes do you see ahead for education with technology?
- _____ Describe the advantages and disadvantages that you perceive in considering consolidation of school districts? How do you perceive this issue within El Dorado County within the next five years?
- _____ You have probably known several people who are superintendents. What, in your opinion, are the chief elements of success among them?
- _____ What do you see as the Superintendent's role with respect to the budget process and financial management of the school district?

_____ As Superintendent/Principal of _____ District, you will need to familiarize yourself with the financial information. In reviewing a district financial budget document, what are the key elements you would look for to determine the fiscal position of the district, e.g. are they fiscally healthy? What additional kinds of questions would you need to ask to get a "snapshot" of the district's financial position?

Some answers that should surface:

Is Reserve for economic uncertainty 3% or more?

Do current year expenditures exceed current year income - if so, is this a planned use of one-time money or is there a plan to reduce ongoing deficits?

What is extent of budget reductions made to date? Any future plans for budget reductions?

What has ADA/enrollment growth been like? What is it projected to be like?

What is status of negotiated agreements?

_____ (Abbreviated) What would you propose to use for Phase I planning for a new school?

_____ (Specific) It is obvious that the district is going to experience dramatic growth in the next few years and new schools will be needed. Given the present condition of lack of funding for a state school building program, and knowing that a significant number of developer fees won't be collected for several years, how would you propose the district fund Phase I to prepare for having a school on line when needed?

_____ Describe some of the specific things you would investigate to determine the district's financial state, and justify why you selected those items to review.

Dear _____:

Thank you for your interest in employment as the _____ for the _____ School District. The interview committee very much appreciated meeting with you, but have chosen not to send your name forward for the final interview with the _____ Board of Trustees.

We wish you the best of luck in your future job seeking endeavors.

Sincerely,

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

EXAMPLE

Dear _____:

Congratulations! The _____ Board of Trustees invite you to meet with them for a final interview for the position of Superintendent.

The interview is scheduled for _____ on _____ at the District Office, _____. Please plan for a one hour interview on the above date.

If you have any questions about this final interview process, please call me at () ____-____, Ext. _____. Good Luck on your continuing efforts for the Superintendent position.

Sincerely,

Ed Manansala, Ed.D., Superintendent
El Dorado County Office of Education

SECTION X

SUPERINTENDENT SEARCH

COSTS

Direct Service school districts and other small school districts contracting with the County Office of Education for a Superintendent Search are charged for actual costs for printing, postage, advertisement and data preparation.



Rescue Union School District Superintendent Search Proposal



HYA Executive Search
Hazard, Young, Attea & Associates



February 24, 2017

Ms. Nancy Brownell, Board President
Rescue Union School District
2390 Bass Lake Road
Rescue, CA 95672

Dear Members of the Rescue Union School District Board of Education:

Thank you for the opportunity to present this overview of the services that Hazard, Young, Attea & Associates, (HYA) can provide to the Rescue Union School District (RUSD) in your search for a new Superintendent. Why is HYA exceptional amongst educational search firms? We believe it is due to the following factors:

NATIONAL REACH – LOCAL KNOWLEDGE: We have conducted over 1200 searches and are represented by our network of associates across the country. We have also conducted searches for more than half of the member districts of the Council of Great City Schools and 47 of the 100 largest districts in the country.

THE BOARD PORTAL: Communication and organization are critical to successful searches. Our web-based delivery system gives the Board anytime, anywhere access to all documents regarding the search. Whether through a tablet, smart phone, laptop or desktop computer, the Board and the search Associates have confidential access to all information associated with the search in an organized, transparent, and timely manner.

RESEARCH BASED COMMUNITY ENGAGEMENT: HYA's community engagement process and online survey employ research-based approaches to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The survey was developed based on research on effective leadership.

MORE THAN A BACKGROUND CHECK – EXECUTIVE DUE DILIGENCE: HYA's comprehensive and expanded background checks are completed by independent third-party investigators and include an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read.

The following is our technical proposal. Additionally, the brochure entitled, HYA Signature Search Process, defines a prototypical search, but please know that HYA customizes each search to the District's and Board's specific needs and wishes.

Sincerely,

Dr. Carolyn McKennan, West Coast Regional President
Hazard, Young, Attea & Associates
HYA Executive Search Division of ECRA Group, Inc.

INTRODUCTION

Hazard, Young, Attea and Associates, (HYA) Proposes to conduct a national search for talented and highly qualified candidates for the position of Superintendent of Schools for Rescue Union School District (hereinafter referred to as RUSD).

Information on our firm and the search process are detailed under separate cover titled *HYA Signature Search Process*. This document serves to clearly outline the specific services, deliverables and costs proposed for Rescue Union School District.

SCOPE OF SERVICES

Full descriptions of each phase in our search process are available in our *HYA Signature Search Process* brochure. HYA shall provide the following services and deliverables.



Engage Phase

- Conduct a Planning Meeting with the Board and provide a summary of said meeting which will detail the timeline and steps of the search process and decisions made by the board;
- Survey community constituents electronically and provide a report of findings;
- Provide for up to four individual consultant days for interviews, focus groups, and/or town hall meetings to gather in-person input from constituent groups as decided by the board; additional days are billed at \$1000/day;
- Present a *Leadership Profile Report* to the Board, and propose *Desired Characteristics* based on the data from the survey, interviews with district and community representatives and other material made available to the associates;



Recruit Phase

- Prepare and place advertisements as selected and paid for by the Board;
- Recruit and contact candidates utilizing national networks;
- Correspond with candidates regarding the search process, timeline, *Leadership Profile Report* and *Desired Characteristics*;
- Interview candidates;
- Conduct reference checks;
- Identify best qualified candidates;
- Prepare application materials of selected slate of candidates for Board consideration;



Select Phase

- Present a slate of candidates, the number of candidates to be determined by the Board with a recommendation from HYA;
- Conduct the Interview Workshop and provide materials and protocol to ensure informative effective Board interviews;
- Schedule interviews for the Board with selected semi-finalists and finalists;
- Facilitate Board discussion to narrow candidate pool after each round of interviews;
- Coordinate and provide third party, independent investigative background check(s) of candidates as selected and paid for by the Board;



Transition Phase

- Communicate with all unsuccessful candidates at the close of the search and the appointment of the new Superintendent;
- Hold a debriefing meeting with the new Superintendent and Board regarding information learned throughout the search process;
- Offer other transition services to be considered by the Board and if desired, paid for by the Board.

FEES

In consideration for Services, the District will pay to ECRA/Hazard, Young, Attea and Associates:

- A. Consulting Fee for the search in the amount of \$18,500. This fee is due in three installments
 - 50% will be invoiced upon execution of the contract/agreement
 - 25% will be invoiced upon presentation of the Leadership Profile Report
 - 25% will be invoiced upon presentation of the slate
- B. Based on past experience, HYA has designed advertising packages to maximize exposure for the vacancy. The Board will choose the package that best suits their needs. The cost ranges from \$1950 - \$5000. See Appendix A in the HYA Signature Search Process for additional details.
- C. Background checks/Executive Due Diligence Services as selected by the Board. The cost ranges from \$1105 - \$1950 per candidate. See Appendix B of the HYA Signature Search Process brochure for investigative procedures and options.
- D. Printing and Postage; HYA is a green corporation whereby all documents related to the search will be provided via a Board portal. If the Board wishes to have hard copies, 5% of the Consulting Fee will be added to the agreement as an additional fee to cover the costs associated with printing, binding and shipping all materials.
- E. The Community and Leadership Profile Survey is offered in English and Spanish. If the district wishes to offer the survey in additional languages, the fee is \$315 per language. Please allow up to two weeks for translation.

Reimbursable Expenses

Expenses related to travel of the candidates and consultants will be borne by the Board. HYA directs its associates and candidates to utilize the United States General Service Administration (GSA) guidelines (<http://www.gsa.gov>) for business travel in their given area. Mileage reimbursement is based on current IRS guidelines.

Optional Transition Services

The transition Phase consists of assisting the Board and new Superintendent to assure a successful transition. HYA associates will meet with the new Superintendent and Board leadership regarding the information learned throughout the search process. In particular, the *Community and Leadership Profile Survey Report*. HYA offers additional Transition Services, please see appendix C of *HYA Signature Search Process* brochure for a listing of transition services.

- \$3000 Board Governance Workshop
- \$5000 Board Goal Setting and Superintendent Evaluation
- \$15,000 Comprehensive First Year Support (includes Governance Workshop and Board Goal Setting and Superintendent Evaluation)

Other transition services quoted based on student population.

THE SEARCH TEAM

HYA assigns an individual management team to each executive search that it conducts. Upon the concurrence of the Board, HYA proposes the following search team for RUSD.

HYA Associate	Cell Phone	Email
Diane Siri (lead associate)	831-728-8485	iris1996@aol.com
Jacqueline Horejs	408-778-0766	horejsjacki@gmail.com

Executive oversight for each search is provided by the regional president,
Name: Carolyn McKennan Contact: 831-295-0982; carolynmckennan@ecragroup.com

The Director of Operations, Therese Meyer, serves as project manager and can be reached at 847-318-0072 and theresemeyer@ecragroup.com

GUARANTEES

Fixed Price

Throughout the search process the consultants will be available to counsel with the Board about the search. The consultants will assist the Board until the Board determines it has found the appropriate candidate for the position.

Non-Solicitation of Selected Candidate

The Superintendent appointed with HYA's assistance will not be presented to another Board as a candidate if it would result in the Superintendent leaving the District within five (5) years of employment unless the Board provides written authorization to HYA that they may do so.

Two-Year Window

If the Superintendent departs from the position during the first year under any circumstances or within two (2) years if a majority of the Board is still in place, HYA will conduct a new search for the Board for no additional consulting fee.

Price Match

HYA will agree to match the price of any competitive bid as long as the bid is for a comparable level of services and support (both time and process).

REFERENCES

HYA's reputation for effectiveness and integrity is extremely important. The following references were chosen because the board worked with the HYA consultant(s) being proposed for the search or because the district has a similar demographic profile to the district. The reference contact information includes the Board President of the District. In addition to the references listed below, a list of searches our firm has completed in California is attached.

District Name and State	Reference Name	Contact Information
Campbell Union HSD	Linda Goytia	408.230.7414
Gravenstein Union School District	Jim Horn	707.823.1052
Saratoga Union School District	Arati Nagaraj	408.656.9137
Union Elementary School District	Sheila Billings	408.888.3268
Walnut Creek School District	Katie Peña	925.287.0494

DIANE KRAMER SIRI

EDUCATION

Ed.D	Columbia University	1996
M.A	San Jose State University	1976
B.A.	University of California Los Angeles	1968

PROFESSIONAL EXPERIENCE

2015-Present	Associate, Hazard, Young, Attea & Associate, IL
2006-Present	Education-Project Director and Policy Consultant Project Director-STEMCAP Project Director- CFTL and CAPP Executive Director- ARCHES
1990 - 2006	County Superintendent of Schools Santa Cruz County Office of Education
2006 - 2009	National Baldrige Judge- Secretary of Commerce Appointee National Institute of Science and Technology
1990 - 2002	Adjunct Professor, Education Policy, Santa Clara University
1988 - 1991	Lecturer
1999 - 2006	School of Education, San Jose State University
1984 - 1990	Assistant Superintendent, Educational Services
1983 - 1984	Founding Director, Institute of Computer Technology, Sunnyvale, CA
1975 - 1983	Principal, Watsonville and Renaissance High Schools, Pajaro Valley USD, CA
1969 - 1975	Mathematics Teacher – Pre Algebra to Calculus, Campbell Union High School District & Berryessa Union

AFFILIATIONS AND COMMUNITY PARTICIPATION

Monterey Bay Aquarium, Board Member and Chair Programs and Exhibits 1995-2008; Pacific Collegiate Charter School Founders Award 2006 (US News and WR- Top 5 Schools in US); Superintendent's California P-16 Council, Member 2004-current; Center for the Future of Teaching and Learning, Project Director 2006-present; Founding Co-Director, Alliance for Regional Collaboration to Heighten Educational Success 2006; California Center for Baldrige in Education, Founder and Executive Board, 2001-2006; Monterey Bay Educational Consortium, MBEC, Founding Member and Chair, 1996-2006; SCCELCA, Santa Cruz County Educational Leadership Consortium Acad., Co-Founder, 1995-2000; Chair, State Interagency Committee, California Association of County Superintendents; President, United Way Board of Directors, 1993-1995; Rotary Club of Santa Cruz County, Paul Harris Fellow; President, Association of California School Administrators, Santa Cruz Chapter; Board of Directors, State Fiscal Crisis and Management Assistance (FCMAT), 1996-2002; S.C. Public Schools Foundation Executive Board, 1990-1997; Dominican Hospital Board of Directors Past President, 1993-Present; Cultural Council Executive Board, 1990-1997; Board of Directors, Bay Federal Credit Union, Past President 1997-present; Goodwill Board of Directors, 1991-1993; Co-Chair and Co-Founder, Santa Cruz County Children's Network, 1990-1998; Greater Santa Cruz Community Foundation, Public/Private Leadership Committee; Court Appointed Special Advocates Founding Board of Directors; Phi Delta Kappa, Member, 25 Years Award; Association of California School Administrators Superintendents Symposium 2004, Chair.

JACQUELINE M. HOREJS, ED. D.

EDUCATION

Ed.D.	University of Southern California	1996
M.A.	San Jose State University	1991
B.A.	University of Illinois	1971

PROFESSIONAL EXPERIENCE

2016 –	Associate, Hazard, Young, Attea & Associates
2016 –	Educational Consultant
2006 – 2015	Superintendent, Union School District, CA
2001 – 2006	Assistant Superintendent Educational Services, Gilroy Unified School District, CA
1999 – 2001	Director, Educational Services, Santa Clara County Office of Education, CA
1998 – 1999	Administrator, Standards and Assessment, Santa Clara County Office of Education, CA
1994 – 1998	Principal, Payne Elementary School, Moreland School District, CA
1993 – 1994	Assistant Principal, Rogers Middle School, Moreland School District, CA
1990 – 1993	Assistant Principal, Gilroy High School, Gilroy Unified School District, CA
1986 – 1990	Teacher on Special Assignment, Gilroy High School, CA
1976 – 1986	Teacher, Gilroy High School, CA
1974 – 1976	Teacher, New Fairfield, CT
1973 – 1974	Teacher, Danbury, CT
1971 – 1973	Teacher, Rantoul, IL

CAROLYN MCKENNAN

EDUCATION

Ed.D.	University of Southern California
M.S.	Montana State University, Billings
B.S.	Montana State University, Billings

PROFESSIONAL EXPERIENCE

2013-Present	President, West Coast Region, Hazard, Young, Attea & Associates
2003-2013	Senior Associate, Hazard, Young, Attea & Associates, Ltd. (IL)
2008-2010	Coach, School Administrators, Pivot Learning Partners (Springboard Schools)
2005-2012	Member Services Representative, Association California School Administrators
1996-2005	Superintendent of Schools, Morgan Hill Unified School District (CA)
1990-1996	Superintendent of Schools, Soquel Union Elementary School District (CA)
1989-1990	Assistant Superintendent Instructional Services, San Luis Coastal Unified School District (CA)
1988-1989	Associate Superintendent Administration and Instructional Services Sunnyvale Elementary School District (CA)
1987-1988	Acting Superintendent, Sunnyvale Elementary School District (CA)
1986-1987	Associate Superintendent Curriculum and Instruction, Sunnyvale Elementary School District (CA)
1985-1986	Executive Director Curriculum and Instruction, Billings Public Schools (MT)
1973-1985	Principal, Billings Public Schools (MT)
1967-1972	Teacher, Billings (MT)

CURRENT/PAST CIVIC/PROFESSIONAL ACTIVITIES

Morgan Hill Rotary Club, member, 1996-2005, Paul Harris Fellow
Board of Directors, Cultural Council of Santa Cruz County, 1993-1996
Capitola Chamber of Commerce, member, 1994-1995
Board of Directors, Wharf-to-Wharf Race Committee, 1995-present
Board of Directors, Sunnyvale Chamber of Commerce, 1987-1989
Board of Directors, Leadership Sunnyvale, Vice president, 1987-1989
Committee for Business and Education Together, Sunnyvale, CA, 1987-1989

PROFESSIONAL AFFILIATIONS

President, Superintendents Council, Association of California School Administrators, 2002-2005
President, California City School Superintendents Association, 2000-2001, Secretary 1999-2000
Association of California School Administrators Curriculum Management Audit Committee Governance Council, member, 1997-2003
Chairperson, Mentor New Superintendent's Workshop, Association of California School Administrators, Program, 1993-1994
President, Santa Cruz County Administrative Women in Education, 1992-1994
Vice President, Legislative Action, Santa Cruz Chapter, Association of California School Administrators, 1992-1994
American Association of School Administrators
Association for Supervision and Curriculum Development
Phi Delta Kappa

HONORS

Elected President, Association of California School Administrators Superintendency Council, 2002-2005
CA School Boards Association, Superintendent's Advisory Council, appointed representative, 2003-2005
Association of CA School Administrators, elected representative, Region 8 Superintendency Committee
Association of School Administrators Legislative Policy Committee, 1997-1998
American Association of School Administrators, California Delegate
Northern California Superintendents, 1996-present, by invitation only
Association of CA School Administrators, elected representative, Region 10, Superintendency Committee, 1995-1998
Regional Merit Award, South Bay School Leadership Center California School Leadership Academy, 1993
Senior Level Traineeship, Montana State University, 1967

California Searches Conducted by Hazard, Young, Attea & Associates

School District	Position
Acalanes Union HSD	Superintendent
Alvord USD	Superintendent
Antioch SD	Superintendent
Baldwin Park USD	Superintendent
Bassett USD	Deputy Superintendent
Belmont-Redwood Shores SD	Superintendent
Beverly Hills Schools	Chief Human Resources Officer
Beverly Hills Schools	Executive Director - Special Education
Beverly Hills Schools	Superintendent
Brisbane SD	Superintendent
*Burlingame ESD	Superintendent
Campbell Union HSD	Superintendent
Capistrano USD	Superintendent
Carlsbad USD	Superintendent
Castro Valley USD	Superintendent
Centinela Valley UHSD	Superintendent
Coachella Valley USD	Superintendent
Compton USD	Superintendent
*Cupertino USD	Superintendent
Downey Unified Schools	Superintendent
East Side Union HSD	Superintendent
Eureka SD (Granite Bay)	Superintendent
Fremont Union High School District	Superintendent
Fremont Unified School District	Superintendent
Fresno USD	Superintendent
Galt HSD	Superintendent
Gilroy USD	Superintendent
Gilroy USD	Asst. Superintendent - HR
Gilroy USD	Asst. Superintendent - Ed Services
Gravenstein Union SD	Superintendent/Principal
Hillsborough City School District	Superintendent
Laguna Beach USD	Superintendent
La Mesa Spring Valley SD	Asst. Superintendent - Business Services
Las Lomas ESD	Superintendent
Leadership Public Schools	Chief Executive Officer
Leadership Public Schools	Chief Academic Officer
Loomis USD	Superintendent
Los Altos SD	Superintendent
Los Angeles County High School for the Arts	Principal
Los Angeles County Office of Education	Asst. Superintendent - HR
Los Angeles County Office of Education	Deputy Superintendent
Los Angeles County Office of Education	Asst. Superintendent - HR
Los Angeles Unified School District	Deputy Superintendent - Instruction
Los Angeles Unified School District	Superintendent
Manhattan Beach USD	Superintendent
Mill Valley Schools	Superintendent

California Searches Conducted by Hazard, Young, Attea & Associates

School District	Position
Mountain View	Superintendent
	Deputy Chief, Facilities – Facilities Planning and Management
*Oakland USD	Superintendent
Ocean View School District	Superintendent
Orinda Union SD	Superintendent
Pajaro Valley USD	Deputy Superintendent
*Palo Alto USD	Superintendent
Piedmont USD	Superintendent
Pleasanton USD	Superintendent
Portola Valley SD	Superintendent
Ravenswood City School District	Superintendent
Redwood City Schools	Superintendent
Reed SD	Superintendent
Riverside USD	Superintendent
*Ross SD	Superintendent
*Ross Valley SD	Superintendent
Rowland USD	Superintendent
Saddleback Valley USD	Superintendent
San Carlos	Interim Supt/ Supt
*San Diego City SD	Superintendent
San Diego City, Office of Education	Superintendent
San Francisco USD	Superintendent
San Leandro USD	Superintendent
San Mateo County Office of Education	Asst. Superintendent - Special Ed
San Mateo HSD	Superintendent
San Mateo-Foster City School District	Superintendent
*Santa Ana Schools	Superintendent
*Santa Barbara SD	Superintendent
*Santa Clara County Office of Education	Chief Academic Officer
Santa Monica - Malibu USD	Superintendent
Saratoga ESD	Superintendent
Saugus Union SD	Superintendent
Sausalito Marin City SD	Superintendent
*Sequoia Union HSD	High School Principal
Sequoia Union HSD	Superintendent
Sonoma Valley USD	High School Principal
Soquel Union ESD	Superintendent
South San Francisco USD	Superintendent
Southwestern Community College	President
Stockton USD	Superintendent
Sweetwater Union HSD	Superintendent
Tamalpais UHSD	Asst. Superintendents - Ed Services
Tamalpais UHSD	Asst. Superintendents - HR
Tamalpais UHSD	Superintendent
Tustin USD	Superintendent
Union Elementary School District	Superintendent

California Searches Conducted by Hazard, Young, Attea & Associates

School District	Position
Vallejo City Schools	Superintendent
Vista USD	Superintendent
Walnut Creek SD	Superintendent
West Contra Costa USD	Superintendent
Woodside Elementary SD	Superintendent

** Denotes multiple searches*

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847-318-0072 or at hya@ecragroup.com with questions or requests for additional information.

ECRA Group, Inc.

1475 E. Woodfield Rd., 14th Floor
Schaumburg, IL 60173
(847) 318-0072

East Coast Regional office

Jersey City, NJ

West Coast Regional office

Palo Alto, CA

WWW.ECRAGROUP.COM



HYA Signature Search Process



HYA Executive Search
Hazard, Young, Attea & Associates

The HYA Difference

National Reach – Local Focus

Established in 1987, Hazard, Young, Attea & Associates (HYA) is one of the oldest and largest search firms having assisted more than 1000 school boards select exceptionally talented leadership in school systems across the nation, large and small, urban and rural. HYA's reputation and experience make it one of the preeminent school search firms in the nation and a standard which others often emulate. HYA Associates are located across the country to conveniently serve clients and are thus uniquely qualified to bring local - as well as national - perspectives, knowledge, experience, and connections to each search.

The Board Portal

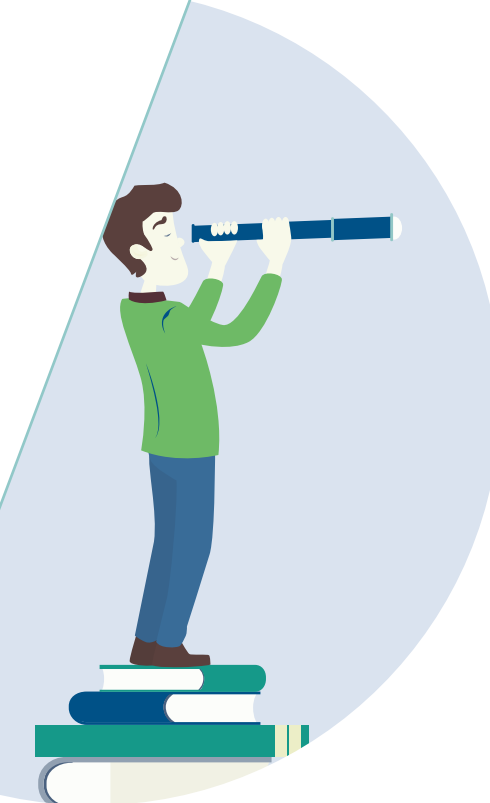
Communication and organization are critical to successful searches. Our web-based delivery system gives the Board anytime, anywhere access to all documents regarding the search. Whether through a tablet, smart phone, laptop or desktop computer, the Board and the search Associates have confidential access to all information associated with the search in an organized, transparent, and timely manner.

Executive Oversight

Every HYA search has executive oversight by a Regional President, and HYA's Director of Operations serves as project manager to ensure all details are carefully managed. HYA has professionally staffed offices, a technological infrastructure, and a staff of full-time employees. Our tech team serves as a resource to school districts for linking the online community survey and other search materials to their website. These resources make HYA capable of responding to Board's requests in a very timely fashion.

Research Based

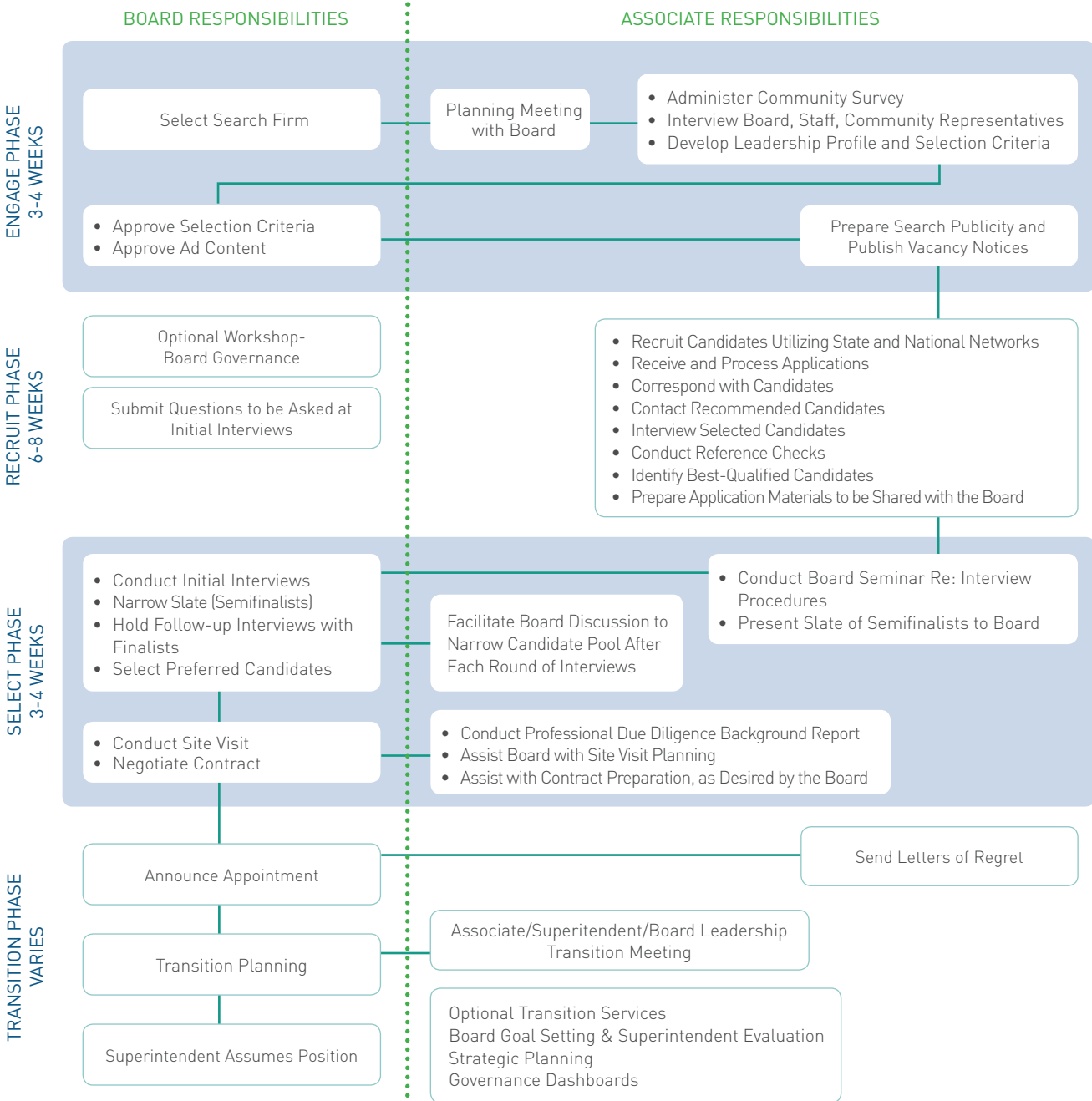
HYA is the leadership division of ECRA group, a premier research and analytics firm with over 35 years of experience supporting school districts in improving student outcomes. HYA's community engagement process and online survey employ research-based approaches to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The survey was developed based on research on effective leadership. The resulting Community and Leadership Profile Survey Report provides information on the current state of the District, essential information the Board will use in the selection process and the new leader can use day one of employment. Furthermore, by blending consulting, professional service, and technology, HYA/ECRA group offers transition services and an analytics infrastructure to help the Board and their new leader better understand the interrelationships among school functions, and the impact of decisions and expenditures on student outcomes.



More Than a Background Check – Executive Due Diligence

HYA’s comprehensive and expanded background checks are completed by independent third-party investigators and include an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read. The investigative procedures are comprehensive and thorough with a focus on the public school landscape - well beyond what constituents could produce through a simple internet search. This includes on-site research of primary source documents at relevant county court houses for civil and criminal record history. Additionally news and social media investigations provide a better understanding of a candidate’s leadership style, public relations skills, and reputation.

HYA Signature Search Process





The Four Phases of HYA's Signature Search

The process outlined represents a prototypical search. Upon selection, the Associates will meet with the Board to discuss this process and modify it to meet the Board's unique needs. The following is a description of each phase in the search:



Engage

The Engage phase consists of designing and planning a process of engaging the Board and stakeholders through interviews, online surveys (available in world languages), and focus groups. Information from these interactions assists the Board in developing a leadership profile and selection criteria that match the priorities of the community and that meet the unique needs of the local district. This disciplined, inclusive and research-based approach ensures all stakeholders have the opportunity to be a part of the search process and provides valuable feedback about the school district based on HYA's local research and professional understanding of the district's standing in the broader marketplace. In an effort to be fully transparent to the community, an internet link is provided to the HYA website which details the search process and the vacancy announcement.





Recruit

The Recruit phase consists of leveraging HYA's extensive national network of Associates across multiple offices and incorporating advertising strategies (as selected and paid for by the Board pursuant to Appendix A) that results in the identification and recruitment of exceptionally talented leaders. HYA can also recruit non-traditional candidates, i.e. executives that have worked in business, military, private or public sector. HYA works in close partnership with state and national organizations with numerous Associates serving on those Boards.



Select

The Select phase consists of providing the Board with a slate of candidates that were interviewed by HYA Associates using the Leadership Profile established by the Board. HYA Associates are committed to spending the necessary time and energy on the details to find the right candidates to bring to the Board. The search team then facilitates the Board interviews and appointment process including reviewing candidates' references. HYA's ability to gain important background information regarding candidates - beyond what appears on an individual's resume - is a unique and distinguishing characteristic of HYA, and is attributable to the integrity of the firm, Associates, and the vast networks of professional relationships built through years in the education field. A workshop on interviewing and construction of interview questions is facilitated by the Associates for the Board. Executive due diligence including formal background and media checks complete the Select phase (as selected and paid for by the Board pursuant to Appendix B).



Transition

The Transition phase consists of assisting the Board and new Superintendent to assure a successful transition. Appointing a new leader is the first step toward accomplishing organizational and student goals for success. Included in the search fee is a transition meeting with the new Superintendent and representative(s) of the Board regarding the information learned throughout the search process, in particular, the Community and Leadership Profile Survey. Additional transition services are available (as selected and paid for by the Board pursuant to Appendix C).

The Search Team

Presently, HYA is represented by Associates across the United States who assist with the firm's mission to provide proactive, thorough and quality assistance to School Boards in need of identifying and recruiting highly qualified executives for superintendencies and other administrative positions. HYA Associates bring extensive executive search experience and broad educational backgrounds to its practice. Through continuing involvement in school and university work, HYA Associates are aware of current educational issues and have strong relationships with educational leaders and opinion-makers in administrative leadership and management. HYA is committed to engaging a diverse and gender balanced cadre of Associates. Among HYA Associates are members of NABSE (National Alliance of Black School Educators) and ALAS (Association of Latino Administrators and Supervisors).

HYA assigns an individual management team to each executive search that it conducts. Associates assume direct responsibility for the search and coordinate the activities of all individuals engaged in the project. In addition to the Associates assigned to the search, all nation-wide Associates in the firm are tasked with identifying prospective candidates. Board members will receive the business, home and cell phone numbers, as well as the email addresses of the Associates.

HYA has professionally staffed offices, a technological infrastructure and a full-time employed staff; thus, HYA is capable to respond to any request the Board may have on the Board's time schedule. Finally, each search has executive oversight by a Regional President and HYA's Director of Operations serves as project manager to ensure no detail is overlooked. HYA's office staff, which is highly knowledgeable and pleased to assist at any time, is available to the Board from 9:00 a.m. to 5:00 p.m. CST, Monday through Friday.

HYA believes that communication and organization are critical to successful searches. Our delivery system gives the Board anytime, anywhere access to all documents regarding the search. HYA has adopted a green process whereby all materials are delivered via a dedicated search portal so the Board and its Associates can have confidential access to all information associated with the search in an organized and timely manner.

All materials are delivered via a dedicated search portal giving the Board immediate and organized access to all information

Appendices

- A Advertising Services
- B Executive Due Diligence
- C Transition Services

Advertising Services

HYA Associates work with their clients to consider the many approaches to advertising vacant position(s). The HYA staff creates and coordinates all advertisements at the Board's direction. The National Plan ensures exposure in the most frequently read print, e-publication journals, and job boards of educational leaders across the country. HYA has created other more focused advertisement options for the Board to consider as add-ons to the National Plan, including state and region-specific options. Whatever the Board chooses, HYA staff will write, place, and coordinate all the details.

Package 1

HYA group print ad in Ed Week

Online listing on EdWeek's TopSchoolJobs site for 30 days

Online Showcased ad on EdWeek and TopSchoolJobs homepages for 7 days

Online listing on AASA's site for 30 days

Posted on ECRA, Twitter, and LinkedIn

Package 2

Two HYA group print ads in Ed Week

Online listing on EdWeek's TopSchoolJobs site for length of search

Online Showcased ad on EdWeek and TopSchoolJobs homepages for 7 days

Online listing on AASA's site for 30 days

Online Spotlight and Preferred upgrades on AASA's Site for 30 days

Posted on ECRA, Twitter, and LinkedIn

Package 3

Monthly HYA group print ad in Ed Week for length of search

Dedicated District specific print ad in Ed Week

Online listing on EdWeek's TopSchoolJobs site for length of search

Online Showcased ad on EdWeek and TopSchoolJobs homepages for 7 days

Online listing on AASA's site for 30 days

Online Spotlight, Preferred, and Featured upgrades on AASA's Site for 30 days

Posted on ECRA, Twitter, and LinkedIn



Options to Complement the Advertising Packages

(Choose as many as desired.)

Careerbuilder Network	ALAS & NABSE	LinkedIn
<p>Careerbuilder ad, linked to ASCD job ramp (Association for Supervision and Curriculum Development) for 30 days</p>	<p>Association of Latino Administrators and Superintendents (ALAS) for 6 weeks online, push on ALAS apps</p> <hr/> <p>National Association of Black School Educators (NABSE) for 30 days</p>	<p>LinkedIn listing for 30 days</p>

Regional Packages

(Choose one of the following.)

California	Northeast	State Specific
<p>2 advertisements (5X4) in EdCal/ACSA (Association of CA School Administrators), print and e-publication</p> <hr/> <p>CALSA (CA Association of Latino Superintendents and Administrators) online advertisement for 90 days</p> <hr/> <p>CAAASA (CA Association of African American Superintendents and Administrators) online advertisement</p> <hr/> <p>Posted on ECRA, Twitter, and LinkedIn</p>	<p>NJASA (New Jersey Association of School Administrators)</p> <hr/> <p>NYSCOSS (New York State Council of School Superintendent) online and newsletter</p> <hr/> <p>CAPSS (Connecticut Association of Public School Superintendents)</p> <hr/> <p>Posted on ECRA, Twitter, and LinkedIn</p>	<p>Three state association advertisements as decided by the associate and the board</p> <hr/> <p>Posted on ECRA, Twitter, and LinkedIn</p>

Executive Due Diligence

HYA incorporates executive due diligence in the search process. The comprehensive and expanded background checks are completed by independent third-party investigators and include an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read. The investigative procedures are comprehensive and thorough with a focus on the public school landscape - well beyond what constituents will produce through a simple internet search. This includes on-site research of primary source documents at relevant county court houses for criminal record history. Each background search requires 7-10 working days to complete.

Two packages are offered. The Comprehensive Package includes a news and social media analysis. The news media investigation provides a better understanding of a candidate's leadership style, public relations skills and priorities. The news media investigation draws upon over 28,000 specialized publications and 900 newswires in 200 countries and includes 30 years of credible archived information. Special focus is given to publications in communities where the candidate has lived or worked. The social media review includes a review of text and images on sites such as Twitter, LinkedIn, personal blogs and industry websites. The analysis provides a summary of candidate generated activity with highlights of negative alerts.

The Basic package was designed in response to requests for a simpler cabinet or principal position background check; it does not include the news and social media analysis.

	Comprehensive	Basic
Personal Profile Summary	x	x
Social Security Trace	x	x
County Criminal Record History	x	x
Federal Criminal Record History	x	x
County Civil Record History	x	x
Department of Motor Vehicles License Information	x	x
Education (Degree) Verification	x	x
Transunion Credit Report	x	x
Investigation of all Aliases Identified within Past 7 Years	x	x
Investigation of all Jurisdictions of Residence, Education, and Employment within Past 7 Years	x	x
University and Academic Program Accreditation	x	x
National Criminal Record History	x	x
National Sex Offender Search	x	x
Executive Summary	x	x
News Media Review (5 year timeframe and up to 20 relevant articles)	x	
Social Media Review	x	

Transition Services

HYA offers optional transition services that would benefit Boards and new Superintendents during the transition period and the Superintendent's first year in the school district.

Board Governance Workshop

The Board Governance Workshop requires 3-4 hours and provides the Board the opportunity to clarify the respective roles of the Board and the Superintendent. The workshop addresses the concepts of trusteeship, governance, management, continuous improvement and systematic change. Developing and maintaining effective Board-Superintendent relations, the need for long and short range planning, consensus decision-making, and other components of successful Board service are also discussed at this workshop.

Board Goal Setting & Superintendent Evaluation

To develop and maintain effective Board-Superintendent relations and provide the Board with an opportunity to determine what it desires to have the Superintendent achieve during his/her first two years in the position, goals and the evaluation process must be codified and understood with great clarity. The evaluation process should reinforce the concept of continuous improvement, and should monitor the achievement of the Board's goals. Processes and instruments for performance evaluation will be developed in collaboration with the Board and new Superintendent. The Board and Superintendent can choose to adopt HYA's research-based 360-degree Superintendent evaluation process. This service requires 6-8 hours over two days.

Comprehensive First Year Support

This service includes both the Board Governance Workshop and the Board Goal Setting & Superintendent Evaluation service in addition to ongoing mentoring for the new Superintendent. The mentoring relationship will be designed with the HYA Associate and the new Superintendent with input from the Board. There is a focus on monitoring progress towards attainment of Board goals and facilitation of the Superintendent's first year evaluation.

Strategic Planning

Improving student outcomes begins with a clear and compelling vision for student success. When a new leader is appointed, a clear and concise strategic plan helps guide decisions and ensures energy is directed toward advancing the priorities of the community as directed by the Board. A disciplined strategic planning process allows school systems to engage stakeholders, build a consensus around what matters, and channel resources accordingly in order to ensure a maximum return on investments. A disciplined strategic planning process provides clarity of purpose as well as a structure to align the organization, its structures, and its policies. This service is typically a 3-6 month engagement.

Governance Dashboards

Governance dashboards help to facilitate, launch, and govern implementation of the district's strategic plan and give meaningful data for the Board to evaluate the impact and return on investment that strategic goals are having on student achievement, financial, and other system outcomes. The strategic dashboard provides a framework for the Board and Superintendent to communicate the priorities and progress of the school system to the community. This service is a continued service from year to year.

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847-318-0072 or at hya@ecragroup.com with questions or requests for additional information.

ECRA Group, Inc.

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Schaumburg, IL 60173
(847) 318-0072

East Coast Regional office

Jersey City, NJ

West Coast Regional office

Palo Alto, CA

WWW.ECRAGROUP.COM



**PROPOSAL TO CONDUCT A
SUPERINTENDENT SEARCH
FOR**



RESCUE UNION SCHOOL DISTRICT

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

805.364.2775

www.leadershipassociates.org



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3905 STATE STREET, #7-407
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KENT L. BECHLER + JAMES R. (JIM) BROWN + MARC ECKER + MICHAEL F. ESCALANTE + RICHARD FISCHER + SALLY FRAZIER + DON IGLESIAS + PEGGY LYNCH + PHIL QUON + DENNIS M. SMITH + RICH THOME + SANDY THORSTENSON + DAVID J. VERDUGO

PROPOSAL TO CONDUCT AN EXECUTIVE SEARCH

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. We have completed more than 350 searches for California school boards since that time. More than 85% of the superintendents selected have remained in their positions 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. Through the continued participation of several of our partners in education organizations such as the California Collaborative for District Reform, 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 your School District. It is our job and our commitment to you to find those individuals who are that right match.

In making recommendations to you about candidates, we consider the uniqueness of the district and do all we can to respect and become fully aware of the accomplishments and priorities.

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 your consideration.



If our firm is selected, you will be assigned a member or a team of consultants that are highly qualified to partner with you. Our consultants are experts in their field and all have been highly successful former superintendents. 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 your district.

Respectfully,

A handwritten signature in blue ink that reads 'Dennis Smith'.

Dennis Smith, Ed.D
Lead Partner, Leadership Associates



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. We provide this outline to give you an overview, but also for your reference so you know what we are doing on your behalf throughout the search and particularly in the periods of time between our meetings with you.

Our meetings with you are *italicized and marked with an asterisk*.

Phase 1 - **Initial Meeting with the Board*

Leadership Associates will meet with the Board once we have been selected to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services. These will certainly include 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; the final 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 also meet with Board members individually, in person or by phone to learn each member's unique perspective.

Phase 2 - Community and Staff Input

After working with the Board and staff to develop a student, staff, and community engagement plan, we meet with the individuals and groups per your request (Community, staff, students). We share the search process, timeline, answer questions and then solicit input regarding the desired qualities, characteristics, background and experiences of the new superintendent, as well as 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, 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 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

The Position Description is prepared reflecting the input we receive 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 then posted on our website and distributed widely and can be posted on the District's website.

Phase 4 - Advertising, Recruitment, Reference Checking

After our meetings 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

At this 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 that will include a tiered ranking of candidates for your review. The Board, however, makes the final decision on those to be interviewed and determines the interview schedule and location. We offer sample interview questions and assist the Board in finalizing them. 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

The Board conducts the interviews 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 also assist with various follow up steps that need to be completed and inform all candidates of the outcome.

Phase 7 - Visit to the Finalist's District and Contract

The purpose of the visit is to validate the Board's choice prior to the official contract offer. The Board will determine who will go on the visit; the consultants will not participate in the visit. We 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 the New Superintendent

Following the validation visit, 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.

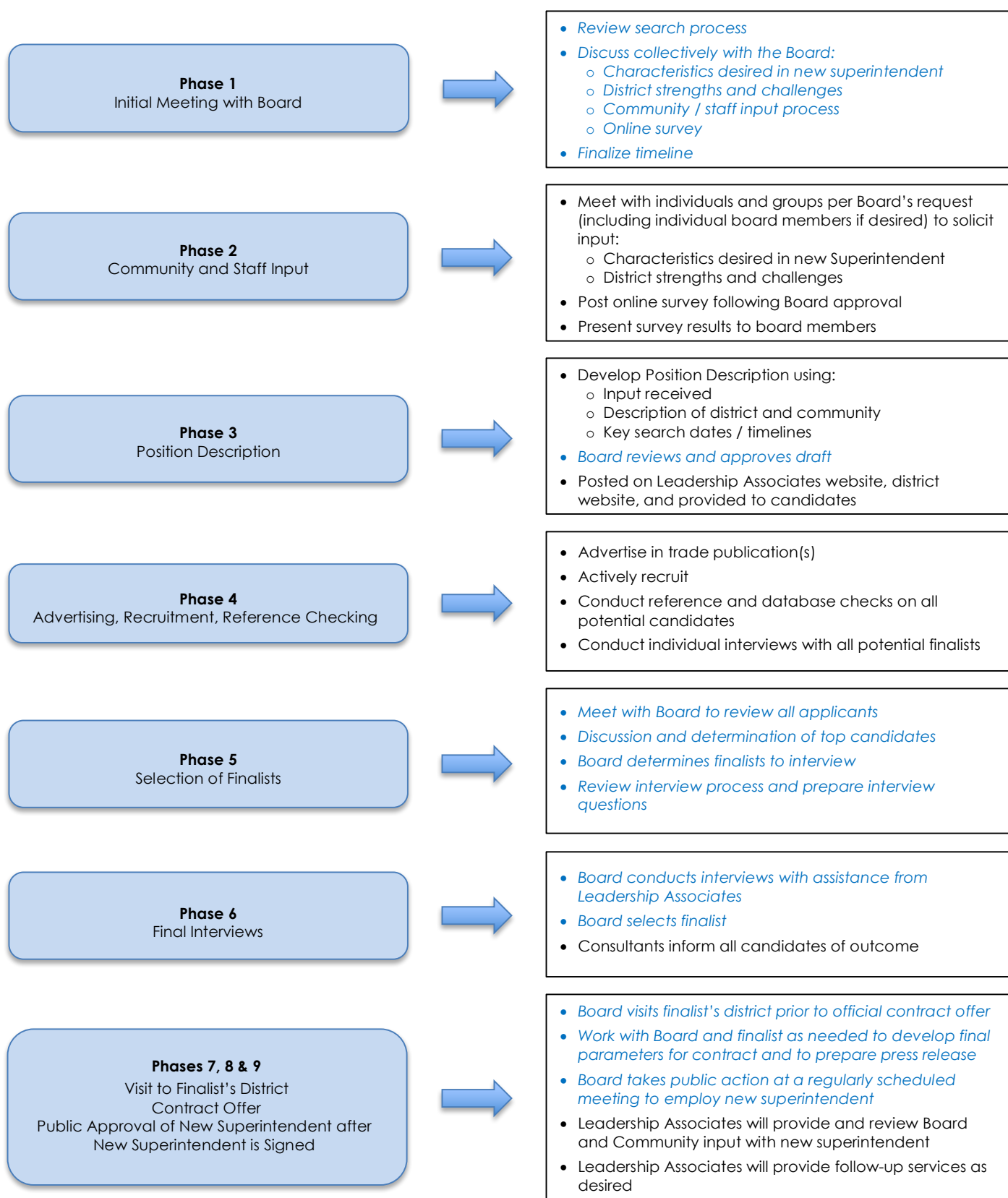
Phase 9 - After the New Superintendent is Signed

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



Note: *Blue italicized text* indicates Board Participation

SUGGESTED TIMELINE

Timeline is flexible based on Board direction

MONTH/PHASES	DATES (TBD)	EVENT
CURRENT MONTH		Superintendent receives proposal
		Board Reviews Proposals/Selects Firm
MONTH 1 (Phases 1-4)		<i>Board meets with consultants and determines characteristics, skills & qualities desired in a new superintendent, and establishes timeline and procedures for superintendent selection</i>
		Consultants meet with staff and community designated by Board to receive input
		Consultants begin identifying candidates; Development and posting of recruitment materials and Position Description
		Advertising and active recruitment Ad appears in AASA and EdCal
MONTH 2 (Phase 5)		Deadline for applications
		Consultants complete comprehensive reference and background checks on applicants
		<i>Board meets with consultants, reviews all applications and selects finalists to be interviewed</i>
MONTH 3 (Phases 6-8)		<i>Board interviews finalists</i>
		<i>Board visits community of leading candidate. Board offers contract</i>
		<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
FINAL (Phase 9)		New superintendent begins

Note: *Blue italicized text* indicates Board Participation



QUALIFICATION STATEMENT

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 350 searches in California since 1996. We have 13 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 Dialogue; Association of California School Administrators (ACSA), California Association of Latino School Administrators (CALSA); 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 the California state superintendent's committee for ACSA; two were presidents of ACSA
- 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*

EXPERIENCE AND QUALIFICATIONS OF PERSONNEL

CONSULTANTS / BIOS

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

Kent served as superintendent of the Corona-Norco Unified School District, the 9th 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).

James R. (Jim) Brown – Partner, Senior Advisor

James R. (Jim) Brown served as Superintendent of Schools for the Glendale, Palo Alto and Lompoc Unified School Districts. He was also Superintendent of the Cambria Union Elementary and Coast Union High School Districts. Jim received his Master's Degree from the University of Kansas and his B.S.F.S. Degree from Georgetown University, Washington, D.C. He chaired the ACSA Superintendents Committee and the ACSA Urban Superintendents Committee. He also served as co-chair of the California State Mathematics Task Force and the High School Exit Exam Panel. He was a member of the It's Elementary Task Force. He was President of the National Suburban School Superintendents' Association and Schools for Sound Finance. Jim has experience conducting executive searches since 2004, and has facilitated or assisted in the facilitation of more than 55 executive searches since that time. Jim served as senior advisor for Pivot Learning Partners. His areas of focus were: Teacher and Principal Effectiveness, Governance, the Strategic School Funding for Results Project, Executive Coaching, and documentation of education innovations. Jim has been a member of the Board of Directors of Glendale Memorial Hospital, the American Leadership Forum and the Southern California Leadership Network. He has served in leadership roles in numerous community and civic groups.

Marc A. Ecker, Ph.D – Partner

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 Association of Middle Level Education. He is a full time faculty member at California State University, Fullerton in the position of Distinguished Professor in the College of Education. He directs 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.

Michael Escalante, Ed.D – Partner

Mike served as Superintendent of the Glendale Unified School District in Los Angeles County and the Fullerton Joint High School District in North Orange County for a total of 13 years, 6 ½ in each district. He earned his Bachelor's Degree from San Diego State University, Master's Degree in Education from Loyola Marymount University and Doctorate in Educational Leadership from the University of Southern California. Mike serves as a doctoral level instructor at the University of Southern California Rossier School of Education. He teaches educational leadership and has responsibility for chairing doctoral dissertations. Mike's academic interest is in the area of building effective board superintendent relationships. During his 38 year career in public education, he served in professional organizations including Association of California School Administrators (ACSA), The USC Dean/Superintendent Advisory Committee Southern (DSAC), Southern California Superintendents, Urban Superintendent Dialogue, Educational



Research Development Institute (ERDI), California Latino Superintendents' and Administrators' Association (CALSA), Association of Latino Administrators and Superintendents (ALAS).

Richard Fischer – Associate

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. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

Sally Frazier, Ed.D – Partner

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.

Don Iglesias – Partner

Don served as Superintendent of San José Unified School District, the South Bay's largest school district with more than 32,000 students K-12. The district is culturally diverse with students speaking 85 languages and more than one-third designated as low income. Don was the State President of the Association of California School Administrators (ACSA), representing over 16,000 members statewide. He received his Bachelor's Degree from the University of California, Berkeley and his Master's Degree in Multicultural Education from the University of Southern California. During his tenure as Superintendent, San José Unified was recognized by the Editorial Projects in Washington D.C. for having the second highest graduation rate in the nation for urban school districts among the nation's 50 largest cities. Graduation rate for seniors was 93%. Don served as the Chair of the Silicon Valley Chamber of Commerce Education Committee and as the Conference Chair for the California Superintendents' Symposium. He was also President of the California City Superintendents' organization. San José Magazine recognized Don as a member of the Power 100, the most influential people in the Silicon Valley and the Bay Area.

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 30 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.*

Phil Quon – Partner, Chief Financial Officer

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

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (25,000 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 20 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 served as Superintendent of Schools for South Bay Union School District and Cardiff Elementary School District. He has conducted more than 65 executive searches and more than 104 Board workshops or Superintendent Evaluations with School Boards. He also serves as part-time as Director of Partnerships for the Institute for Entrepreneurship in Education (IEE), a professional development and research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. 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 California State University, Los Angeles, and his Master's Degree from Pepperdine University. He is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich has been honored with the Honorary Service Award from the California Congress of Parents, Teachers and Students; The Orange County Hispanic Educator of the Year Award; and the Apple Distinguished Educator Award. Rich gained state-wide distinction while serving as Chairperson of the Superintendents' Technology Advisory Committee and leading the



expansion of technology centers and efforts of school districts throughout the region as the Assistant Superintendent of Technology and Human Resources for the County of San Diego.

Sandy Sanchez Thorstenson – Associate

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, serves on the board of directors of the Soroptimist International of Whittier and is an associate partner with Leadership Associates.

David J. Verdugo, Ed.D – Associate

David served as Superintendent of Schools for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as the Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA) and has held positions of Assistant Superintendent, Director of Secondary Education, Principal at both Elementary and High School levels as well as teacher and coach. David has served a total of 43 years in the field of education spanning Grades K-12. During his 43 years in the field of education, 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 servicing students of diverse populations and socioeconomic levels in urban and suburban settings. He was named ACSA's 2008 Region 14 Superintendent of the Year, and received the California State University Long Beach Outstanding Superintendent Leadership Award in 2012 and the ALAS, Association of Latino Administrators and Superintendents, National Outstanding Educator Award in 2013. 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. Currently he is the Executive Director of the California Association of Latino Superintendents as well as the former Superintendents Leadership Academy Director for the Association of Latino Administrators and Superintendents based in Washington, D.C.



PRICE PROPOSAL

TOTAL FEE TO CONDUCT SEARCH FOR NEW SUPERINTENDENT – All Inclusive: \$22,500

This fee includes:

- All expenses incurred by consultants
- All meetings with the Board
- Development and posting of the position description announcing the position
- Cost of advertising in EdCal
- 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:
 - scheduling appointments
 - notification of unsuccessful candidates
 - scheduling community visit
- Assisting in the development of interview questions
- Assisting the Board's administrative assistant throughout the process with templates, 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 visit, if conducted
- Guarantee that should the new superintendent leave within one year, Leadership Associates will conduct a new search with no consultant fee, costs for travel and advertising expenses only, 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 _____, **2017** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **RESCUE UNION 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 search proposal.

The District agrees to pay the Contractor **TWENTY-TWO THOUSAND FIVE HUNDRED DOLLARS (\$22,500)** for services provided. Payment is to take place in two increments: **(1) \$11,250** upon completion of stakeholder input, and **(2) \$11,250** 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.

The Contractor is to perform the above services beginning _____, 2017.

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#: 68-038 3653

DISTRICT:
RESCUE UNION SCHOOL DISTRICT

By _____

By _____

Name Dennis Smith, Ed.D (or designee)

Name _____

Date _____

Date _____



BOARD RECOMMENDATIONS

The following are excerpts from letters of recommendation written by boards that selected Leadership Associates as their search consultant.

Whittier City School District

"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."

Fullerton School District

"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."

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."

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."

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."

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."

Palo Alto Unified School District

"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."

Carmel Unified School District

"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."

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."



LEADERSHIP ASSOCIATES SEARCHES, 2013 - 2017

STATEWIDE

Association of California School Administrators (ACSA)	Executive Director
California Collaborative for Educational Excellence (CCEE)	Executive Director
WestEd/GATES	Executive Director

COUNTY OFFICE OF EDUCATION/SUPERINTENDENT

Los Angeles County – 2011	1,500,000+ ADA
Santa Clara County – 2008	275,000+ ADA

SUPERINTENDENT (2013-2016)

<u>District</u>	<u>County</u>	<u>ADA</u>
San Francisco USD	San Francisco	58,865
Santa Ana USD	Orange	57,410
Capistrano Unified	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
Fontana USD	San Bernardino	40,374
San Jose USD	Santa Clara	32,938
Anaheim Union HSD	Orange	32,085
Mt. Diablo USD	Contra Costa	31,923
San Ramon Valley USD	Contra Costa	31,900
West Contra Costa USD	Contra Costa	30,596
Bakersfield City SD	Kern	30,262
Rialto USD	San Bernardino	26,468
Placentia-Yorba Linda	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
Anaheim City SD	Orange	19,312
Antioch USD	Contra Costa	18,352
Ventura USD	Ventura	17,430
Santa Rosa City Schools	Sonoma	16,700
Oxnard School District	Ventura	16,533
Burbank USD	Los Angeles	16,207
Cajon Valley Union SD	San Diego	16,059



Proposal for Executive Search
East Whittier City School District
Superintendent Search, 2017

Paramount USD	Los Angeles	15,681
Walnut Valley USD	Los Angeles	14,658
West Covina USD	Los Angeles	14,402
Fullerton School District	Orange	13,661
Vacaville	Solano	12,561
San Dieguito Union HSD	San Diego	12,485
Palo Alto USD	Santa Clara	12,357
Natomas USD	Sacramento	12,300
Metropolitan Education	San Jose	12,000
Oak Grove Elementary	Santa Clara	11,800
Victor ESD	San Bernardino	11,531
Franklin-McKinley SD	Santa Clara	11,269
Santa Monica-Malibu USD	Los Angeles	11,249
Lucia Mar USD	San Luis Obispo	10,710
Pittsburg USD	Contra Costa	10,560
Azusa	Los Angeles	10,518
Dublin USD	Alameda	10,000
Roseville City ESD	Placer	9,943
Yucaipa-Calimesa Joint USD	San Bernardino	9,655
Ocean View SD	Orange	9,461
Davis Jt. USD	Yolo	8,626
San Mateo Union HSD	San Mateo	8,163
Novato USD	Marin	8,078
South Bay Union ESD	San Diego	7,682
Santa Maria JUHSD	Santa Barbara	7,633
Santa Cruz City Schools	Santa Cruz	7,092
Newhall SD	Santa Clara	6,831
Santee School District	San Diego	6,695
Fountain Valley USD	Orange	6,337
Newark USD	Alameda	6,294
Ukiah	Mendocino	6,214
Brea Olinda USD	Orange	5,973
Alta Loma SD	San Bernardino	5,900
Orcutt Union ESD	Santa Barbara	5,087
La Habra City School District	Orange	6,013
Oakley Union SD	Contra Costa	4,871
Moreland SD	Santa Clara	4,670
San Lorenzo Valley USD	Santa Cruz	4,444
Ravenswood City SD	San Mateo	4,296
Paradise USD	Butte	4,261
Duarte USD	Los Angeles	4,247
Lindsay	Tulare	4,150
Central Union HSD	Imperial	4,104



Proposal for Executive Search
East Whittier City School District
Superintendent Search, 2017

Cypress School District	Orange	4,000
Eureka City	Humboldt	3,884
Amador County USD	Amador	3,829
Mountain View-Los Altos UHSD	Santa Clara	3,753
Goleta Union	Santa Barbara	3,718
Del Norte County USD	Del Norte	3,591
Cabrillo USD	San Mateo	3,357
Cambrian School District	Santa Clara	3,349
San Marino USD	Los Angeles	3,146
Exeter Public	Tulare	3,000
Standard ESD	Kern	2,979
San Bruno Park SD	San Mateo	2,785
Castaic Union SD	Los Angeles	2,568
Scotts Valley USD	Santa Cruz	2,482
Jefferson SD	San Joaquin	2,477
Carmel USD	Monterey	2,468
Bear Valley USD	San Bernardino	2,453
Galt JUHSD	Sacramento	2,287
Lammersville USD	San Joaquin	2,200
Red Bluff Union ESD	Tehama	2,178
Plumas USD	Plumas	2,130
Ft. Bragg USD	Mendocino	1,917
Willits USD	Mendocino	1,907
Byron Union SD	Contra Costa	1,686
Reed Union SD	Marin	1,556
Larkspur-Corte Madera	Marin	1,550
Las Lomitas Elementary	San Mateo	1,336
St. Helena USD	Napa	1,295
Kentfield School District	Marin	1,177
Taft UHSD	Kern	1,045
University Preparatory School	Shasta	900
Rancho Santa Fe SD	San Diego	700
Kings River Union Elementary	Tulare	476
Alview-Dairyland Union SD	Madera	367

EXECUTIVE DIRECTOR/DIRECTOR

Baldy View ROP	San Bernardino
Oxford Preparatory Academy	Orange
San Ramon Valley SELPA	Contra Costa
So Orange County SELPA	Orange
West End SELPA	San Bernardino
West San Gabriel Valley SELPA	Los Angeles



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSES: [CLOSING DATE]**

Introduction

The [insert] School District Board of Education is asking for your help in selecting the next superintendent of schools. 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 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.



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSES: [CLOSING DATE]**

DISTRICT STRENGTHS & CHALLENGES; COMMUNITY

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

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

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

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



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSSES: [CLOSING DATE]**

DESIRED PROFESSIONAL EXPERIENCE

5. Please rank, in order of importance (1 being 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.

⋮	<input type="text"/> <input type="text"/>	Experience in California public education, either teaching and/or site administration
⋮	<input type="text"/> <input type="text"/>	Experience as an assistant superintendent or associate superintendent
⋮	<input type="text"/> <input type="text"/>	Leadership experience in a comparable district
⋮	<input type="text"/> <input type="text"/>	Experience in oversight of school district finances, budgets, and business management
⋮	<input type="text"/> <input type="text"/>	Experience in management of school facilities
⋮	<input type="text"/> <input type="text"/>	A proven track record of growing academic achievement for all students, including special needs children, second language learners, and children of poverty
⋮	<input type="text"/> <input type="text"/>	Bilingual



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSSES: [CLOSING DATE]**

DESIRED PROFESSIONAL LEADERSHIP CHARACTERISTICS

6. Please rank, in order of importance (1 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.

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



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSES: [CLOSING DATE]**

DESIRED PERSONAL CHARACTERISTICS

7. Please rank, in order of importance (1 being 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.

<input type="checkbox"/>	<input type="text"/>	Decisive
<input type="checkbox"/>	<input type="text"/>	Organized
<input type="checkbox"/>	<input type="text"/>	Approachable
<input type="checkbox"/>	<input type="text"/>	Democratic
<input type="checkbox"/>	<input type="text"/>	Receptive to ideas
<input type="checkbox"/>	<input type="text"/>	Imaginative
<input type="checkbox"/>	<input type="text"/>	Pragmatic



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSES: [CLOSING DATE]**

MEETING DISTRICT EXPECTATIONS

8. Our district is committed to ensuring all students receive a high quality education, challenging all students to do their best work, and helping our lower performing students and schools meet high standards. How well do you think we are doing in that regard?

- A - Exceeds expectations
- B - Above average
- C - Average
- D - Needs improvement
- F - Fails

Comment: (optional)

9. Our district is committed to hiring and retaining a high quality teaching, administrative and support staff. How well do you think we are doing in that regard?

- A - Exceeds expectations
- B - Above average
- C - Average
- D - Needs improvement
- F - Fails

Comment: (optional)



**ONLINE SURVEY
[DISTRICT NAME]
SUPERINTENDENT SEARCH 2017
SURVEY OPENS: [OPEN DATE]; SURVEY CLOSES: [CLOSING DATE]**

BACKGROUND INFORMATION

PLEASE TAKE A MOMENT TO PROVIDE THE FOLLOWING INFORMATION:

10. My perspectives come from being a (check all that apply):

- Parent/Guardian
- Student
- Community Member
- Teacher
- Classified Employee
- Administrator
- Other Certificated
- School Volunteer
- Public Official
- Business Owner / Partner
- Non-Profit Staff / Board