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# San Dieguito Union High School District

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## *Proposal for Search for Superintendent of Schools*



**HYA** Executive Search  
Hazard, Young, Attea & Associates



# HYA Executive Search

Hazard, Young, Attea & Associates

May 17, 2016

Ms. Beth Hergesheimer, Board President  
San Dieguito Union High School District  
710 Encinitas Boulevard  
Encinitas, CA 92024

Dear Ms. Hergesheimer and Members of the Board of Trustees,

Thank you for the opportunity to present this overview of the services that Hazard, Young, Attea & Associates (HYA) would like to provide to the San Dieguito Union High School District in its search for a new superintendent. HYA is uniquely qualified to assist you in this important work. HYA's comprehensive approach to the search process and its full complement of school board support services distinguish it from other firms.

The enclosed information is provided in response to your request for proposals. Please know that HYA's network of California-based and national associates would be honored to serve as your consultants in a selection process tailored to the unique leadership needs of your District.

It is proposed that your District's search be led by myself, Dr. Carolyn McKennan, and Dr. Diane Siri. Dr. Siri and I are both California educators and former superintendents, who will devote as much time as necessary to guide you through the screening and selection of an exemplary superintendent. We will be joined by Ms. Anita Johnson who has an extensive background in assisting school districts in executive searches.

Thank you for your consideration of our enclosed proposal.

Sincerely,

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

Enclosure

HYA Executive Search Division, ECRA Group, Inc.  
831-295-0982 • [hya@ecragroup.com](mailto:hya@ecragroup.com)

West Coast Regional Office  
530 Lytton Avenue • 2nd Floor  
Palo Alto, CA 94301



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## Proposal and Description of Services for San Dieguito Union High School District

### Introduction

Thank you for considering Hazard, Young, Attea and Associates as search consultants for the San Dieguito Union High School District's selection of District Superintendent. Hazard, Young, Attea and Associates (HYA) is one of the nation's leading superintendent search firms, with associates based in California, and throughout the country. The firm's search and selection processes will identify an ideal Superintendent for your District in collaboration with the Board of Education.

HYA proposes that the San Dieguito Union High School District (SDUHSD) search team, if selected, will be Dr. Carolyn McKennan, Dr. Diane Siri, and Ms. Anita Johnson. Dr. McKennan is the West Coast Regional President of HYA and Dr. Siri and Ms. Johnson are Associates of the firm.

Dr. McKennan and Dr. Siri are retired school superintendents. They understand the leadership needs of high school systems. Both have served in virtually every position in public education; from classroom teacher, to principal; in various assistant superintendent roles; and as superintendents in districts of every configuration and size from elementary to union high school, and unified. Their teaching experience spans from elementary to high school. Ms. Johnson brings a unique perspective to the team based on her wealth of experience in assisting districts and organizations with recruitment and selection of educational leaders.

The Search Process and Services are described as follows:

### **Management Team Approach**

HYA assigns an individual management team to each executive search that it conducts. They assume direct responsibility for the search and coordinate the activities of the other associates engaged in the project. Additional associates are generally engaged as needed, with all 150+ associates in the firm tasked with identifying prospective candidates for the search. An assigned team also ensures that individuals closely associated with the search are available to respond to any request the client board may have on the board's time schedule.

The specific role of each search team includes helping schools create an initial structure for their search by:

- assisting with leadership profile development;
- providing valuable feedback about the school district based on HYA research and professional understanding of the district's standing in the broader marketplace;
- aggressive and insightful recruiting of candidates;
- screening potential candidates by means of preliminary interviews and background checks;

- reviewing candidates’ references and tapping HYA’s own confidential network to gain reliable information and;
- assisting the board and new superintendent to assure a successful transition.

In brief, HYA consultants work with the Board and/or search committee – meeting as often as needed - maintaining direct and frequent communication – until a new superintendent is employed.

### The Proposed Management Team and Firm References

Upon the concurrence of the Board, HYA proposes the search team will be Dr. Carolyn McKennan, West Coast Regional President, Dr. Diane Siri, Associate, and Ms. Anita Johnson, Associate. The associates’ résumés are attached. Firm references are provided below for districts similar to San Dieguito Union High School District. Contact information for each board president is provided so that you may speak with board members who have worked with the HYA consultants being proposed or with board members in districts with similar demographics to your district.

District	Reference Name	Contact Information
Campbell Union High School District	Linda Goytia	408.230.7414
Centinela Valley Union High School District	Hugo M. Rojas, II	310.901.3461
Galt Joint Union High School District	Terry Parker Owing	209.810.0720
Los Angeles Unified School District	Steve Zimmer	213.241.6387
Santa Barbara School District	Annette Cordero	corderoa@sbcc.edu
Beverly Hills Schools	Lisa Korbatov	310.413.3223

In addition to the references listed above, a list of searches our firm has conducted in California is attached. An extensive list of the national searches HYA has completed is available upon request.

### Tenure of Placements

HYA has had a long history of success in working with Boards to find the right candidates who will provide long-term leadership to the school district. Of the 328 superintendents hired with HYA’s assistance since 2000, 90% of those individuals are still in their positions or have committed four years or more to the districts they served. The following data describes the tenure of those placements:

- 80% (263) are still in their position or retired from it
- 10% (32) stayed between 4 and 8 years - on average 5.1 years

### The Search Process

We propose a multi-phased search for candidates for the position of Superintendent. Recommended search procedures and cost estimates follow. The process outlined is defined in four phases and represents a prototypical search. However, HYA customizes each search to meet the needs of each school district or organization. Upon selection, the consultants will meet with the Board to discuss these procedures and modify them to meet the Board’s unique needs.

**If a Board elects to implement the tiered approach, HYA consultants would discuss the information gathered on internal or external candidates and determine if a sufficient pool exists to conduct preliminary interviews.**

## The Planning Phase

The first step of every HYA search is to hold a formal Planning Session. At this meeting, HYA consultants convene with the Board and proceed to customize the search and its process to the specific needs and requirements of the District, as articulated by those present. More specifically, HYA and the Board will cover and sort out central matters and considerations regarding the search, including:

- Review Board and consultant responsibilities for each phase of the search.
- Tailor the search to meet the needs of the District.
- Determine the role of staff members and constituents in the search.
- Determine the timeline and specific dates for search activities. The following is a tentative timeline for the search.
  - Planning session – May 20 after selection of search firm.
  - Board/community input sessions – week after Planning Session.
  - Presentation of a slate of candidates to the Board, after identification of criteria desired in the new superintendent.
  - Interview of candidates – ideally within 1 - 2 weeks of slate presentation.
  - Selection of new superintendent.

*(The exact dates and times for these activities will be developed in cooperation with the Board to ensure the availability of all Board members.)*
- Consider Board options and preferences with regard to advertisements.
- Discuss the compensation package to be offered to the new Superintendent of Schools.
- Agree upon a communication plan to keep the Board abreast of the search progress and the consultants alerted to issues that may arise from the Board.

## Criteria Development

A clear definition of the position and qualifications sought is crucial to each subsequent phase of a successful search. To assist the Board in clarifying the criteria desired in the new Superintendent, HYA will conduct individual interviews with each member of the Board and others the Board designates. HYA recommends extensive community involvement in providing input to the Board prior to establishing the criteria desired in the new Superintendent. Up to four consultant days are allocated for the purpose of soliciting input through individual interviews, focus groups and general forums (open to all stakeholders). It is recommended that the consultants facilitate the interviews, focus groups and general forums so as to maintain objectivity in determining what respective stakeholder groups value in the District, the issues they foresee, and the characteristics they would like the new Superintendent to possess.

In addition to the personal interviews, HYA has developed an online survey that can be completed by any stakeholder. The data collected from the online survey and interviews with Board members, staff and the various stakeholders will be compiled in a Leadership Profile Report, which will be presented to the Board in both oral and written formats. Working with the Board, specific profile characteristics emerge from the results of the Leadership Profile Report and are subsequently incorporated into recruitment material. From experience, HYA has learned that one of the most crucial aspects of a successful search is the careful and explicit formation and enumeration of the criteria used in the selection process. Overall, this leadership assessment process has been highly successful in determining critical attributes, while invariably building positive public relations.

Some of the critical decisions to be made during the planning phase of the search involve confidentiality versus the release of the names of candidates under consideration. The desire for confidentiality on the part of candidates versus the desire of the community to know as much as possible about the candidates under consideration is an important issue for the Board to consider in order to weigh the impact of the approach to be followed.

HYA prides itself on the extensive time and energy that our associates commit to working with local community and staff members to determine what they seek in their next superintendent. This information is essential to the Board in making their decisions about the “Desired Characteristics” of their next Superintendent. While these steps in the process will satisfy the need for involvement in some communities, other Boards and communities have determined they wish to have more involvement and in some cases complete transparency in vetting and determining the preferred candidate.

HYA has developed a range of approaches to meet these varying needs of different communities as the Board determines which is the best approach for their community. The chart below describes the range of approaches along with the positive and possible negative impact of each approach.

### Community Engagement & Confidentiality Options

	<b>Full Disclosure of Candidates Interviewed</b>	<b>Finalists Names with Community Forums</b>	<b>Confidential Stakeholder Committee Involved</b>	<b>Completely Confidential</b>
<b>Description of Option</b>	The names of all candidates being interviewed by the Board are released to the public.	The name of the three finalists being interviewed would be released and community forums would be held to meet the candidates.	No names of candidates would be released publicly, but the Board would have a staff/community committee interview the finalists to provide feedback.	Board conducts all interviews and keeps names of candidates completely confidential throughout the entire process.
<b>Questions Related to Option</b>	What benefit does it provide to release the name of all applicants interviewed?	What input would be sought from community members after meeting candidates? How will stakeholders gather information?	What feedback and input does the Board want from the committee? How to structure committee membership?	Do the community and staff accept that this is the Board's decision? Will there be push back?
<b>Benefits of Option</b>	Staff and community members will see the process as totally open and feel the Board is being as transparent as possible.	Stakeholders will have an option to meet the finalists and express an opinion on their preference.	Some stakeholders will be involved and will provide input to the Board in making their decision, which may provide information that	The Board will have the broadest field from which to select their next superintendent.

			would be helpful with their decision.	
<b>Drawbacks of Option</b>	Very few if any active superintendents will consider the position. Stakeholders will make judgments about the Board's decision based on whatever information they gather on their own.	Stakeholders will form an opinion on their preference and may feel the Board did not listen to them if a different candidate is chosen. Successful superintendents will be unlikely to put their name into consideration.	Some stakeholders may feel the process is not open enough as they will want to know who is being considered. Some members of the committee may violate the confidentiality agreement. Some candidates may not apply.	Stakeholders may feel the Board is not interested in their views. Community reaction may impact the acceptance of the preferred candidate. If confidentiality is violated, it may be viewed that a board member did so.

## The Recruitment Phase

A key factor of a successful search is effective marketing and aggressive recruitment of successful individuals who may not be seeking a new position. To this end, HYA will aggressively identify individuals who meet the criteria identified by the Board and actively recruit them to consider this position. Identification and recruitment is done in a variety of ways including the following:

- Announcements of the vacancy will be placed on a number of websites including HYA’s ([www.hyasearch.com](http://www.hyasearch.com)), which will be linked to the District’s website. It also will be posted on ACSA’s EdCal, EdJoin, Education Week, and other educational websites. The strengths of easy-to-use technology will be maximized when the District creates a superintendent search page and posts the link for the Leadership Profile Survey.
- Advertisements will be placed in national and/or regional publications as agreed upon with the Board. Ad content will be shared with the Board members prior to publication to ensure they reflect the intent of the Board. All material will indicate that the District is an equal opportunity employer.
- Subject to the Board’s approval, all members of the groups with whom HYA consultants meet in the Leadership Profile Development process will be invited to nominate individuals they feel are highly qualified for the position. On occasion, the preferred candidate is identified through such a nomination. Regardless, it reinforces the Board’s intent to have an open, unbiased search embracing candidates from within, as well as beyond, the local area.
- To initiate the search for candidates, contacts throughout the nation will be advised of the vacancy and asked to help identify individuals who match the criteria the Board has identified as desirable in its next Superintendent. Included in this communication will be superintendents reaching every region of the country and leaders of state and national educational organizations, university officials, foundation executives, state education department personnel, and individuals in business, government, industry and the military who have an interest in school ventures. Members of the firm are active professionally in state and national organizations affording ongoing identification of emerging educational leaders with unusual talent and promise.
- Members of the firm will contact prospective candidates who meet the criteria established by the Board. Additional candidates will be sought through personal contact with a number of individuals who work with and/or are aware of a broad spectrum of superintendents.

- Complementing nominations received and utilizing candidate information generated from over 1,000 successful executive searches, HYA will aggressively recruit candidates for the position. In addition, HYA staff will send frequent announcements regarding the search to all associates.

HYA has learned that technology facilitates and enhances the application process, and thus requires all candidates to apply online. The applications will be reviewed and acknowledged by the consultants. During this phase of the search, HYA usually initiates communication with and conducts preliminary reference checks on the most promising applicants in anticipation of an interview. All materials received for this search will be considered confidential and provided to no one except on a need-to-know basis, in a manner consistent with both federal and state law.

Toward the close of the search, HYA will review all application materials carefully – with the guidance of the Board-established criteria – and typically identify 10 to 15 candidates for particular consideration. These individuals will undergo additional reference checks, internet searches, and, as appropriate, initial interviews with representatives from HYA. It is the practice of HYA to personally interview any candidate prior to making recommendations to the Board. As in all phases of the search, HYA adheres to strict guidelines of confidentiality.

Of note, HYA's examination of a candidate's background reaches beyond the handpicked personal and professional references provided by the candidate. Our ability to gain important background information regarding our candidates – beyond that which merely appears in an individual's official file – is a unique and distinguishing characteristic of our firm, and is attributable, in part, to the integrity of both the firm and our associates, and the vast network of professional relationships built through their years in the education field.

## The Selection Phase

Upon completion of initial interviews, HYA will present a select slate to the Board. The number of candidates to be submitted will be determined by the Board during the initial Planning Session. Prior to presenting the slate (or in a separate advance session, if preferred), the consultants will conduct a seminar for the Board designed to prepare it for candidate interviews. This seminar will include written guidelines and protocols to ensure informative and comprehensive interviews.

Prior to this workshop, HYA will solicit questions, hypothetical situations and/or topics of interest, identified by the Board as desirable topics of discussion for the Board's initial interviews with the candidates. Such feedback will be developed into an Interview Script, which will be reviewed and revised during the aforementioned workshop and then used by the Board during the first round of interviews. The second interviews are generally unscripted and designed to follow-up on topics and questions identified during the first interviews. They also include an informal session such as a dinner with the candidate and his/her spouse or significant other if desired, as well as the formal second interview.

The consultants generally do not sit in on the Board interviews but will be available for counsel or direct assistance to the Board throughout the interview process. The consultants will facilitate each



decision-making session of the Board, if desired. Such involvement permits more active engagement by all Board members in both the general search process and the specific dialogue regarding the candidate pool. In facilitating the decision-making process, HYA assists the Board in assessing the abilities of the respective candidates in relation to the criteria identified by the Board. After the Board identifies a preferred candidate, usually after the second round of interviews, HYA can facilitate the completion of a comprehensive background check on the finalist by an independent, third party firm – Baker Eubanks. This background review will confirm degrees attained, any data regarding the candidate on file with the criminal and domestic courts, as well as a review of his/her driving record and credit history. The firm can also conduct both print and social media reviews of the candidate. If desired the Board can conduct the reviews on multiple candidates before second interviews are conducted as long as the search calendar provides sufficient time to complete this step prior to second interviews. The options for background checks will be reviewed and determined by the Board at the Planning Meeting.

Should the Board decide to do a site visit HYA also will assist in arranging the visit to the finalist's community in order to ensure that the Board's research will be as comprehensive as possible. These steps are important components of the selection process.

## The Appointment Phase

Once the Board has determined their finalist and is satisfied with the successful completion of their due diligence review, the next step for the Board is to reach agreement on the contract terms to be offered. The HYA consultants will assist the Board in facilitating mutually agreeable terms with the preferred candidate. Once terms are determined, the consultants are available to work with the Board and/or its attorney in the preparation of a draft contract. It is highly recommended that the final contract be approved by the District's legal counsel prior to presentation to the candidate.

After the successful candidate accepts the offer, HYA will assist the Board in making the appropriate announcements and introducing the candidate to the community. HYA consultants will also contact all applicants, confirming the appointment and extending the Board's appreciation to all candidates. HYA advises the Board president to send a letter to the candidates interviewed by the Board.

## Post Appointment

In addition, HYA can assist the Board and new superintendent in developing and implementing a successful transition plan. These services, which include a roles and/or goal setting workshops, facilitation of the first year superintendent's evaluation and mentoring support throughout the year can greatly enhance the success of the new superintendent as s/he assumes the leadership role in the organization. The costs associated with these additional services are described in the cost section of the proposal, and can be adjusted based on the level and frequency of the services desired.

HYA is also able to provide its clients a wide range of information management and accountability services to help support board governance and superintendent appraisal. Examples of such services include, but are not limited to 360° evaluations, strategic and long-range planning, community dashboards, and value-added impact analysis of programs and personnel.

## Communication with the Board

HYA believes that communication and organization are critical to successful searches. These elements start even before the Planning Session. Prior to this meeting with the entire Board, each Board member will receive a detailed Planning Session agenda. A successful search relies on two-way communication throughout the search. In addition to the preparation of the agenda and meeting for the Planning Session, following are the formal and informal communication expectations for this search:

- A search manual will be provided to assist school board members in preparing for search activities and organizing all related material.
- *A dedicated search portal can be established so that the Board can have confidential access to all information associated with the search through electronic communication.*
- A clearly defined Planning Session will be held, during which all aspects of the search process will be discussed and decided.
- A comprehensive summary of the Planning Session will be sent to each Board member within three days of the meeting.
- A Leadership Profile Report will be sent to each Board member. The Report will summarize the input received from interviews with each Board member, individuals and groups with whom the Board requests the consultants to meet.
- The consultants will provide an oral report on the Leadership Profile findings and respond to questions at a public meeting to be determined by the Board.
- A workshop will be held with the entire Board to develop specific criteria to be sought in the new Superintendent. The criteria will be developed utilizing the findings of the Leadership Profile Report and Board members' knowledge relative to the District's future needs and challenges.
- Each Board member will be asked to identify questions, hypothetical situations or topics of interest that are important to consider in selecting the new Superintendent. These will be drafted into an Interview Script for the Board to review and revise, and eventually use in the interview of candidates.
- A workshop will be held to prepare Board members for successful candidate interviews.
- The slate will be presented to the Board in person. During this session, each Board member will be provided comprehensive written and verbal information relative to each candidate being recommended for an interview.
- **Should the Board elect to implement a tiered search process, the consultants will discuss the input from key stakeholders interviewed during the development of the Leadership Profile and determine if any internal candidate(s) meets the Board's desired characteristics for the new superintendent.**
- The consultants will meet with the Board after each set of interviews to assist the Board in its debriefing and selection of semi-finalist candidates, and ultimately a preferred candidate.
- In addition to the above formal communications, HYA will provide progress reports via email or regular mail to all Board members, as agreed upon during the Planning Session. The consultants assigned to the search also will be available as needed via phone and email.

Board members will receive the business, home and cell phone numbers, as well as the email addresses, of the consultants. HYA's office staff, which is highly knowledgeable and pleased to assist at any time, also will be available to the Board toll free from 9:00 a.m. to 5:00 p.m. CST, Monday through Friday.

## Extent of Services & Guarantees

HYA provides four guarantees to Boards when they contract with us for a search. They are:

- 1) Fixed Price** - The consultant fee is a fixed fee from the time of accepting our proposal until a Superintendent is employed. If there is a need to reopen a search because the chosen candidate decides not to come to the District or because the Board desires to see additional or different candidates, these search activities will be provided at no extra cost in the consulting fee.
- 2) Two-Year Window** - If the Superintendent departs from the position during the first year under any circumstances or within (2) years if the majority of the Board is still in place, HYA will conduct a new search for the Board at no additional cost barring expenses.
- 3) 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 his/her leaving the District in less than five (5) years unless the Board advises HYA that the Superintendent may seek another position or the Superintendent is no longer employed by the Board.**
- 4) 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).

## Cost Proposal

The following is the pricing for the two options:

Option 1: **Comprehensive Search: \$27,000**

*Includes: \*\*Advertising, Consultant Expenses*

Option 2: **Tiered Search: \$16,000** (after selection of internal candidate)

*Includes: Consultant Expenses*

(\*\*Advertising cost to include two Association of California School Administrators (ACSA) ads and one inclusion in the HYA bi-weekly ad in Ed Week, along with online advertisements on the websites of the California Association of Latino Administrators and Superintendents (CALSA) and the California Association of African American School Administrators.)

A mutually agreeable change in the fee will be established if the Board desires the consultants to have a greater or lesser involvement in any phase of the search or to provide services in addition to those delineated in this proposal. The cost of additional days of service beyond those defined in the proposal is \$750 per day.

## Optional Expenses

- **Advertisements.** If the Board wishes to advertise beyond the scope of services provided in the cost proposal listed above, HYA can facilitate additional ads at reduced rates with national and state venues
- **Independent Background Checks.** HYA has negotiated a reduced rate at \$850 per candidate to have independent, third party background checks and conducted by Baker-Eubanks. HYA recommends that an independent background check be completed at least on the identified preferred candidate before an announcement is made. HYA can also facilitate having print and social media reviews conducted if the Board so desires.

## Payment Schedule

Our consultant fee is due in installments: (1) 50% upon contract signing, (2) 25% presentation of the Leadership Profile Report, (3) 25% upon presentation of slate of recommended candidates. Expenses, generally, are billed approximately two weeks after the search is concluded.

## Workshops and Other Optional Services

HYA offers a variety of Board workshops, training and support services that could be of benefit to Boards and new superintendents during the transition period and the superintendent's first year in the school district. The most commonly requested workshops are:

- The "Roles Workshop" requires 3-4 hours and provides the Board with an opportunity to clarify the respective roles of the Board and the Superintendent. The workshop addresses the concepts of trusteeship, governance, management, continuous improvement and systemic change. Developing and maintaining effective Board - Superintendent relations, the need for long and short range planning, consensus decision-making and other components of successful boardsmanship also are discussed at this workshop. Typical cost is \$3,000.
- The "Post-Employment Workshop/Retreat" requires 6-8 hours and generally is conducted on a Friday evening and Saturday. At this workshop, the roles developed by the Board at the prior workshop are reviewed with the Superintendent. This workshop/retreat also provides the Board with an opportunity to determine what it desires to have the Superintendent achieve during his/her first two years in the position. These goals are clarified and reduced to writing. The workshop/retreat also provides an opportunity to establish mechanisms to initiate or reinforce the concept of continuous improvement and to monitor the achievement of the Board's expectations. Processes and instruments for performance evaluation of the Superintendent and the Board will be developed. As part of this workshop, the Board and Superintendent will be provided an opportunity to consider the use of HYA's recently developed research-based, 360-degree evaluation process. Typical cost is \$5,000.
- Comprehensive First-Year Support – In addition to the two workshops described above, HYA would also provide ongoing mentoring for the new Superintendent to provide periodic check points (at least six times during the year) on progress towards the goals and work in the

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District. The mentoring relationships will be designed between the HYA consultant and the new Superintendent with input from the Board. Comprehensive support also includes facilitation of the Board's first year evaluation of the new Superintendent using the evaluation process agreed upon during the aforementioned workshop-retreat and/or HYA's recently developed research-based 360-degree superintendent evaluation process. The specific plans and approach for these services will be determined by the Board and new Superintendent, with facilitation by the HYA consultant. Typical cost is \$12,500.

HYA also creates customized workshops to meet the specific needs of the Board. These can be designed to meet the specific needs, timelines, and price points desired by the Board.

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader for San Dieguito Union High School District. Please contact us at 847-318-0072 or at [hya@ecragroup.com](mailto:hya@ecragroup.com) if you have any questions or need for additional information.

# CAROLYN MCKENNAN

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## 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

**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; SCELCA, 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.

**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; SCELCA, 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.



**ANITA JOHNSON****EDUCATION**

B.A. California State University, Los Angeles, CA 1967

**PROFESSIONAL EXPERIENCE**

- 1996-Present Executive Director and President, National Center for Education Research and Technology  
(National organization of school district superintendents)
- 1988-1996 Vice President, Management and Consulting Services, School Research and Service  
(CA K-12 curriculum and assessment organization)  
Assistant Executive Director, Applied Technology Center for Education  
(National organization of school district superintendents)
- 1978-1988 President, Personnel Research Center, CA  
Vice President, Center for Management Negotiation Strategies
- 1970-1978 Director of Personnel, Rowland Unified School District, CA
- 1966-Present Executive Search Experience
- Develop recruitment, selection and compensation plans for executive positions in city and county government and special districts including, city manager, police chief, fire chief and general manager and administrative positions, as well as highly technical positions.
  - Advise school boards of education on the recruitment and selection of superintendent and other executive-level positions. Examples include: Sacramento USD, Oakland USD, Santa Clara County Office of Education, Conejo Valley USD, Eastside Union High School District, Perris Union High School District, Rowland USD, Lake Elsinore USD, Berkeley USD, Albany USD, Medford USD (OR), Lake Oswego SD (OR), San Ysidro SD, Alpine USD. Also, advised the governor of Wyoming and worked with the State Board of Education on the recruitment and selection of a State Director (superintendent) of Education.

**CURRENT/PAST PROFESSIONAL ACTIVITIES AND AFFILIATIONS**

American Association of School Administrators  
International Public Administrators Association – Human Resources  
Association of California School Administrators  
Personnel Testing Council of Southern California  
CODESP, founding committee member and officer  
California School Personnel Commissioners Association, founding and organizational committee  
Co-Author of two books on California Collective Bargaining  
Co-Authored monthly employer-employee relation report for LACOE (School Employers Association) to provide to Los Angeles County School Districts  
Co-recipient of a two-year federal grant to provide employer-employee relations professional development (state-wide) to school administrators  
Advanced Certification Team Leader and Facilitator, American Productivity and Quality Center (APQC)  
Arbitration certification, American Arbitration Association  
Certification in interest based bargaining, California State Mediation and Conciliation Services

## 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
*Burlingame ESD	Superintendent
Capistrano 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
Hillsborough City School District	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
Mountain View	Superintendent
Ocean View School District	Superintendent
Pajaro Valley USD	Deputy Superintendent
*Palo Alto USD	Superintendent
Piedmont USD	Superintendent

## California Searches Conducted by Hazard, Young, Attea & Associates

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

\* Denotes multiple searches



1475 E. Woodfield Road, 14<sup>th</sup> Floor  
Schaumburg, IL 60173

**JGCONSULTING**

ITEM 3

**Executive Search Services  
Superintendent**



**RFP Proposal**

**May 18, 2016**

# JGCONSULTING

ITEM 3

## MEMORANDUM

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Dear San Dieguito Union High School District Board of Education:

JG Consulting welcomes the opportunity to serve San Dieguito Union High School District as the executive search firm for the purpose of retaining the superintendent of schools. Our firm will manage the search process in collaboration with the board of education. Our mission is to provide an equitable process while maintaining the district's standard of quality. We aim to accomplish this objective in a timely and cost-efficient manner with a benchmark of professional achievement and integrity. JG Consulting represents the school district and not the individuals seeking professional positions.

JG Consulting works with school districts to find Superintendents, CEO's, Chancellors, Directors and also cabinet-level administrators and regional-level administrators. We are committed to the long-term success of our district partners. Our commitment begins with successfully matching candidates and school districts upon the completion of the candidate profile. JG Consulting acknowledges the importance of supporting the search needs for cabinet-level personnel to ensure a strong intersection of district leadership.

Our recruitment efforts will span the country among various educational entities. The business methodologies implemented during the executive search process will equip the district with access to every facet of our country's education ecosystem to successfully achieve the district's staffing needs. JG Consulting will be a dedicated partner of the district and will make every effort to communicate accordingly with everyone involved in the hiring process.

Our firm's expertise is perfectly aligned to serve the San Dieguito Union High School District during the executive search process. We understand the ultimate goal is to improve the academic achievement of every student, and we welcome the opportunity to partner with the district to achieve this goal. Lastly, JG Consulting will guarantee a successful search.

Respectfully,

*James Guerra*

James Guerra  
Owner & Principal Consultant

JG Consulting | A "One-Fourth Consulting, LLC" Company  
P: (214) 934-5537  
F: (888) 765-3731  
E: [james@jgconsulting.us](mailto:james@jgconsulting.us)

Corporate Office:  
300 Convent St., Ste. 1330  
San Antonio, TX 78205



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# JGCONSULTING

## INTRODUCTION & BACKGROUND

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JG Consulting has specific attributes unique to the firm:

**JG Consulting focuses on human capital.**

Our firm has diverse and rich relationships within the educational ecosystem including the school boards we support. We strive to develop new relationships with each new search.

JG Consulting promises ongoing communication with the school board, district, community organizations and candidates to ensure a seamless executive search process. We will seek community input at the board's request.

**JG Consulting works nationwide.**

Our success has strengthened our relationships with many administrators across the country and we have vast access to a great talent pool that has made professional commitments to working in various markets.

The executive search services will be performed from Texas but James Guerra and the search consultants will work with the board of education onsite as often as necessary.

**JG Consulting has integrated a unique technology platform for recruitment efficiency.**

Our firm is connected to rising talent in districts across the country and we need to effectively connect with everyone in real-time.

We have integrated a unique technology platform, "Montage Talent, Inc.," unlike any other firm in the country that will allow the district to review candidate interviews and profiles on-demand. This tool enables us to efficiently recruit candidates with specific experience and skill sets while saving the district additional expenses.

**JG Consulting accessibility and team members.**

Our team is accessible anytime during each phase of the executive search process.

James Guerra will serve as the Principal Consultant through the executive search process. He is the Owner of JG Consulting; a One-Fourth Consulting, LLC company. James has been working in the education space since 2004.

Dr. Patricia Linares will serve as the Senior Search Consultant to the Board. Dr. Linares was most recently the Interim Superintendent of Schools for Fort Worth Independent School District. She is a long-time practitioner and she is well-versed in the executive search methodologies serving as the team's faculty leader.

Joe Coto will serve as a Search Consultant to the Board and consulting team. Mr. Coto has served as the Superintendent of Schools for East Side Union High School District and Oakland Unified School District. He is a former California Superintendent of the Year.

**JG Consulting is committed to working in any district that seeks quality leadership.**

We pride ourselves in working with specific districts with intentional focus. We do not aim to support every district search opportunity because we want to build long-term relationships with any district committed to seeking the most qualified candidates for their school system.

**JG Consulting will provide a national scope for the executive search engagement.**

We work with school districts and district leaders every day. Our commitment is grounded in best practices to promote academic achievement.



## EXPERIENCE

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### JG Consulting experience.

Please refer to "Exhibit A" for the Curriculum Vitae of the designated consultants associated with the superintendent executive search process.

### Consulting Team Information:

**James Guerra**  
**Owner & Principal Consultant**  
Corporate Office:  
300 Convent St., Ste. 1330  
San Antonio, TX 78205  
P: (888) 765-3731  
C: (214) 934-5537  
E: [james@jgconsulting.us](mailto:james@jgconsulting.us)

**Dr. Patricia Linares**  
**Senior Search Consultant**  
4705 Cinnamon Hill Dr.  
Fort Worth, TX 76133  
C: (817) 996-5982  
E: [pat@jgconsulting.us](mailto:pat@jgconsulting.us)

**Joe Coto**  
**Search Consultant**  
176 Purcell Dr.  
Alameda, CA 94502  
C: (408) 823-1960  
E: [joecoto1@gmail.com](mailto:joecoto1@gmail.com)

**BJ Dominguez**  
**Operations Manager**  
1810 E Sonterra Blvd.  
San Antonio, TX 78258  
C: (210) 744-6285  
E: [bj@jgconsulting.us](mailto:bj@jgconsulting.us)

### School District References:

**Fort Worth Independent School District**  
**Jacinto Ramos, Board Chairman**  
100 N. University Drive  
Fort Worth, TX 76107  
P: (817) 814-1920  
E: [jacinto.ramos@fwisd.org](mailto:jacinto.ramos@fwisd.org)

**San Marcos Consolidated Independent School District**  
**Kathy Hansen, Board Chair**  
501 South LBJ Drive  
San Marcos, TX 78666  
P: (512) 393-6744  
E: [kathy.hansen@smcisd.net](mailto:kathy.hansen@smcisd.net)

**Ysleta Independent School District**  
**Dr. Xavier De La Torre, Superintendent**  
9600 Sims Drive  
El Paso, TX 79925  
P: (915) 434-0032  
E: [xdelatorre@yisd.net](mailto:xdelatorre@yisd.net)

**New York State Education Department**  
**Jhone Ebert, Senior Deputy Commissioner**  
89 Washington Avenue  
Albany, NY 12234  
P: (518) 474-3852  
E: [jhone.ebert@nysed.gov](mailto:jhone.ebert@nysed.gov)

**Minneapolis Public Schools**  
**Betsy Symanietz, Human Capital Coordinator**  
1250 W. Broadway Avenue  
Minneapolis, MN 55411  
P: (612) 668-0529  
E: [betsy.symanietz@mpls.k12.mn.us](mailto:betsy.symanietz@mpls.k12.mn.us)

## SUPERINTENDENT EXECUTIVE SEARCH: WORK PLAN

### 1. Planning Discussion & Board Interviews

- 1:1 meetings with each member of the school board
- Define the scope of work for the search.
- Review and provide input on the job description, qualifications, competencies, selection criteria, legal requirements, newspaper and educational publications, announcements, search calendar, and compensation package.
- Discuss any issues and expectations for the position.
- Determine the search and selection procedures including the search calendar.
- Discuss the recruitment of candidates.
- Discuss the screening process and preliminary evaluation.
- Discuss the interviewing process.
- Discuss the selection and hiring activities.

### 2. Communication Protocols

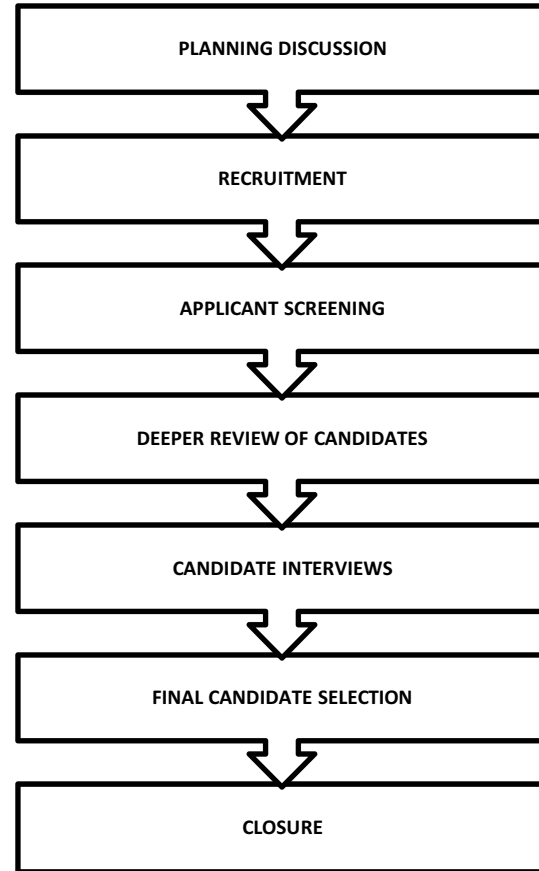
- We will assist with marketing, advertising, and communication for the available position. These efforts will include advertising in newspapers and educational publications, on various websites with state and national organizations and higher education institutions. We will develop an advertising plan for the Board's approval.

### 3. Candidate Recruiting

- We will create a search strategy according to the unique needs of the district. We will not rely on advertising and job postings. Our firm will proactively engage with candidates across the vast educational ecosystem including national and state affiliations, private sectors and non-profit sectors.
- JG Consulting will distribute countless e-mails with the position profile and make countless phone calls to potential candidates and sources.
- We ensure a balance of gender and ethnicities among the qualified candidates we present. We will actively recruit traditional and non-traditional candidates that have successfully demonstrated leadership capacity.
- Our national networks will provide access to the for-profit, not-for-profit, and education communities nationwide. We utilize these channels in every search. Our network includes individuals within national and state education boards, political leaders and business leaders.

### 4. Candidate Reviews

- We will review all communication from interested candidates seeking information on the position to determine if they meet minimum qualifications.
- Candidates who meet the minimum requirements will be asked to furnish additional information that will enable us to further evaluate their skills and experience according to position profile.



# JGCONSULTING

## ITEM 3

5. Applicant Screening
  - Candidates that successfully pass the pre-screening process will be presented to the district for discussion and determination for the first phase of interviews.
  - Additionally, JG Consulting will conduct thorough background checks of each candidate with a third-party
6. Candidate Interviews
  - JG Consulting will provide comprehensive profiles of each candidate selected for an interview.
  - Profiles will include a synopsis completed by the firm, access to the Montage Talent, Inc. interview portal for each candidate presented, responses to preliminary screening questions, detailed responses from the personal interview rubric, and a comprehensive background check by third-party, completed reference checks and original resume.
7. Deliberation in the selection process of candidates for final consideration.
8. We will support the district when requested on final interviewing protocols.
9. Closure
  - We will contact all candidates as a process of the closing phase of the executive search. JG Consulting will also prepare final reports or a summary of expenses and assist in the announcement of the appointment, if requested by the district.



**SUPERINTENDENT EXECUTIVE SEARCH: SAMPLE WORK PLAN TIMELINE**

<b>Proposed Activities</b>	<b>Proposed Timelines</b>
1. Planning discussion to initiate search	May 20
2. Prepare materials, research recruiting channels within K12 and external networks; define marketing and recruiting strategies; conduct other activities as identified by the district	Ongoing
3. Marketing and Recruiting: dependent on position profile and job description <ul style="list-style-type: none"> <li>• Local, state, regional and national newspapers</li> <li>• Other education publications and websites</li> <li>• Campaigns: E-mails, calls, and in-person visits with referral sources and potential candidates</li> </ul>	May – June
4. Application due date	Late July  *To Be Determined
5. JG Consulting interviews and candidate screening; includes interview portal access	June – July  *To Be Determined
6. Prepare and present pre-screened applicants in a reporting format and with access to the interview videos	August
7. District interviews; may require multiple scenarios	Late August
8. Select a candidate for hire	September

\*Timeline is customizable to the needs of the district



**SUPERINTENDENT EXECUTIVE SEARCH: FULL SEARCH & TIERED SEARCH COST**

**Analysis**

<p>The estimated number of hours is dependent on the board of education’s deliverables to the firm. The average national executive search will typically last a minimum of 6-months but JG Consulting will correlate to the timeline goals set forth by the San Dieguito Union High School District Board of Education.</p> <p>The firm will work diligently onsite in the district with the board of education as often as requested. The team of consultants will also engage in various remote activities to ensure maximum productivity.</p>
<p><b>There are no publishing and advertising fees associated with the executive search. The firm will incur any and all costs. We rely on various outlets but primarily engage with our national networks.</b></p>
<p>JG Consulting will also incur the cost of the on-demand interview subscription, Montage Talent, Inc.</p>
<p><b>Payment terms are 50% of the contract value (net 30) and 50% upon successful completion of the search.</b></p>
<p>Our fee structure will be the same for either option, “<u>Full Search</u>” or “<u>Tiered Search</u>”, as the executive search team will meet with the internal staff, community stakeholders and parent committees identified by the Board of Education. These particular effort are a standard practice for each Superintendent search we perform nationally.</p>
<p><b>Total Cost For All Services Rendered = \$20,000 (All-Inclusive &amp; Not to Exceed; we will price match).</b></p>

Bid Contact Person:

**James Guerra**  
**Owner & Principal Consultant**  
 Corporate Office:  
 300 Convent St., Ste. 1330  
 San Antonio, TX 78205  
 P: (888) 765-3731  
 C: (214) 934-5537  
 E: [james@jgconsulting.us](mailto:james@jgconsulting.us)

**Exhibit A**

- Curriculum Vitae - *included as separate attachments*

## James A. Guerra

ITEM 3

[james@jgconsulting.us](mailto:james@jgconsulting.us) | (214) 934-5537

300 Convent St., Ste. 1330, San Antonio, TX 78205

### Summary of Qualifications

---

- Owner of a national consulting firm supporting school systems and K12 organizations
- Manage multiple projects simultaneously including executive searches
- Strong presentation skills in large audience settings
- National representation of school systems and K12 organizations
- Excellent analytical, written and verbal communication skills
- Proficient in Microsoft Applications, HTML, Sales Force, Sales Logix and Sugar

### Work Experience

---

**One-Fourth Consulting, LLC (JG Consulting, dba): Owner** Present

- Superintendent and senior leadership executive search services (national)
- Support a cadre of organizations in the K12 market space simultaneously
- Develop sales and change management strategies for our K12 partners
- Work closely with senior management to establish economies of scale
- Implement go-to-market campaigns for new products and services

**Knowledge Delivery Systems, Inc.: Sales Director** October 2013 to October 2014

- Enterprise sales consultant for large, urban districts in AR, AZ, CO, LA, NM, OK, and TX
- New business development with state departments and targeted districts
- Consultative selling introducing strategic PD models with change management support
- Collaborate with district cabinets to ensure effectiveness of new methodologies
- Manage each cycle of the sales process to attain annual goal of \$2.2 million

**Triumph Learning: VP of Strategic Sales** June 2013 to October 2013

- Work holistically across the country at the state level and district level
- Assist with new business development in the large urban markets
- Ensure retention of the top 45 clients
- Deploy sales strategies aligned with federal and state level grant opportunities
- Work with leadership team to develop new marketing strategies

**Education Elements: Regional Director, Growth & Development** May 2012 to April 2013

- Consult with all educational systems in AR, AZ, LA and TX
- Introduce blended learning strategies for all types of educational institutions
- Co-mingle efforts with local and national foundations to support blended learning needs
- Work collectively with state representatives and thought leaders to encourage change
- Leverage discretionary grants and federal grants to support our clients' needs

References Furnished Upon Request

**Position: Executive Director, West**

April 2011 to May 2012

**ITEM 3**

- Work with various governmental offices to support state initiatives in AZ, CA, NV and TX
- Manage Requests for Information (RFI) with the State Departments of Education
- Establish and maintain revenue with school districts, CMO's and private institutions
- Sell a web-based assessment and intervention resource for grades PreK-12
- Responsible for an annual goal of \$1,500,000

**Triumph Learning: Director of Strategic Sales, National**

November 2010 to April 2011

- Support the sales team nationally as a working manager
- Develop state-wide interest with icore- a digital Math and Science resource K-12
- Work with the leadership teams to meet the demands of state-wide initiatives
- Establish and maintain revenue with new and existing accounts (team and individual)
- Responsible for a personal goal of \$2,500,000 (annually)

**CompassLearning: Account Executive, Texas**

July 2008 to November 2010

- Develop new business for grades K-12 in Regions 7-11 and 15-19
- Sell a web-based solution as a supplemental or core resource to all educational entities
- Highly active role of cold-calling and presenting to prospective and existing customers
- Work with existing accounts to cross sell and up sell current implementations
- Responsible for quarterly and annual goals; annual quota of \$1,500,000 (new business)

**Cambium Learning: Inside Sales Manager, National**

October 2005 to July 2008

- Managed the Inside Sales Team and Account Management Team (10 people)
- Sell a web-based manipulative for Math and Science grades 3-12
- Sell to all domestic and international accounts
- Facilitate daily meetings, funding meetings, and sales objective meetings
- Responsible for an annual team goal of \$2,800,000

**Education**

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**University of Dallas: Graduate School of Management**

Candidate

- Masters of Business Administration, Business Management

**Texas State University: Bachelor of Arts, Public Relations**

2004

- Major in Mass Communication | Minor in Business Administration
- Sigma Alpha Epsilon Fraternity, President

**Professional Organizations**

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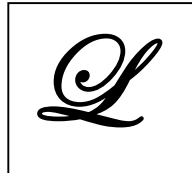
- American Association of School Administrators, Member Present
- Association of Latino Administrators and Superintendents, Member Present
- Texas Association of School Administrators, Member Present

**References Furnished Upon Request**

*Patricia A. Linares*  
*4705 Cinnamon Hill, Fort Worth, Texas 76133*  
*(817) 996-5982 Cell*

### Summary of Qualifications

- \* Accomplished leader with urban school experiences in district operations, finance, curriculum & instruction, personnel, staff development, and principal selection/training.
- \* Competent systems and analytical thinker, with a proven track record in improving student achievement among a diverse student population.
- \* Dynamic leader able to improve organizational effectiveness and productivity through critical analysis and problem solving.
- \* Consistent achievement in attaining results and strengths in organizational awareness, strategic orientation, demonstrating initiative, and performance results management.
- \* Gifted communicator, able to explain information clearly, recognizes excellent employees, and inspires staff to achieve their potential while working toward common goals.
- \* Skilled facilitator for collaborative relationships with employee and



**Interim Superintendent  
Fort Worth Independent  
School District**

Directed the operation, planning, development, administration, and instruction of all district- based programs in support of the Fort Worth Independent School District's mission to provide outstanding opportunities for academic achievement for 87,004 students. The Fort Worth Independent School District includes 83 elementary schools, 26 middle schools and sixth grade centers, 15 alternative and 19 high schools. The district's ethnic breakdown is 62.8% Hispanic, 22.7% African American, 11% Anglo and 3.5% other.

Lead a staff of 9,775 employees which included over 5,000 teachers and over 4,000 auxiliary employees.

In 2014-15 school year, 5,482 students took over 10,000 AP exams and students were given 35 million dollars in scholarships

Managed a nearly 700 million dollar budget and supervised a 498 million dollar bond program.

Worked effectively with a 9 member school board to enhance the educational opportunities for the children of our district.



*Patricia A. Linares*  
*4705 Cinnamon Hill, Fort Worth, Texas 76133*  
*(817) 996-5982 Cell*

Integrity Vision Leadership

**Educational and Professional Credentials**

- 1997** Doctor of Philosophy – Education Administration  
University of Texas at Austin
- 1993** Superintendent Certification, University of Texas at Austin
- 1992** Mid-Management Certification, Texas Woman’s University
- 1982** Master of Arts-Bilingual Education, Southern Methodist University
- 1979** Bachelor of Science – Elementary Education, Southwest Texas State  
University, Specialization – Bilingual Education

**Texas Certificates**

- Superintendent Certificate
- Mid-Management Certificate
- Provisional - Elementary (Grades 1-8) General
- Provisional - Bilingual/ESL

**Professional Experience**

***1996 – 2010 Fort Worth Independent School District***

**6/2014 – 11/2015 Interim Superintendent**

**Fort Worth Independent School District**

Responsible for a staff of nearly 10,000 employees who serve 87,000 students. The district is composed of 143 campuses including 83 elementary, 26 middle schools, 15 alternative schools, and 19 high schools. Student population consisted of 62.8% Hispanic, 22.7% African American, 11% Anglo and 3.5% other. Seventy seven percent of our students are economically disadvantaged and 31% are English Language Learners. Responsible for a \$ 696 million dollar budget and supervised a 498 million dollar bond program. The district transports 16,727 students daily through 1,668 bus routes. As Interim Superintendent, I worked daily with the board to ensure that each and every one of our students were provided a world class education. Increased community partnerships and enhanced our philanthropic support of our school system.

**2010- 2014 Retired**

**2009-2010 Deputy Superintendent**

**Fort Worth Independent School District**

**2005 - Present Deputy Superintendent School Leadership, Student Support Services & Human Resources**

**Fort Worth Independent School District**

Provide leadership to an urban school district of 80,000 students, 140 schools, with approximately 72% of students on free and reduced lunch. Direct the operation, planning, development, and administration of all student support services, including special education, guidance and counseling, psychological services, drop-out recovery, health services, after school programs and truancy court. Responsible for building strong city and business support for district's community based programs, after-school programs and truancy initiative programs. Direct, monitor and supervise the operations of all Human Resource functions including staffing, employee relations, compensation and investigations.

## **Initiatives/Accomplishments**

### **Student Achievement**

- \* Based on accountability data for 2008:
  - FWISD increased the number of high-performing schools in the 2007-2008 school year from 16 to 34 campuses.
  - As a district, at least 74% of ALL students are passing Reading, Writing and Social Studies at all grade levels, with all student populations passing at a rate of 70% or above.
  - Ninety percent (90%) of all students met the passing standard in Spanish Reading.
  - Sixty two percent (62%) of all middle school students and student populations were at the Commended level in Reading.
  - In elementary mathematics, overall passing rates remain well above the state standard with 72% of all students passing at 3<sup>rd</sup> grade, 76% at 4<sup>th</sup> grade and 85% at 5<sup>th</sup> grade. Hispanic students had 1% to 3% point gains and grade 3 students tested in Spanish had gains of 5-6% points.
  - The number of schools receiving Gold Performance Acknowledgements Awards increased to 27 for Reading, 21 for Math, 22 for Writing, 21 for Science and 6 for Social Studies.

### **Secondary Redesign**

- \* Developed a Theory of Action for implementing strategies for the transformation of high schools to small learning communities through the Texas High School Redesign Initiative. Included in this transformation was the implementation of:
  - a 130:1 teacher/student ratio at high school,
  - teaming for grades 6-10 which included professional development periods in the day for student conferencing and professional growth,
  - AVID implementation at all secondary schools,
  - student surveys at all schools,
  - College Connection with area colleges and universities and,
  - Summer transition camps for students entering high school and middle school to provide personalization, assistance, and mentoring for a successful secondary school experience.
- \* Increased the number of students receiving scholarships from 959 to 1,523 with scholarship dollars increasing from \$24,296,107 to \$55,128,842.
- \* One of three districts in Texas selected for participation in a national high school reform initiative.

### **District Initiatives**

- \* Implemented the PEAK (Public Educators Accelerating Kids) program for

the district; an initiative to re-energize and transform Fort Worth schools by reconstituting 9 of the lowest performing schools and instituting a “pay for performance” strategy that rewards collaboration, professional growth and innovative instructional practices.

- \* Developed Strategic Plan goals, performance measures and accountability assessments to support a District focus on improving student learning, promoting sound business practices and increasing parental engagement.
- \* Designed staffing formulas to increase efficiency while increasing student performance.
- \* Coordinated the University of Pittsburgh Institute for Learning-“Principles of Learning” Initiative designed to improve student achievement through efforts-based learning.

### **Student Support Services**

- \* Implemented a successful Special Education Inclusion Model district-wide to address the needs and academic achievement of our special needs students.
- \* Developed a comprehensive dropout prevention, intervention & recovery program (Project Prevail) designed to realign current programs and institute new initiatives which provided a comprehensive set of strategies and interventions to diminish the number of potential dropouts, and increase the number of recovered dropout students.
- \* Expanded the number of after-school programs to include academic programs and the fine arts in order to increase student involvement and participation. A total of 13,000 (unduplicated number) of students participate in these programs each year.
- \* Increased the Adopt-A-School Partners to from 244 to 273 in 2007-2008.

### **Leadership Development**

- \* Introduced an annual 2 day, off-site Principal’s Retreat at the beginning of each year to provide professional development to principals on data analysis, leadership skills, vertical articulation and effective instructional practices.
- \* Initiated the Aspiring Administrators Leadership Academy. This medical model, internship/residency program was developed and funded through a 3.5 million dollar grant received by the U.S. Dept. of Education.
- \* Initiated the restructuring of the principal evaluation system to focus on leadership competencies and real world expectations.
- \* Restructured monthly Principal and Assistant Principal meetings to focus on leadership development, book studies, curriculum and instruction and data analysis.

### **Human Resources**

- \* Recruited over 800 teachers for the 2007-2008 school year through a national and international recruiting campaign. The district was fully staffed with over 5,000 qualified teachers on the first day of school.
- \* Upgraded the data system to better monitor and record employee absences

- and ensure substitute teachers availability for campuses.
- \* Developed a new HR website to better serve customers to FWISD.
- \* Implemented a comprehensive Market Study of employee salaries and compensation benefits.
- \* Designed a New Teacher Mentoring and Induction Program with the aid of an \$800,000 grant from the state of Texas.

**2001 - 2005**

**Deputy Superintendent  
School Management, Curriculum &  
Instruction**

**Fort Worth Independent  
School District**

Responsible for the Curriculum, Instruction, School Management and Student Services departments. Provided direction, leadership, and assistance to the departments of curriculum, instruction, elementary school management, secondary school management, special education, guidance and counseling and psychological services.

**Initiatives/Accomplishments**

- \* Coordinated the alignment of the curriculum, instruction and the school management departments to better serve schools.
- \* Directed a comprehensive campus support and intervention model to provide data analysis, professional development activities, teaching strategies, and mentoring services.
- \* Implemented an Elementary School Initiative (ESI) to better serve high needs schools, to provide extra instructional days for students and additional professional development for staff.
- \* Organized the design and opening of two (2) new high schools, two (2) middle schools, four (4) 6<sup>th</sup> grade centers and 12 new elementary schools following a successful bond approval.
- \* Increased the number of high performing schools from 16 to 59 during the 2001-2003 school years (TAAS).
- \* Decreased the number of low-performing schools to 0 during the 2001-2003 school years (TAAS).
- \* Decreased the number of student placements into Special Education from 12% to 9%.
- \* Developed and implemented a Stay-in-School Initiative, which included a city/school district Truancy Court, Stay-in-School coordinators, and credit recovery labs at every high school in the district.

**1998 - 2001**

**Associate Superintendent  
School Operations**

**Fort Worth Independent  
School District**

Directed the operations all elementary and middle schools, 6th grade centers, high schools, and 25 special schools, of which 20 are alternative schools.

Provided supervision to 319 administrators and approximately 5,200 teachers, department of special education, guidance and counseling and psychological services.

**Initiatives/Accomplishments**

- \* Directed the reconstitution of two (2) low-performing schools by reassigning staff and hiring new principals and faculty to improve student performance.
- \* Redesigned and implemented assistant principal and principal selection process identifying leadership qualities and characteristics to support district priorities and goals.
- \* Implemented the Tutoring Initiative targeting all grade levels with the intent to improve reading and math.
- \* Reorganized the Special Education Department to better serve schools and students by realigning roles and responsibilities of diagnosticians, special education teachers, counselors and psychologists.
- \* Initiated the Supporting Teachers in Effective Problem Solving (STEPS) pre-referral process with the result being a decline in special education referrals decreasing 2,628 in 1997-98 to 876 in 2001-02.
- \* Engaged campuses in the Schools Attuned training based on Mel Levine’s work, which prepares teachers in the successful modification of classroom techniques for special education students.

**1997 - 1998**

**Assistant Superintendent  
Personnel Department**

**Fort Worth Independent  
School District**

Provided leadership to the District’s recruiting, hiring and staffing of 12,000 professional and auxiliary employees. Directed and managed human resources department to ensure legally sound and effective human resource management practices. Responsible for the development of and implementation of resource programs to include wage and salary administration, leave administration, employee relations, employee recruitment, selection and staffing. Interpreted and recommended personnel policies and regulations for the district.

**Initiatives/Accomplishments**

- \* Restructured the Human Resources Department to provide better customer service to schools, customers and patrons of the school district.
- \* Reconstituted offices to improve efficiency and effectiveness of the department resulting in more efficient and timely hiring of staff.
- \* Implemented a stipend policy to increase the recruiting, hiring and retaining of minority and critical shortage teachers.
- \* Initiated the district’s collaboration with the Ministry of Spain to implement the Spain Visiting Teacher Program.
- \* Created the Office of Special Investigations to better investigate and

- resolve personnel investigated issues.
- \* Redesigned the personnel records department to better organize and maintain district personnel files.
- \* Oversaw all personnel matters related to legal litigation and grievance procedures for the district.

**1996 - 1997**                      **Executive Director**                      **Fort Worth Independent**  
**Central Instructional Support Team**                      **School District**

Responsible for the instructional improvement of 26 campuses, elementary through high school. Supervised 22 curriculum and instruction specialists whose primary responsibility was to provide assistance to campuses by monitoring classrooms, disaggregating data, assisting new teachers, providing demonstration lessons, and conducting professional development at the campus and district level.

*1991- 1996      Texas Education Agency*

**1994 -1996**                      **Assistant to Commissioner -**                      **Office of the Commissioner**  
**Governmental Relations**                      **of Education**

**Senior Director**                      **Office School/Community Support**  
**Senate Bill 1 Communications**

Served as legislative liaison for the Commissioner of Education to the governor, the lieutenant governor, the speaker of the house and the representatives of the house and the senate of the 74th Texas Legislature. Acted as State's spokesperson and liaison in communicating the new education law (Senate Bill 1) and its impact on the daily operation of school districts. Responsible for the development, approval, and implementation of the state's first charter schools. Responsible for providing state and national legislative updates to the State Board of Education.

**Initiatives/Accomplishments**

- \* Coordinated the writing and passage of Senate Bill 1, a comprehensive rewrite of the Texas Education Code, with key legislators in the Senate and the House.
- \* Created comprehensive documents for the legislature that included side-by-side comparisons of previous law, commissioner's recommendation and legislative recommendations.
- \* Created documents for the Texas Legislative Budget Board identifying fiscal implications of recommended legislative policy changes.
- \* Created briefing books and question/answer documents for school districts identifying policy changes, and required actions by school districts for

compliance with Senate Bill 1.

<b>1992-1993</b>	<b>State Director - Centers for Professional Development and Technology</b>	<b>Texas Education Agency Office of Teacher Preparation and Certification</b>
	<p>Provided leadership in the development and implementation of the Centers for Professional Development and Technology (CPDT), a field-based teacher education program designed to prepare teachers in real life settings while integrating the use of technology in the classroom.</p>	
<b>1991 - 1992</b>	<b>Education Specialist</b>	<b>Texas Education Agency Office of Professional Development</b>
	<p>Responsible for the implementation of the Texas Teacher Appraisal System (TTAS) in the state. Provided professional development for district representatives in the areas of appraisal, evaluation and mentoring of teachers, Leadership development and strategic planning.</p>	
	<i>1976 – 1991 Dallas Public Schools</i>	
<b>1989 - 1991</b>	<b>Principal</b>	<b>Robert C. Buckner Dallas ISD</b>
	<p>Acted as instructional leader in a culturally diverse school of approximately 600 students with 75% of the students on free and reduced lunch.</p>	
<b>1988 - 1989</b>	<b>Interim Principal</b>	<b>John F. Peeler Elementary Dallas ISD</b>
	<p>Responsible for taking over a school in crisis with a student population of approximately 780. Student population consisted of approximately 80% Hispanic and 70% on free and reduced lunch.</p>	
<b>1987 - 1988</b>	<b>Assistant Principal</b>	<b>James Bowie Elementary Dallas ISD</b>
	<p>Served as instructional leader in a school of 50% African-American and 50% Hispanic and 95% of the students of free and reduced lunch.</p>	
<b>1986 - 1987</b>	<b>Teacher Advisor Program</b>	<b>Central Administration Dallas ISD</b>
	<p>Acted as an instructional support to new teachers and teachers at risk by</p>	



providing classroom assistance, evaluating lessons, and providing demonstration lessons. Assisted principals with monitoring of classrooms to insure effective teaching and improved student learning.

**1979 – 1986**      **Bilingual Educator**      **Stephen C. Foster Elementary  
Dallas ISD**

Educated students in dual language and transitional programs from grades 1-5 in a school of 750 students.

**Honors/Organizational Leadership**

**2007-2009**      Executive Board - National Association for Latino Administrators and Superintendents  
Co-Chair City of Fort Worth/Fort Worth ISD Coordinating Board

**2007-2008**      Committee Chair – Technology Committee - Texas Association of School Administrators (TASA)

**2005 – 2007**      Executive Board – Texas Association of School Administrators (TASA)  
Executive Board - National Association for Latino Administrators and Superintendents  
Co-Chair National Conference – National Association for Latino Administrators and Superintendents (ALAS)  
Co-Chair City of Fort Worth/Fort Worth ISD Coordinating Board

**2005-2006**      Partners in Education Award – University of Texas at Arlington  
Outstanding Administrator of the Year – Score a Goal in the Classroom Organization

**2004 – 2005**      Curriculum and Instruction Committee – Texas Association of School Administrators (TASA)  
2004 Woman Educator of the Year – Cultural Center of the Americas

**Professional Activities and Organizations**

Texas Association of School Administrators (TASA)  
American Association of School Administrators (AASA)  
Association for Latino Administrators and Superintendents (ALAS)  
Texas Association for Latino Administrators and Superintendents (TALAS)  
Association for Supervision and Curriculum Development (ASCD)

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Alameda, CA 94502  
408 823 1960  
[joe.coto@yahoo.com](mailto:joe.coto@yahoo.com)

# Joe Coto

## Experience

- |             |   |
|-------------|---|
| 2004 - 2010 | <b>Assemblymember</b><br>California State Legislature<br>State Capitol<br>Sacramento, CA<br>Served as Chair of the Insurance Committee and the<br>Government Organization Committee |
| 1989 - 2003 | <b>Superintendent of Schools</b><br>East Side Union High School District<br>830 North Capitol Avenue<br>San Jose, CA 95133  |
| 1985 - 1988 | <b>Superintendent of Schools</b><br>Oakland Unified School District<br>1025 Second Avenue<br>Oakland, CA 94605  |
| 1984 - 1985 | <b>Director of Department of State and Federal Programs</b><br>Oakland Unified School District  |
| 1980 - 1984 | <b>Assistant Director</b><br>Arizona Department of Economic Security<br>Division of Employment and Rehabilitation<br>1300 West Washington<br>Phoenix, AZ 85007                      |
| 1979 - 1980 | <b>Administrator</b><br>Staff Development and Training<br>Arizona Department of Economic Security   |
| 1961 - 1979 | <b>Various Administrative Positions and Teacher</b><br>Oakland Unified School District  |

## Education

Doctorate Studies  
Columbia University  
New York

Masters in Management  
University of Phoenix  
Phoenix, Arizona

Administrative Credentials  
California State University  
Hayward, California

Education Studies  
California State University  
Los Angeles, California

Bachelors of Arts Degree  
California Western University  
San Diego, California

## Other Related Experience

**City Councilman**  
City of Oakland, CA

**Commissioner, Redevelopment Agency**  
City of Oakland, CA

## Major Awards

Superintendent of the Year by Association of California School  
Administrators

Administrative Leadership Award by California Library Association

Legislator of the Year by the California Association of Bilingual  
Educators

Education Advocate of the Year by the Santa Clara County Office of  
Education



LEADERSHIP ASSOCIATES

PROPOSAL TO CONDUCT A SUPERINTENDENT SEARCH

FOR

**San  
Dieguito**  
**Union High School District**

MAY 2016



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ITEM 3  
50-855 WASHINGTON ST. #C205  
LA QUINTA, CALIFORNIA 92253  
PHONE (760) 771-4277  
WWW.LEADERSHIPASSOCIATES.ORG

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KENT L. BECHLER + JAMES R. (JIM) BROWN + MARC ECKER + MICHAEL F. ESCALANTE + RICHARD FISCHER + SALLY FRAZIER + GWEN E. GROSS + DON IGLESIAS + PEGGY LYNCH + PHIL QUON + DENNIS M. SMITH + RICH THOME + DAVID J. VERDUGO

May 19, 2016

Ms. Beth Hergesheimer, President  
Board of Trustees  
San Dieguito Union High School District  
710 Encinitas Blvd.  
Encinitas, CA 92024

Dear President Hergesheimer and Members of the Board:

Leadership Associates is pleased to submit a proposal to partner with the San Dieguito Union High School District Board of Trustees 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. Our work includes partnering with Boards in several similar and/or nearby school districts such as Capistrano Unified, Rancho Santa Fe, Saddleback Valley, Cajon Valley Union, Anaheim Union High, and Santa Monica-Malibu Unified school districts.

We are an executive search firm that recruits candidates nationwide but 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 and community. Through our years of experience we have come to understand and respect the uniqueness of each board and district. While there are similarities among districts, we believe that each district has a unique culture that is important to respect and understand. There are many good superintendent candidates but only some will be the right match for San Dieguito Union High School District. Our job is to find those individuals who are that right match.

In considering the uniqueness of the San Dieguito Union High School District, Leadership Associates is very aware and respectful of the following characteristics and will bring you candidates who match your ideals and beliefs as a district. The candidates will understand that San Dieguito Union High School District is known for:

- *Great schools with great teachers and students*
- *Student learning and academic achievement is the primary focus*
- *Sound fiscal management*
- *Excellent facilities*
- *A history of stability and commitment to students*
- *An involved parent community with the schools & district*

Because there may be one or more internal candidates the Board would like to consider, we would recommend, doing a 'tiered' search which would be completed in phases, each phase having a set price. The first phase would be gathering all stakeholder input. If initial findings do not include the selection of a candidate after phase one, then, at the Board's direction, we would proceed on to a full search. Details and specifics of the proposed tiered search process can be found in our sample contract on page 17.

We would welcome the opportunity to partner with you 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 meet with staff and community groups and individuals to obtain their 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 candidates who will be an excellent fit as San Dieguito Union High School District Superintendent.

If our firm is selected, Dr. David Verdugo, Dr. Marc Ecker, and Dr. Kent Bechler will be the lead consultants and actively involved with this search. In addition, to ensure the widest possible pool of qualified candidates, all partners who are located in various geographical regions of the state will actively support and assist with the search. Profiles of each partner are provided in the Qualification Statement of our proposal. We will use our extensive leadership network at the state and national level to help find the best candidates for this exciting, challenging, and rewarding position.

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

Respectfully,



David L. Verdugo, Ph.D



Marc A. Ecker, Ph.D



Kent. L. Bechler, Ph.D

## EXECUTIVE SUMMARY

### **SAN DIEGUITO UNION HIGH SCHOOL DISTRICT SUPERINTENDENT SEARCH PROPOSAL 2016**

Occasionally it is important to hit the reset button – to examine what is working well and what could be done better. Leadership Associates, a California executive search firm with a national reach, offers such an opportunity to the San Dieguito Union High School District Board of Trustees for the hiring of its new superintendent.

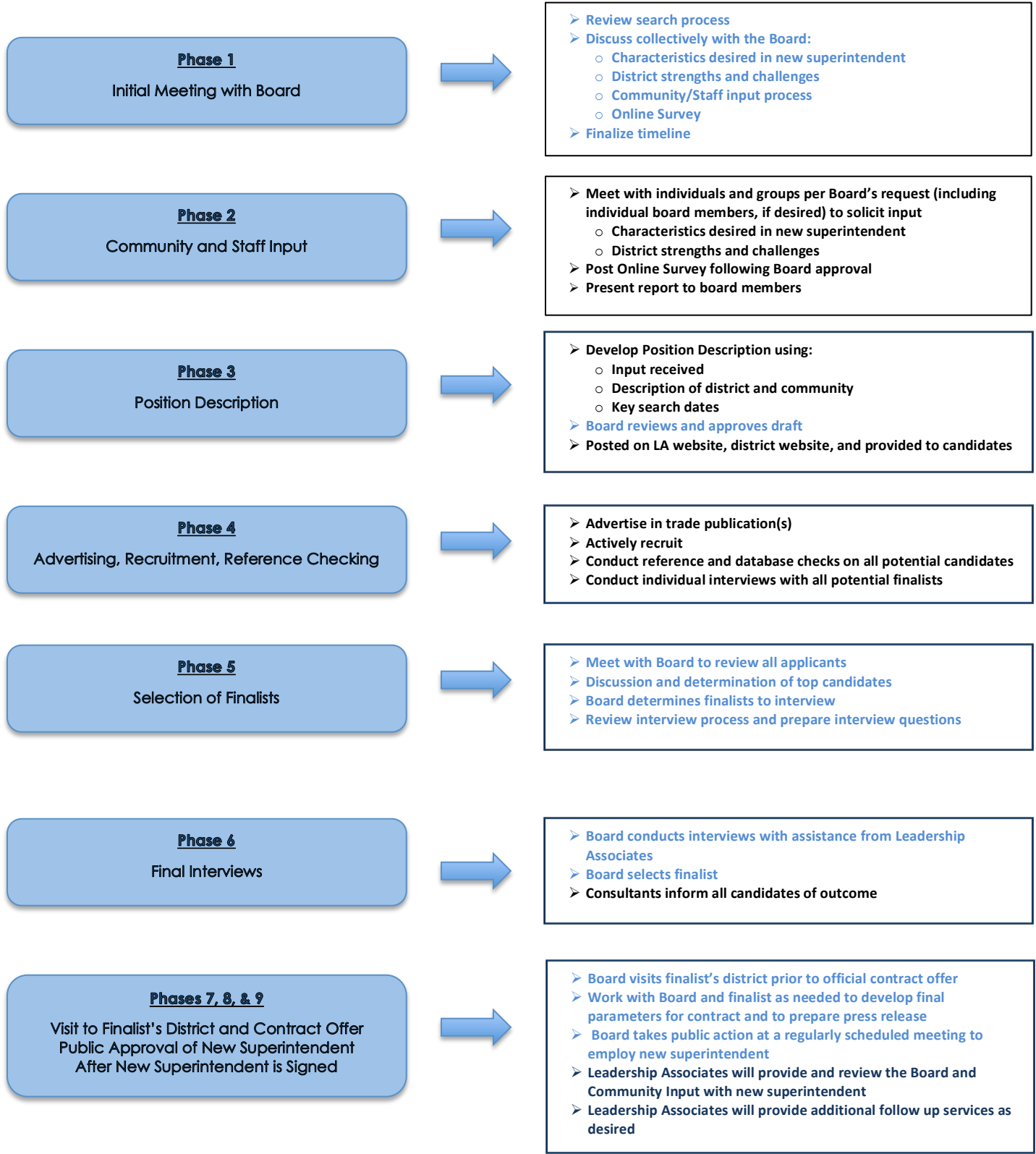
Leadership Associates specializes in helping California School Boards find new superintendents. We have done so since 1996 and have assisted with more superintendent searches than any search firm working in California. Our success is based on the following key factors:

1. We view each district as unique and therefore work as partners with the Board to develop a customized approach that the Board may use to select its new superintendent.
2. Through more than 350 searches in California we have developed processes that lead to the successful hiring of superintendents, and other education executives, who meet the profile developed by the Board. These processes include engaging key stakeholders, conducting extensive recruiting and thorough reference checking, and working with the Board throughout the interview and contract approval processes.
3. Our partners are all former superintendents with successful leadership experiences in a variety of districts and in state and national organizations. We know the work. And we know who will do it well.
4. We understand and respect the factors that contribute to a highly effective governance team. We are committed to helping Board members work collaboratively with each other throughout the various stages of the selection process. Done well, a search will always strengthen the work of the Board and pave the way for a successful superintendent.
5. We bring the Board highly qualified candidates. In some respects our job is to make your ultimate decision a difficult one. We are proud of the high quality leaders we have been able to bring forward for Board consideration.
6. Our belief is that in order for superintendents to be successful they must have successful leadership experience leading and managing complex organizations. They should know what excellence in curriculum and instruction looks like and be deeply committed to equity. Their behavior must be of the highest integrity and reflect ethical values in their relationships with students, staff, community, and the Board. They must support powerful teaching and learning, build leadership capacity, and strengthen systems and processes that support high levels of achievement for all students
7. We will always provide our best recommendations to the Board including those related to the hiring of specific candidates and the importance of maintaining a high degree of confidentiality so that the best possible candidates come forward.

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



# LEADERSHIP ASSOCIATES SUPERINTENDENT SEARCH PROCESS



## QUALIFICATION STATEMENT

### SAN DIEGUITO UNION HIGH SCHOOL DISTRICT SUPERINTENDENT SEARCH PROPOSAL 2016

#### 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 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.

**BEST PRACTICES FOR SELECTING A SUPERINTENDENT**

Superintendent transitions provide opportunities for organizational growth and development. With the increasing challenges and needs faced by children in school districts, the selection of a new superintendent is the most important decision a school board will make. This decision will have an immediate and lasting impact on student achievement, school climate and culture, student attitudes, teacher morale, parent expectations and community vitality. Perceptions of teaching and learning have changed during the last ten years and with that have come a change in expectations for school leaders.

Best practices for the selection of a new superintendent include:

<u>BEST PRACTICES</u>	<u>LEADERSHIP ASSOCIATES</u>
• Determine and clarify needs of the organization	✓
• Select a qualified search firm	✓
• Develop search protocols	✓
• Solicit meaningful engagement, input and feedback from all stakeholders	✓
• Use relevant data in developing the position description	✓
• Develop search transition agreements	✓
• Communicate superintendent search updates	✓
• Strategic recruiting and advertising	✓
• Thoughtful review of candidates	✓
• Rigorous interview process	✓
• Select the final candidate	✓

- ✓ **Determine and Clarify Needs of the Organization** – School districts, employees and communities should pay close attention to the organizational needs of the district, students and employees prior to hiring a new superintendent. These should be well understood at the beginning of the search process and reflected in the Position Description. Leadership Associates will assist the Board in this process.
- ✓ **Selection of a Qualified Search Firm** – This includes preparation of a Request for Proposal (RFP) which provides background on the District, lists questions to which the firm should respond and indicates the criteria that will be used to select a firm. Boards should seek references and background information on firms before making a final decision. Interviews with search firms should have ample time allotted for Board questions and Search Firm responses. Leadership Associates encourages Boards to contact references and use the Internet and other sources to obtain background information on the work of all interested search firms.
- ✓ **Develop Search Protocols** – The Board and Search Firm should agree on protocols to guide the search and any potential issues related to contract parameters.

- ✓ **Solicit Meaningful Engagement, Input and Feedback From All Stakeholders** – An extensive process for stakeholder engagement is critical before the hiring process begins. This ensures accurate data, buy-in and support for both the process and the final candidate. Multiple opportunities should be provided for people to participate.
- ✓ **Use Relevant Data in Developing the Position Description** – This is a key document because it informs the recruiting, reference checking, and interview processes. It should include the information identified and collected from the District database as well as the input received from the various District focus groups on qualities and characteristics desired, including a description of the District and community. It is critical that the selected candidate is hired for the district he/she will lead and not just the position.
- ✓ **Develop Search Transition Agreements** – Prior to the selection of the superintendent there should be a discussion of the leadership transition process, the roles and responsibilities for the next superintendent, and District and Superintendent goals for the coming year.
- ✓ **Communicate Superintendent Search Updates** – Opportunities for regular Board and community updates are critical to both the process and the calibrating of the search criteria as needed.
- ✓ **Strategic Recruiting and Advertising** – Utilizing and tapping into key professional educational networks, outside organizations, business leaders, labor groups, and media outlets are critical in identifying the “match” of candidates for the next superintendent.
- ✓ **Thoughtful Review of Candidates** – The application process provides an initial screening of qualifications; however, an in-depth confidential review of each candidate is critical as a predictor of future performance and success. Reference checking should include people not listed by the candidates. Checking databases is also essential as well as background checks for the finalists.
- ✓ **Rigorous Interview Process** – Leadership Associates remains with the Board during the entire interview process. We help the Board develop questions which are linked to the position description and are carefully analyzed and discussed prior to the interview. Additionally, each question response should be independently rated to assist in the review of candidate performance. All interviewees should be asked a similar set of questions in the first round. The second round with finalists is more informal.
- ✓ Search committee members commonly make decisions about candidates within the first three minutes of an interview and base these decisions upon personal attraction, candidate reputation or candidate connections to a Board member. Well coached candidates know this. In hiring, it is important to consider these initial reactions but remain focused on the goals and criteria for the hire. The hiring process should be methodical in surfacing these initial reactions and helping Board members make a well-informed decision and to resist the quick and emotional decision.
- ✓ **Selecting the Final Candidate** – The Search Firm should provide protocols to assist the Board with its deliberations about the final candidates and be prepared to assist in arranging a site visit if desired. Representatives of the firm should be available to facilitate the deliberation process.

## 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 superintendents 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 THE PROPOSED PERSONNEL

### LEAD CONSULTANTS

#### 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.

**Marc A. Ecker, Ph.D - Partner**

Marc served as Superintendent of the Fountain Valley School District for 18 ½ years before retiring in December 2014. He served as Chair of the Orange County Special Education Alliance and is a past president of the Orange County Superintendent's Organization. Marc is the immediate past President of the Association of California School Administrators (ACSA). He serves as a consultant at ACSA Academies for principals, chief business officials and superintendents speaking on school finance and school board effectiveness. Marc 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 served on the State Public Schools Accountability Act Advisory Committee and two terms on the Financial Crisis Management Assistance Team Advisory Board. Marc serves as a member of the Board for the California League of Schools and served as president of the Association of Middle Level Education. Marc serves on the executive board for the Educational Leadership Doctoral program at California State University, Fullerton and teaches school finance and organizational development. Marc received his Bachelor's Degree from UCLA, his Master's Degree from California State University, Fullerton and his Doctorate from Alliant University.

**Kent L. Bechler, Ph.D - Lead Partner, Leadership & Organizational Development**

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

**SEARCH SUPPORT CONSULTANTS****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.

**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 Superintendent's Academy and presenter and trainer for California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendent's 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.

#### **Gwen E. Gross, Ph.D - Partner**

Gwen served as Superintendent of Irvine Unified School District until her retirement in June 2011. She also served as Superintendent of the Manhattan Beach Unified, Beverly Hills Unified, Ojai Unified and Hermosa Beach City School District. She received her Bachelor's Degree from the University of Wisconsin, Master's Degree in Special Education and Administration, and her Ph.D. in Educational Leadership from Kent State University. Gwen received a U.S. Office of Education National Inservice Grant focused on building capacity for special education leaders throughout the country. Gwen taught in Pepperdine University's Graduate School of Education and was selected in 2005 as the "Superintendent of the Year." She has served as the President of the National Suburban School Superintendents, Chair of the ACSA Superintendents Symposium, President of the Southern California Superintendent's group and a member of the CSBA Legal Alliance and the Superintendents' Advisory Committee. Gwen has co-authored three books focused on the superintendency, effective partnerships with boards of education, and capacity building for administrators.

#### **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.

### **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 - Lead Partner, Executive Searches**

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 numerous executive searches; serves as Director, Professional Learning in the Mobile Technology Learning Center (MTLC), a research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego; and is an Executive Coach for Pivot Learning Partners in Los Angeles and San Diego Counties. 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. He has received 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 distinction in San Diego County and the region serving as Chairperson of the Superintendents' Technology Advisory Committee and leading the expansion of technology centers and efforts of school districts throughout the region.

**SUGGESTED TIMELINE\***

**SAN DIEGUITO UNION HIGH SCHOOL DISTRICT  
SUPERINTENDENT SEARCH PROPOSAL 2016**

<u>DATE</u>	<u>EVENT</u>
May 20, 2016	Board interviews and selects search firm and announces tentative timeline and procedures for the selection of the new superintendent.
May-June 2016	Board meets with consultants to identify key qualities and characteristics desired in the new superintendent, finalizes search timelines and determines key stakeholder groups and individuals for input meetings.
June 2016	Consultants meet with staff, community and civic leaders designated by Board. Online survey is active and ongoing throughout month.
June 2016 <b>(Tier I Completed)</b>	Consultants present to the Board the summary report and findings from all stakeholders on key skills, attributes and qualities desired in the new superintendent. The Board determines if the process proceeds to next phase.
July 2016	Ad appears in ACSA EdCal and national publications. Active recruitment. Consultants begin identifying candidates.
August 1, 2016 5:00 p.m.	<b>Deadline for applications.</b>
August 2016	Consultants complete comprehensive reference and background checks on applicants.
August 2016	Board meets with consultants, reviews applications and selects finalists to be interviewed.
August 2016	Board interviews finalists.
August 2016	Board visits community of leading candidate Board announces finalist (optional).
September 2016 <b>(Tier II) Completed)</b>	Board approval of Superintendent's contract at a regularly scheduled board meeting.
As Mutually Agreed Upon	New Superintendent begins.

\* Timeline is flexible based on Board direction.

**PRICE PROPOSAL**

**SAN DIEGUITO UNION HIGH SCHOOL DISTRICT  
SUPERINTENDENT SEARCH PROPOSAL 2016**

**TOTAL FEE TO CONDUCT FULL SEARCH FOR NEW SUPERINTENDENT: \$ 28,500\***

**\*Phase One: \$ 9,500**

**\*Phase Two (optional): \$19,000**

This fee includes:

Phase One and Two:

- All expenses incurred by consultants
- All meetings with the Board
- Gathering of community and staff input and providing Board with a written report
- Assisting in the development of interview questions
- Acting as an advisor to the Board of Education

Phase Two:

- 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
- Coordination of logistics of the search:
  - scheduling appointments
  - notification of unsuccessful candidates
  - scheduling community visit
- Assisting the new superintendent and Board through transition and the first year
- Guarantee that should the new superintendent leave within the first year, Leadership Associates will conduct a new search at no cost, except for expenses, provided the Board majority remains the same



## SAMPLE CONTRACT

**LEADERSHIP ASSOCIATES**  
50-855 Washington Street #C-205  
La Quinta, CA 92253  
Phone (760) 771-4277

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### AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **May 2016** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **SAN DIEGUITO UNION HIGH 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-EIGHT THOUSAND, FIVE HUNDRED DOLLARS (\$28,500)** for services provided. Payment is to take place in two increments: **(1) \$9,500 (33.3%)** upon completion of community and staff input, and **(2), \$19,000 (66.6%)** upon interview of final candidates. 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 parties agree that:

1. Upon completion of the meetings with the community and staff to gather input regarding desired qualities and characteristics of the new superintendent, the consultants will meet with the Board to summarize the comments received. The Board will then determine whether to proceed with a full search or modify the process as needed. If the Board decides not to continue with the search, then the search will be terminated and Leadership Associates will charge the District 33.3%, (\$9,500) of the original contract amount.
2. If the Board continues with the search, Leadership Associates will proceed with the full search process as delineated in the search proposal and will charge the District the final 66.6% (\$19,000) of the original contract amount.

The Contractor is to perform the above services beginning May 2016.

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:  
SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

By \_\_\_\_\_

Name David Verdugo, Ph.D

Date May 2016

By \_\_\_\_\_

Name \_\_\_\_\_

Date \_\_\_\_\_

SAMPLE

# REFERENCES

## **SAN DIEGUITO UNION HIGH SCHOOL DISTRICT SUPERINTENDENT SEARCH PROPOSAL 2016**

1. District: PALM SPRINGS UNIFIED SCHOOL DISTRICT  
Contract Service: Superintendent Search  
Contact: Shari Stewart  
Title: President, Board of Trustees  
Phone: (760) 409-6480 (cell)  
Year: 2016  
Consultants: Kent Bechler and Dennis Smith
  
2. District: RIVERSIDE UNIFIED SCHOOL DISTRICT  
Contract Service: Superintendent Search  
Contact: Tom Hunt  
Title: Board President  
Phone: [thunt@rusd.k12.ca.us](mailto:thunt@rusd.k12.ca.us) or 951-788-7135, ext. 80417  
Year: 2014  
Consultants: Rich Thome, Gwen Gross and Kent Bechler
  
3. District: CARMEL UNIFIED SCHOOL DISTRICT  
Contract Service: Superintendent Search  
Contact: Rita Patel  
Title: Board President  
Phone: (831) 624-1546 ext. 2021 (Supt. Office)  
Year: 2015  
Consultants: Don Iglesias, Sally Frazier, Peggy Lynch
  
4. District: NOVATO UNIFIED SCHOOL DISTRICT  
Contract Service: Superintendent Search  
Contact: Debbie Butler  
Title: Board President  
Phone: (415) 806-3362  
Year: 2014  
Consultants: Phil Quon and Mike Escalante
  
5. District: CAJON VALLEY UNION SCHOOL DISTRICT  
Contract Service: Superintendent Search  
Contact: Tamara Otero  
Title: Board President at time of search  
Phone: (619) 244-8138 (cell)  
Year: 2013  
Consultants: Rich Thome and Dennis Smith



# LEADERSHIP ASSOCIATES SEARCHES

**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-Current)**

<u>District</u>	<u>County</u>	<u>ADA</u>
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
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
Paramount USD	Los Angeles	15,681





## ITEM 3

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
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
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
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
Cypress School District	Orange	4,000
Eureka City	Humboldt	3,884
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
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
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

## COMMENTS FROM BOARD MEMBERS

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

"I have the utmost confidence that (the new superintendent) will provide our district with the leadership needed to continue our mission of academic achievement for each of our students. You knew that she would be the right fit for our district and you were "right on."

I can't thank (Leadership Associates) enough for your guidance throughout the whole process. You did a fabulous job working with the Board in providing us with the leadership and direction necessary to hire the best possible Superintendent for our district. I respect (Leadership Associates) so much and appreciate your professionalism." *Palm Springs USD*

"In follow-up to the (district's) superintendent search I wish to express my ultimate appreciation for the absolute fine job. I am confident you brought to the district a fine group of candidates. I am even more confident your guidance and support led the board to the selection of the best fit for our district." *Bakersfield City 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." *Carmel USD*

"Once selected as the superintendent search firm by the board, we were immediately contacted to begin the process following the step-by-step process submitted with the proposal. I was especially pleased that all of the steps were followed and that there were no "surprises" throughout the search that could have potentially caused uneasiness by the board." *Franklin-McKinley SD*

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

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

"(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)". *University Preparatory School*

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

## ITEM 3

"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." *Irvine 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." *Placentia-Yorba Linda USD*

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

"We are extremely pleased with our choice, but feel that the other candidates we interviewed would have been excellent as well. You actually made our lives more difficult by providing such great candidates from which to choose." *Santa Ynez Valley UHSD*

"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 firing points for our new superintendent." *Walnut Valley USD*

"(Leadership Associates) had regular communications with the board and dependably delivered on each step in our timeline. Trust in the process was a result of (Leadership Associates) extensive experience and in the actions and care....while respecting the role of trustees as the decision makers of the district." *Standard 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." *Fullerton 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." *Whittier City School District*

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

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

*A Proposal Prepared for*

***San Dieguito Union  
High School District***  
***Encinitas, California***

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted in collaboration with*



*by*

**MCPHERSON**  **JACOBSON, LLC**

**Executive Recruitment & Development**

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May 16, 2016

Board of Trustees  
San Dieguito Union High School District  
710 Encinitas Blvd.  
Encinitas, California 9202

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 San Dieguito Union High 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](mailto: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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05/16



## *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.

We have an **over 80 percent retention rate** for our placements in the past five years, **60 percent** are in place in the past ten years, and **almost half** of our placements are still in the position for which we placed them in the past 15 years. These statistics speak for our ability to create a good match.

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## *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 600 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**

Organizations using the McPherson & Jacobson protocol have enjoyed sustainability of leadership.

Over the last five years, **over eighty percent** of administrators are in the position for which they were hired. **Sixty 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.

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## ***Executive Summary***

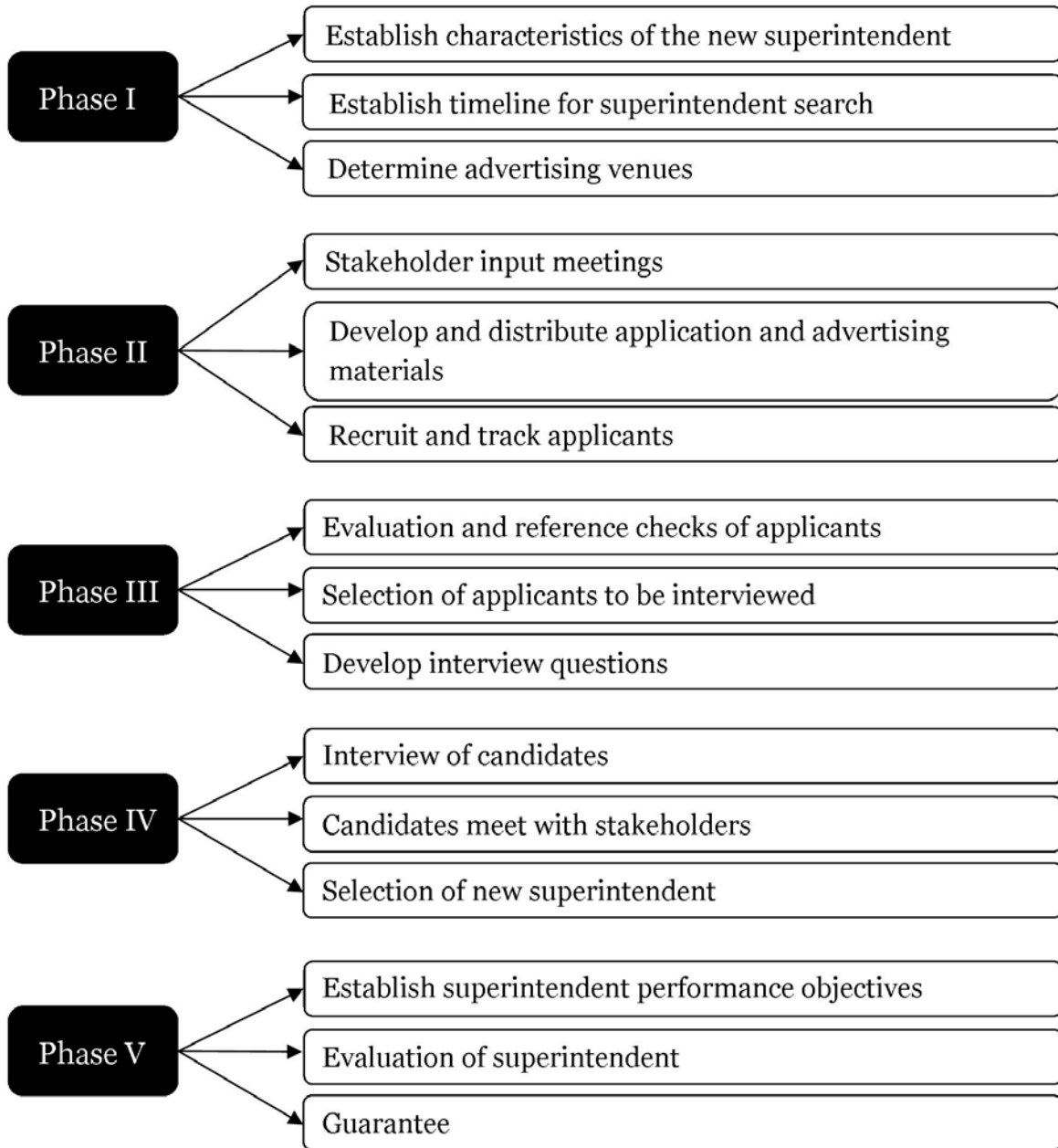
McPherson & Jacobson L.L.C. provides a comprehensive search process. Below are some of the highlights of our process:

- 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.***

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## *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.

✓ **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.

*"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*



## *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. For any unable to attend a stakeholder meeting, we provide an online version of the questions we ask the groups. 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.

✓ **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](http://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.

✓ **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.

✓ **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.

### *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.

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

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

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

✓ **Assist the board in 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.

✓ **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.

### *Phase IV*

In Phase IV McPherson & Jacobson's consultants will:

✓ **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.

✓ **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.

*“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 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.

*"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*

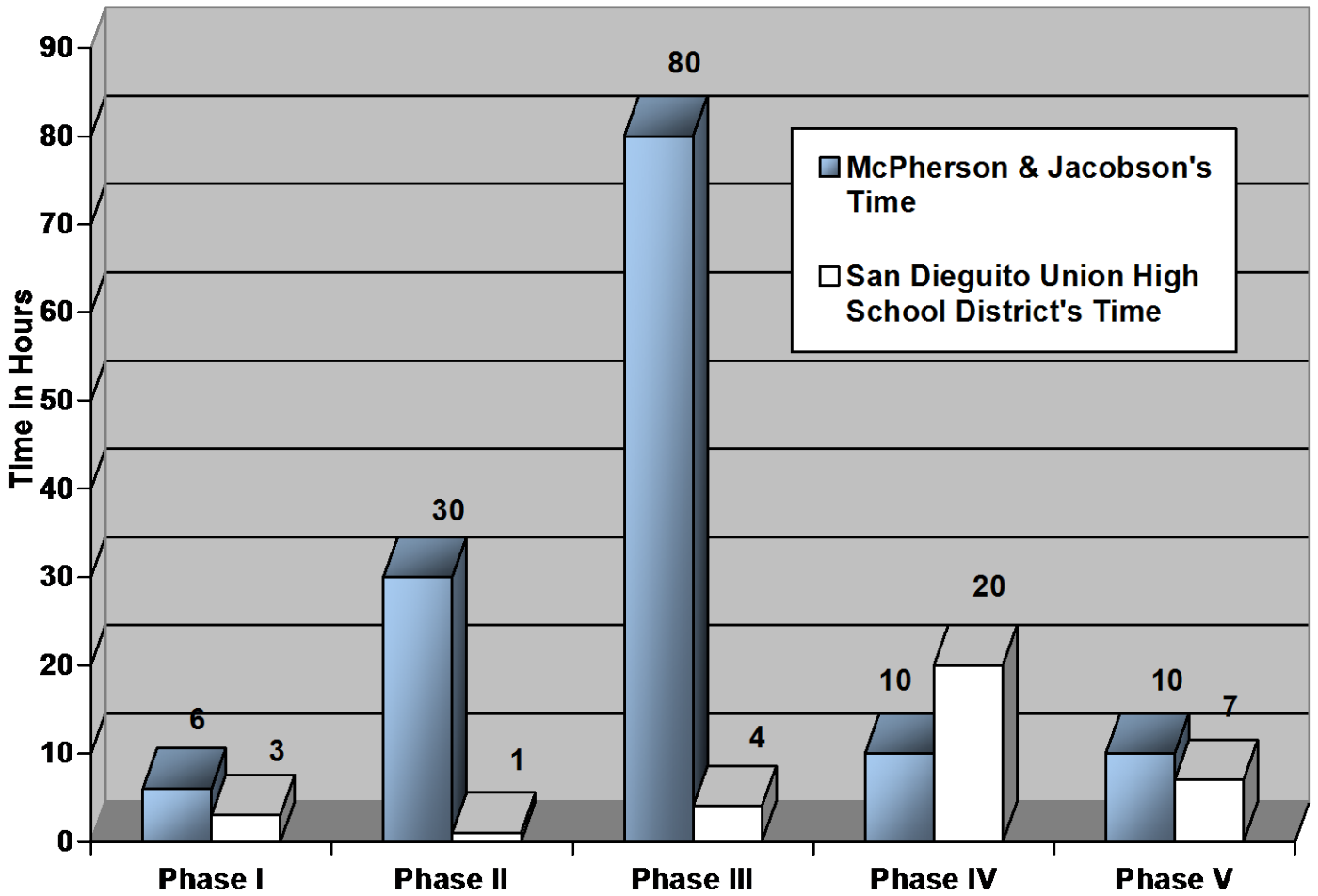
*"High level of professionalism accompanied by a personable and transparent consultant leading a very good process to a very good outcome."*

*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*

### *Comparison of Time Requirements for a Superintendent Search*



Based on past searches, the above graph represents board members' investment of time with the search process as compared to McPherson & Jacobson.

McPherson & Jacobson has designed a protocol that allows the board to concentrate on your most important responsibility, selecting the best-qualified leader for your district.



## *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

ITEM 3

## ***Responsibilities of San Dieguito Union High School District and McPherson & Jacobson, L.L.C.***

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

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

### San Dieguito Union High School District

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

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## ***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.



## *Consultants for Search*

### **Dennis D. Murray**

23878 Conestoga Avenue

Murrieta, California 92652

Phone: 951.677.6561

Cell: 951.830.6899

[dd.murray@verizon.net](mailto:dd.murray@verizon.net)

#### **Professional Employment History**

August 2014 to Present	Consultant, McPherson & Jacobson, L.L.C.
February 1, 2007 to Present	Owner, Code 4 Educational Consulting
July 1996 to January 31, 2007	Superintendent Perris Union High School District Perris, California 92570
June 1, 1989 to June 30, 1996	Superintendent Needles Unified School District Needles, California 92363
August 1981 to June 1996 (concurrent employment)	Coordinator-Needles Evening Division San Bernardino Valley College Extension Needles, California 92363
July 1988 to June 1989	Principal (multiple sites) Needles Unified School District -Chemehuevi Valley Elementary School -D Street Elementary School -Parker Dam Elementary School -Director of Categorical Programs
October 1981 to June 1988	Principal-Needles High School -Athletic Director -Director of Vocational Education/ROP
June 1980 to June 1983	Director of Special Services Needles Unified School District
September 1968 to June 1980	Special Education Classroom Teacher Needles Unified School District

#### **Educational Training**

University of California  
Irvine, California

California Administrative Certification (K -14)  
(Post-Master's)

University of Texas  
Austin, Texas

Administrative Certification Graduate Fellowship  
(Education Professions Development Act)  
(Post-Master's)

University of Central Oklahoma Edmond, Oklahoma	Graduate Fellowship---Master's Degree Program
University of Nevada Post- Las Vegas, Nevada	Bachelor's Coursework/ Credentialing
Northern Arizona University Flagstaff, Arizona	Bachelor of Science in Education (Special Education Senior Traineeship)

**Other Education-Related Experience**

Former Chairperson	Riverside County Special Education Local Planning Area (SELPA)
Board of Directors	EXCEED, Division of Valley Resource Center for Developmentally Disabled (Hemet/Sari Jacinto/Perris/Palm Springs)
Former Member	Perris Valley Chamber of Commerce Board of Directors
Emeritus Member	Association of California School Administrators
Emeritus Member	National School Board Association
Emeritus Board Member	National Center for Educational Research and Technology (NCERT)

**Educational Certification**

- California Administrative Services Credential (K-14)---Life Credential
- Standard Teaching Credential (K-14)---Life Credential
- Community College Supervisory Credential---Life Credential
- Educational Specialist Certification for Severely Disabled
- Educational Specialist Certification for Developmentally Disabled
- Arizona Superintendent Certification
- Arizona Special Education Certification

**Non-Education Certification**

- Police Officers Standards and Training (POST)---Level 1 Reserve Deputy (retired)
- San Bernardino County Sheriffs Department/SARC Certification/Certified Boating  
Officer (retired)

## **Lou Elizabeth Obermeyer, Ed. D.**

3351 Holly Oak Lane  
Escondido, CA 92027  
760-638-6556 cell  
[louobermeyer@gmail.com](mailto:louobermeyer@gmail.com)

### **PROFESSIONAL EXPERIENCE**

**Valley Center-Pauma Unified School District**  
Superintendent, January 2006 – June 2014 (Retired)

**Atwater Elementary School District**  
Superintendent, January 2003 – December 2005

**Perris Union High School District**  
Assistant Superintendent – Educational Services, 2000-2003

**Riverside County Office of Education**  
Regional Administrator – Educational Services, 1998 – 2000

**Temecula Valley Unified School District**  
Director of Curriculum and Instruction, 1997 – 1998

**Alvord Unified School District**  
Principal – Elementary (1,200 Students, Year-Round School), 1994 – 1997  
Assistant Principal – High School (2,000 Students), 1989 – 1994  
Teacher – Intermediate School, 1978 – 1989

**Adjunct Professor**  
University of La Verne, Doctorate Program, 2004-2009

### **EDUCATION**

**Edd** University of La Verne, Educational Management, 1996

**MA** California State University at San Bernardino, 1982  
Secondary Education

**BS** California Polytechnic State University at San Luis Obispo, 1977  
Home Economics

### **PROFESSIONAL DEVELOPMENT AND PRESENTATIONS**

ACSA Superintendent's Academy Presenter, Superintendent Evaluation,  
Contract and Board Relationships, 2012 - 2013

ACSA Women's Leadership Summit Presenter, Managing Difficult  
Conversations

WestEd Presentation at School District Turnarounds Conference, 2010

Professional Learning Communities Institute, 2004-2008

WestEd Evaluation English Learner Services and Results for Accountability and  
Instructional Improvement, 2005

ACSA Leading the Leaders 2003 – 2004

ACSA Superintendent's Academy, 2001 - 2002  
Pupil Services and Special Education symposium, 2002  
Walk-Through with Reflective Feedback for Higher Student Achievement  
Training, 2002

### **HONORS AND AWARDS**

ACSA California Superintendent of the Year, 2011  
ACSA Region 18 Superintendent of the Year, 2011  
Holtville High School Hall of Fame Inductee, 2011  
Soroptimist International of Atwater Women of Distinction Award, 2004  
Riverside County Office of Education, Team Award, 1998  
Principal of the Year, Alvord Unified School District, 1997  
Teacher of the Year, Loma Vista Intermediate School, 1979 and 1988

### **PROFESSIONAL AFFILIATIONS**

ACSA State Board Member, 2013-2014  
ACSA Region 18 Superintendent's Council, 2010 - 2014  
ACSA Annual Leadership Summit Chair 2013  
CIF State Governance Task Force, 2009 - 2012  
SDCOE FBC Investment Advisory Council, 2009 - 2011  
NISER SELPA Chair, 2008 – 2010  
CSBA Golden Bell Application Judge, 2004 - 2014  
ACSA Annual Superintendent's Symposium Chair, 2009  
ACSA Annual Superintendent's Symposium Planning Committee Member  
2005 – 2009  
ACSA Annual Superintendent's Symposium, New Superintendent Training  
Chair, 2006-2009  
ACSA Palomar President, 2006 – 2009  
ACSA Palomar Secretary, 2009 – 2014

### **COMMUNITY LEADERSHIP AND INVOLVEMENT**

Valley Center Rotary Club Former Member and New Generations Director  
Valley Center Chamber of Commerce Former Member

## ***Investment***

**The investment for conducting the superintendent search is \$17,500 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.

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## ***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

### **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

### **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

**Pleasanton Unified School District**

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

**Newcastle Elementary School District**

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

**Pollock Pines Elementary School District**

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

**Old Adobe Union School District**

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

**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

**Oxnard Union High School District**

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

**Sausalito Marin City School District**

200 Phillips Drive  
Marin City CA 94965  
School Phone: 415-332-3190  
Search Year: 2015/16  
Enrollment: 263

**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

**Winship-Robbins Elementary School District**

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

**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



## *California Consultants*

**Mrs. Janice Adams**  
Retired Superintendent  
Benicia, California

**Mr. Micah Ali**  
Board Member  
Compton, 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

**Ms. Anita Johnson**  
Executive Director  
National Center for Ed Research & Tech  
Laguna Niguel, California

**Dr. Steven Lowder**  
Retired Superintendent  
Stockton, California

**Mr. Dennis Murray**  
Retired Superintendent  
Murrieta, California

**Mr. Edward Nelson**  
Retired Superintendent  
Escondido, California

**Dr. Lou Obermeyer**  
Retired Superintendent  
Escondido, California

**Mr. Edward Velasquez**  
Retired Superintendent  
Lynwood, 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

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## ***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.

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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.***

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


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## *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	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	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
2010-2011	Bogalusa City Schools, LA	Ms. Louise Smith
2010-2011	Chapman USD 473, KS	Mrs. Lacey Sell
2010-2011	Danville Public Schools, AR	Mr. Miguel Hernandez
2010-2011	Jefferson County School District, Louisville, KY	Dr. Donna Hargens
2010-2011	Little Rock School District, AR	Dr. Morris Holmes
2010-2011	Ocosta School Dist., Westport, WA	Dr. Paula Akerlund
2010-2011	Orange County, Orlando, FL	Dr. Barbara Jenkins
2010-2011	Pine Bluff Public Schools, AR	Mr. Jerry Payne
2010-2011	Seaford School District, DE	Dr. Shawn Joseph
2010-2011	South Bend Comm. Schools, IN	Dr. Carole Schmidt
2010-2011	South Whidbey School District, Langley, WA	Dr. Josephine Moccia
2010-2011	Stuttgart Public Schools, AR	Dr. Melvin Bryant
2010-2011	Sumner County Educational Services Interlocal District #619, KS	Ms. Heather Bristor
2010-2011	Whitefish School District, MT	Ms. Kathryn Orozco



*A Tiered-Level Proposal Prepared for*

***San Dieguito Union  
High School District***  
***Encinitas, California***

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted in collaboration with*



*by*

**MCPHERSON**  **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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Fax: (402) 991-7168 ♦ Email: [mail@macnjake.com](mailto:mail@macnjake.com) ♦ Website: [www.macnjake.com](http://www.macnjake.com)

May 16, 2016

Board Trustees,  
San Dieguito Union High School District  
710 Encinitas Blvd.  
Encinitas, California 92024

Thank you for your request for information. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide San Dieguito Union High School District in ensuring your Superintendent search secures quality leadership for your district.

Our firm has designed a protocol allowing the district to concentrate on the most important segments: the interview and selection of the successful candidate. Our team of consultants, working in conjunction with the district and stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

With over 100 consultants across the United States, McPherson & Jacobson has been successfully conducting searches for public entities since 1991.

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](mailto:mail@macnjake.com)

We welcome the opportunity to meet with your district 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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05/16

## ***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.

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

### **Leading National Search Firm**

McPherson & Jacobson, L.L.C. has been conducting national executive searches since 1991. The firm has placed **over 600 administrators** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national executive 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**

Organizations using the McPherson & Jacobson protocol have enjoyed sustainability of leadership.

Over the last five years, **over eighty percent** of administrators are in the position for which they were hired. **Sixty 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.

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## ***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 selection committee 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 selection committee 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 district, 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 district selects their finalists.
- We continue to work with your school district until a Superintendent is hired and in place.
- The Transition Phase provides a continued commitment to work with your district 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.***

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## ***Phases of an Superintendent Search***

### *Preliminary Search Activities*

- ✓ **Using a group process with the selection committee, identify the most important characteristics of the future Superintendent.**

Using Nominal Group Technique, the consultants will assist the selection committee in identifying the most important characteristics the selection committee 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.

- ✓ **Identify the point of contact for the district.**

The district 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.

### *Solicit Stakeholder Input*

✓ **Identify appropriate stakeholder groups.**

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

✓ **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 district to provide stakeholder input into the selection process.**

The consultants will meet with the stakeholder groups identified by the district 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. For any unable to attend a stakeholder meeting, we provide an online version of the questions we ask the groups. The results of these meetings are summarized by the consultants and presented to the district. The district 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 district in choosing which groups it wishes to include.

### *Advertise Vacancy*

✓ **Determine, with the selection committee, appropriate advertising venues.**

The consultants will assist the selection committee 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.

✓ **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 selection criteria, 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 Superintendent Associations, as well as media venues selected by the district. Additionally, McPherson & Jacobson maintains an interactive website ([www.macnjake.com](http://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 selection committee.**

McPherson & Jacobson's staff will create an application form requiring applicants to describe their strengths and experiences relating to each criterion identified by the selection committee. 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.

### *Recruit Applicants*

✓ **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 selection committee 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 Superintendents conference, the National School Boards Association annual conference, and others such as the AASA Women's Leadership Conference.

✓ **Assist the district 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 district's consideration of compensation parameters.

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

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

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

### *Screen Applicants*

✓ **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 could 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.

✓ **Review candidates with the selection committee and assist selection committee members in determining which candidates they will interview.**

The consultants will present a complete list of applicants, who completed the application process, to the selection committee 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 selection committee members in identifying which applicants they wish to consider as candidates for interviews.

### *Coordinate Interview*

- ✓ **Assist the selection committee 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 selection committee. The selection committee members choose interview questions that reflect their criteria and priorities.

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

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

- ✓ **Assist the district in determining interview procedures.**

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

- ✓ **Coordinate interview and visitation procedures.**

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

Working with the district 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 selection committee.



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

We encourage districts 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 district 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.

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

Once a contract has been offered by the district and accepted, the consultants will call each of the other final candidates and thank them on behalf of the district 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 district can choose background checks for all of the finalists.

## *Transition*

### ✓ **Establish performance objectives for new Superintendent.**

Working with the district and new Superintendent, the consultant will assist in establishing two or three performance objectives the district 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, the district 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 district for formal approval and forwarded to McPherson & Jacobson's home office.

### ✓ **Provide a guarantee.**

If the district 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.

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## *Timeline*

The timeline for the search process is established when we meet with the district so we can address the unique needs of the district. However, the time from our first meeting with the district 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 district
  - Stakeholder group meetings are held
  - A summary of stakeholder input is presented to the selection committee
  
- 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 selection committee on all applicants who completed the process
  - Consultants present summary profiles of qualified candidates to the selection committee
  - The selection committee selects the candidates it wants to interview
  - McPherson & Jacobson notifies each applicant not selected for an interview
  
- Soon after the selection committee selects their candidates
  - Semi-finalist interviews are conducted (if chosen by the district)
  - The selection committee interviews its final candidates
  - The selection committee 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

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## ***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.



## *Consultants for Search*

### **Dennis D. Murray**

23878 Conestoga Avenue

Murrieta, California 92652

Phone: 951.677.6561

Cell: 951.830.6899

[dd.murrayl@verizon.net](mailto:dd.murrayl@verizon.net)

#### **Professional Employment History**

August 2014 to Present	Consultant, McPherson & Jacobson, L.L.C.
February 1, 2007 to Present	Owner, Code 4 Educational Consulting
July 1996 to January 31, 2007	Superintendent Perris Union High School District Perris, California 92570
June 1, 1989 to June 30, 1996	Superintendent Needles Unified School District Needles, California 92363
August 1981 to June 1996 (Concurrent employment)	Coordinator-Needles Evening Division San Bernardino Valley College Extension Needles, California 92363
July 1988 to June 1989	Principal (multiple sites) Needles Unified School District -Chemehuevi Valley Elementary School -D Street Elementary School -Parker Dam Elementary School -Director of Categorical Programs
October 1981 to June 1988	Principal-Needles High School -Athletic Director -Director of Vocational Education/ROP
June 1980 to June 1983	Director of Special Services Needles Unified School District
September 1968 to June 1980	Special Education Classroom Teacher Needles Unified School District

#### **Educational Training**

University of California  
Irvine, California

California Administrative Certification (K -14)  
(Post-Master's)

University of Texas  
Austin, Texas

Administrative Certification Graduate Fellowship  
(Education Professions Development Act)  
(Post-Master's)

University of Central Oklahoma Edmond, Oklahoma	Graduate Fellowship---Master's Degree Program
University of Nevada Post- Las Vegas, Nevada	Bachelor's Coursework/ Credentialing
Northern Arizona University Flagstaff, Arizona	Bachelor of Science in Education (Special Education Senior Traineeship)

**Other Education-Related Experience**

Former Chairperson	Riverside County Special Education Local Planning Area (SELPA)
Board of Directors	EXCEED, Division of Valley Resource Center For Developmentally Disabled (Hemet/Sari Jacinto/Perris/Palm Springs)
Former Member	Perris Valley Chamber of Commerce Board of Directors
Emeritus Member	Association of California School Administrators
Emeritus Member	National School Board Association
Emeritus Board Member	National Center for Educational Research and Technology (NCERT)

**Educational Certification**

California Administrative Services Credential (K-14) ---Life Credential  
 Standard Teaching Credential (K-14) ---Life Credential  
 Community College Supervisory Credential---Life Credential  
 Educational Specialist Certification for Severely Disabled  
 Educational Specialist Certification for Developmentally Disabled  
 Arizona Superintendent Certification  
 Arizona Special Education Certification

**Non-Education Certification**

Police Officers Standards and Training (POST) ---Level1 Reserve Deputy (retired)  
 San Bernardino County Sheriff's Department/SARC Certification/Certified Boating  
 Officer (retired)

## **Lou Elizabeth Obermeyer, Ed. D.**

3351 Holly Oak Lane  
Escondido, CA 92027  
760-638-6556 cell  
[louobermeyer@gmail.com](mailto:louobermeyer@gmail.com)

### **PROFESSIONAL EXPERIENCE**

**Valley Center-Pauma Unified School District**  
Superintendent, January 2006 – June 2014 (Retired)

**Atwater Elementary School District**  
Superintendent, January 2003 – December 2005

**Perris Union High School District**  
Assistant Superintendent – Educational Services, 2000-2003

**Riverside County Office of Education**  
Regional Administrator – Educational Services, 1998 – 2000

**Temecula Valley Unified School District**  
Director of Curriculum and Instruction, 1997 – 1998

**Alvord Unified School District**  
Principal – Elementary (1,200 Students, Year-Round School), 1994 – 1997  
Assistant Principal – High School (2,000 Students), 1989 – 1994  
Teacher – Intermediate School, 1978 – 1989

**Adjunct Professor**  
University of La Verne, Doctorate Program, 2004-2009

### **EDUCATION**

**Edd** University of La Verne, Educational Management, 1996

**MA** California State University at San Bernardino, 1982  
Secondary Education

**BS** California Polytechnic State University at San Luis Obispo, 1977  
Home Economics

### **PROFESSIONAL DEVELOPMENT AND PRESENTATIONS**

ACSA Superintendent's Academy Presenter, Superintendent Evaluation,  
Contract and Board Relationships, 2012 - 2013

ACSA Women's Leadership Summit Presenter, Managing Difficult  
Conversations

WestEd Presentation at School District Turnarounds Conference, 2010

Professional Learning Communities Institute, 2004-2008

WestEd Evaluation English Learner Services and Results for Accountability and  
Instructional Improvement, 2005

ACSA Leading the Leaders 2003 – 2004

ACSA Superintendent's Academy, 2001 - 2002  
Pupil Services and Special Education symposium, 2002  
Walk-Through with Reflective Feedback for Higher Student Achievement  
Training, 2002

### **HONORS AND AWARDS**

ACSA California Superintendent of the Year, 2011  
ACSA Region 18 Superintendent of the Year, 2011  
Holtville High School Hall of Fame Inductee, 2011  
Soroptimist International of Atwater Women of Distinction Award, 2004  
Riverside County Office of Education, Team Award, 1998  
Principal of the Year, Alvord Unified School District, 1997  
Teacher of the Year, Loma Vista Intermediate School, 1979 and 1988

### **PROFESSIONAL AFFILIATIONS**

ACSA State Board Member, 2013-2014  
ACSA Region 18 Superintendent's Council, 2010 - 2014  
ACSA Annual Leadership Summit Chair 2013  
CIF State Governance Task Force, 2009 - 2012  
SDCOE FBC Investment Advisory Council, 2009 - 2011  
NISER SELPA Chair, 2008 – 2010  
CSBA Golden Bell Application Judge, 2004 - 2014  
ACSA Annual Superintendent's Symposium Chair, 2009  
ACSA Annual Superintendent's Symposium Planning Committee Member  
2005 – 2009  
ACSA Annual Superintendent's Symposium, New Superintendent Training  
Chair, 2006-2009  
ACSA Palomar President, 2006 – 2009  
ACSA Palomar Secretary, 2009 – 2014

### **COMMUNITY LEADERSHIP AND INVOLVEMENT**

Valley Center Rotary Club Former Member and New Generations Director  
Valley Center Chamber of Commerce Former Member

## *Investment*

The investment for conducting an administrative search is dependent upon the service selected by the district.

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 district; 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. McPherson & Jacobson is willing to provide a maximum not to exceed amount, which includes the fee and expenses.

<b>Activity</b>	<b>Fee</b>
Preliminary Search Activities	<b>\$ 2,000</b>
Solicit Stakeholder Input*	<b>\$ 3,750</b>
Advertise Vacancy**	<b>\$ 750</b>
Recruit Applicants	<b>\$ 4,000</b>
Screen Applicants	<b>\$ 5,000</b>
Coordinate Interview	<b>\$ 1,000</b>
Transition	<b>\$ 1,000</b>
<b>TOTAL</b>	<b>\$17,900</b>
*Stakeholder meetings	Includes two (2) days of stakeholder input. If the district requests more than two (2) days of stakeholder input sessions, the expenses will increase and an additional fee of \$500 per day will be charged.
**Advertising expenses	Includes 30 days on American Association of School Administrators website (AASA.org) and 30 days on TopSchoolJobs.org, this amount will increase if the selection committee chooses additional advertising media.

**NOTE:**

- Interview expenses for the candidates are not included in the expenses listed above.
- There is an additional fee and expenses for the consultants to attend the interview sessions.

**Additional Services:**

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

- Assist the selection committee in revising and updating the Superintendent's job description.
- Assist the selection committee 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.

## ***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

### **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

### **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

**Pleasanton Unified School District**

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

**Newcastle Elementary School District**

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

**Pollock Pines Elementary School District**

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

**Old Adobe Union School District**

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

**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

**Oxnard Union High School District**

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

**Sausalito Marin City School District**

200 Phillips Drive  
Marin City CA 94965  
School Phone: 415-332-3190  
Search Year: 2015/16  
Enrollment: 263

**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

**Winship-Robbins Elementary School District**

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

**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



## *California Consultants*

**Mrs. Janice Adams**  
Retired Superintendent  
Benicia, California

**Mr. Micah Ali**  
Board Member  
Compton, 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

**Ms. Anita Johnson**  
Executive Director  
National Center for Ed Research & Tech  
Laguna Niguel, California

**Dr. Steven Lowder**  
Retired Superintendent  
Stockton, California

**Mr. Dennis Murray**  
Retired Superintendent  
Murrieta, California

**Mr. Edward Nelson**  
Retired Superintendent  
Escondido, California

**Dr. Lou Obermeyer**  
Retired Superintendent  
Escondido, California

**Mr. Edward Velasquez**  
Retired Superintendent  
Lynwood, 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

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## ***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.

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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.***

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


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## *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	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	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

## ITEM 3

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
2010-2011	Bogalusa City Schools, LA	Ms. Louise Smith
2010-2011	Chapman USD 473, KS	Mrs. Lacey Sell
2010-2011	Danville Public Schools, AR	Mr. Miguel Hernandez
2010-2011	Jefferson County School District, Louisville, KY	Dr. Donna Hargens
2010-2011	Little Rock School District, AR	Dr. Morris Holmes
2010-2011	Ocosta School Dist., Westport, WA	Dr. Paula Akerlund
2010-2011	Orange County, Orlando, FL	Dr. Barbara Jenkins
2010-2011	Pine Bluff Public Schools, AR	Mr. Jerry Payne
2010-2011	Seaford School District, DE	Dr. Shawn Joseph
2010-2011	South Bend Comm. Schools, IN	Dr. Carole Schmidt
2010-2011	South Whidbey School District, Langley, WA	Dr. Josephine Moccia
2010-2011	Stuttgart Public Schools, AR	Dr. Melvin Bryant
2010-2011	Sumner County Educational Services Interlocal District #619, KS	Ms. Heather Bristor
2010-2011	Whitefish School District, MT	Ms. Kathryn Orozco



# SUPERINTENDENT SEARCH PROPOSAL

## FOR

### SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

May 12, 2016

#### **Board of Trustees**

Beth Hergesheimer, President

Joyce Dalessandro, Vice-President

Amy Herman, Clerk

Maureen, "Mo" Muir, Trustee

John Salazar, Trustee



PRESENTED BY: THE COSCA GROUP

4751 MANGELS BLVD

FAIRFIELD, CA 94534

707-646-2846

tcgcorp@sbcglobal.net

[WWW.THECOSCAGROUP.COM](http://WWW.THECOSCAGROUP.COM)

Confidentiality, Inclusiveness, Transparency



## TCG Leadership Development Corporation

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## **TCG Leadership Development Corporation**

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May 16, 2016

San Dieguito Union High School District  
Beth Hergesheimer, Board of Education President  
710 Encinitas Blvd.  
Encinitas, CA 92024

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

Thank you for the opportunity to be considered as the firm to assist in the selection of your new superintendent. As you are keenly aware, the selection of a superintendent to lead your District is one of the most significant actions that you will take as a Board of Education. The Cosca Group is ready and eager to work with you in this important endeavor.

The Cosca Group represents twenty-eight principal members, one distinguished emeritus member, and six associate members reflecting a diversity of major educational leaders with experience in a range of districts from 1,500 to 57,000 California students. We believe that we are the only firm whose members provide such an extensive statewide recruitment base and national recruitment base, a vital element of any successful search process. Because of this extensive network of colleagues, our superintendent searches attract a great number of qualified applicants within the State and on the national level. Collectively, our individual members have engaged in dozens of searches throughout California. We are proud of the fact that the Cosca Group has been successful in making lasting matching relationships between superintendents and districts in the superintendent searches that we have conducted.

Ms. Pat Puleo and Mr. Jaime Castellanos will be the search consultants, if the Board selects the Cosca Group. As indicated in the attached information about them, you will notice that they have extensive experience with Boards as Superintendents, consultants working with Boards, and leaders of administrative organizations. Because of this experience, they are regarded as experts in the areas of Board/Superintendent relations and school district governance. It would be an honor to work with your district in finding the candidates who will continue to meet the district's philosophy that all students should have equal access to a quality education and to foster continuous improvement for all students.

A major aspect of our process includes the involvement of the various district stakeholders in determining the unique needs of the District. This outreach effort, in past searches, has been inclusive and truly representative of the unique nature of each community and is intended to build support for the Board, District, and new Superintendent. Based on that determination, The Cosca Group, because of its wide variety of expertise in all phases of school district leadership, will work with the Governing Board in the selection of a new Superintendent and in developing effective supportive working relationships designed to best meet the needs of students, employees and the community.

The Cosca Group believes that the selection of the new Superintendent is the most critical decision you will make. Selecting the right firm to assist you in the decision will be critical. What are the critical elements you should consider in selecting the firm?

- Longevity of placed superintendents *is over 91%*
- The fee is all inclusive
- Communicating with the Board throughout the process
- Our extensive network of partners throughout the State can provide for a wide breadth of qualified candidates
- We provide for one year of mentoring of the new superintendent at no extra cost.
- Involvement of all major stakeholders
- Use of online survey to gather input from all stakeholders

We look forward to the opportunity to present our proposal to you and your Board and then working with you in this most important endeavor. If you have any questions, please contact Ms. Puleo at (714) 318-1826 or Mr. Castellanos at (661) 510-0045. Thank you for your consideration.

Sincerely,



Frank A. Cosca, Jr., Ed.D.  
President  
The Cosca Group



Steve Goldstone, Ed.D.  
Chairman, Board of Directors  
The Cosca Group

# Overview of Proposed Search and Selection Process for Superintendent

*The following "tentative" process will be modified as a result of discussion with and preferences of the Governing Board:*

## **Preliminary Phase:**

- ❖ Meet with the Board to adjust/modify/approve the Search and Selection Process and the accompanying proposed timeline.

## **Phase I:**

- ❖ Meet with the Board and identify the District's strengths and needs/critical issues. Based on those strengths and needs/critical issues, identify the characteristics desired in the new Superintendent. The Board will also identify groups and individuals representing community members, students, parents, teachers, classified employees, administrators, etc. to provide input to TCG. Discuss strategies to engage communities of color, including non-English-proficient constituents in the process.
- ❖ Meet with the identified groups and individuals and receive input regarding the District's strengths and needs/critical issues. Based on that information, input will be received regarding the characteristics desired in the new Superintendent.
- ❖ Meet with the Board to examine the information obtained from group and individual meetings. The Board will reexamine and prioritize its own lists of strengths, needs/critical issues, and characteristics. Using the data, TCG will create a profile and criteria and submit an electronic brochure to the Board.
- ❖ Arrange and pay for advertisements to be published, for example, in the EdCal newspaper, CASBO, national publications and other publications of the Board's preference. TCG will disseminate recruitment materials and vacancy announcements and correspond with experts in the field for nominations of potential candidates. All thirty-five TCG principal and associate members will actively recruit candidates who best characterize the ideal candidates for the District.
- ❖ Provide a status report to the Board.

## **Phase II:**

- ❖ Maintain all applicant files and communicate with applicants regarding the status of their files.
- ❖ Continue to proactively identify and recruit outstanding candidates who have not applied.
- ❖ Screen all materials from all applicants. Extensive reference checks will be conducted through a process of telephone conversations, appraisal of materials, and preliminary references.
- ❖ Create a panel of experts in school district administration to identify the most qualified applicants. Material will be developed which will describe and assess the finalists.

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- ❖ TCG will provide a status report to the Board, which will include a summary of qualifications of each of the candidates and those recommended for interview. The Board will approve candidates selected for interviews.

**Phase III:**

- ❖ Schedule interviews, to be conducted in closed session, with the agreed upon finalists and the Governing Board.
- ❖ Schedule and assist with a second set of interviews of the top candidate(s).
- ❖ A closed session with the Governing Board will be scheduled and TCG will assist, if requested, in the identification and confirmation of the finalist.

**Phase IV:**

- ❖ If desired, a site visitation to the district of the top candidate will be arranged and conducted.
- ❖ In closed session, coordinate the actual selection of the successful candidate by the Governing Board.
- ❖ Assist the Board, as directed, to negotiate an employment contract based upon a current compensation study.
- ❖ If so desired, assist the Board in announcing the new Superintendent of Schools for the District.

**Phase V:**

During the following twelve months, TCG will:

- ❖ Provide ongoing, on-call, mentoring for twelve months from both retired and active superintendents to the newly selected superintendent.

**Phase VI: (Optional)**

- ❖ For an additional fee, The Cosca Group will be available to the Board and Superintendent for additional consultation service that could include goal setting, evaluations, Board-Superintendent relations, role and functions of the Superintendent and the Board, etc.

## TENTATIVE TIMELINE FOR RECRUITMENT AND SELECTION PROCESS

ACTIVITY	DESCRIPTION	TIME TO COMPLETE	ESTIMATED DATES
Phase I—Pre Recruitment	<ul style="list-style-type: none"> <li>Meet with Board to review, modify and approve recruitment/ selection process and to have Board members individually identify District strengths, issues and desired characteristics of Superintendent</li> </ul>	One week	TBD
Phase I—Pre Recruitment (cont.)	<ul style="list-style-type: none"> <li>TCG meets with employee and stakeholder groups identified by the Board to identify district strengths, issues and desired characteristics of Superintendent. A written report of these meetings will be presented to the Board</li> </ul>	Two weeks plus, if necessary	TBD
Phase I—Pre Recruitment (cont.)	<ul style="list-style-type: none"> <li>TCG prepares draft electronic brochure that includes a District profile, District strengths, issues and desired characteristics of Superintendent and application information and deadlines</li> </ul>	One week	TBD
Phase I—Pre Recruitment (cont.)	<ul style="list-style-type: none"> <li>TCG presents draft electronic brochure at Special Board meeting to the Board members</li> </ul>	TBD	
Phase I—Pre Recruitment (cont.)	<ul style="list-style-type: none"> <li>Board receives an electronic brochure and application deadline at regular Board meeting</li> </ul>	TBD	

ACTIVITY	DESCRIPTION	TIME TO COMPLETE	ESTIMATED DATES
Phase II—Recruitment by TCG	<ul style="list-style-type: none"> <li>• Electronic brochure distributed to California schools and to national organizations</li> <li>• Ads placed in EdCal, CASBO, national publications, etc.</li> <li>• TCG members actively recruit candidates</li> <li>• Continual status reports to Board</li> </ul>	Four plus weeks	TBD
Phase III—Selection of Applicants for Interviews	<ul style="list-style-type: none"> <li>• TCG screens all applicants</li> <li>• Initial reference checks conducted by TCG</li> <li>• Panel convened to identify most qualified candidates</li> <li>• Thorough reference checks completed on qualified candidates</li> <li>• TCG prepares summary of qualifications, background material, etc. for Board review</li> <li>• Board identifies candidates for interviews</li> </ul>	Two weeks	TBD
Phase III—Selection of Applicants for Interviews (cont.)	<ul style="list-style-type: none"> <li>• Board reviews all application materials and background information of applicants and our recommendations for interviews the Board selects candidates for interviews at Special Board meeting</li> <li>• TCG completes Compensation study of districts selected by the Board</li> </ul>	TBD	
Phase IV—The Interview Process	<ul style="list-style-type: none"> <li>• Interview dates and process selected by Board</li> <li>• TCG contacts and schedules interviews of Board selected candidates</li> <li>• TCG develops preliminary list of questions for Board review and approval</li> </ul>	TBD	



ACTIVITY	DESCRIPTION	TIME TO COMPLETE	ESTIMATED DATES
Phase IV—The Interview Process (cont.)	<ul style="list-style-type: none"> <li>• Board conducts initial interview of selected candidates in Closed Session</li> <li>• Board selects candidates for final interview</li> </ul>	TBD	
Phase V—Appointment of the Superintendent (cont.)	<ul style="list-style-type: none"> <li>• Board approves District Superintendent employment agreement at regular Board meeting</li> <li>• TCG assists with contract development with Board, candidate, and districts legal counsel</li> </ul>	TBD	
Phase VI—Post Appointment Services from TCG	<ul style="list-style-type: none"> <li>• On-going mentoring for 12 months for new Superintendent, as requested</li> </ul>	12 months	TBD

# **COST ANALYSIS**

## **San Dieguito Union High School District Full Superintendent Search 2016**

### **TOTAL FEE OF \$22,500 IS ALL INCLUSIVE AND INCLUDES ALL THE FOLLOWING:**

- All expenses of the consultants
- All meetings with community at all input sessions
- Provide Board with written report of all input sessions
- All meetings with the Board
- All clerical expenses
- Development of Electronic Brochure for the position
- All advertising in state and national sources
- Background checks of all final candidates
- Scheduling of all interviews, notifications to all candidates, and assistance with the community visit of the successful candidate
- Preparation of a list of interview questions for the Board to review and decide what questions you want to use
- Provide the Board with guidance throughout the process
- If a successful candidate is not appointed by the Board, TCG will lead another search at no additional fee
- If the appointed candidate is released within the first year of employment, TCG will conduct another search at no additional fee except for direct expenses
- Provide for one year of mentoring the new superintendent

# SUPERINTENDENT SEARCH

## IN-HOUSE CANDIDATES ONLY

As requested by the Board, the Cosca Group offers the option of an in-house search. The process, as described, for the full search would remain mostly intact. Below, you will see the lined-out activities that would not be part of the In-House search:

### **Phase I**

Develop with the Board, a list of the District's strengths/needs/critical issues. Identify characteristics desired in the new superintendent.

Conduct stakeholder focus groups.

Refinement of Board strengths/needs/characteristics priorities.

Create an electronic "Call for Applicants" and application packet, including a description of the priorities established by the Board.

~~Arrange for advertisements to be published.~~

Provide a status report to the Board.

### **Phase II**

Maintain all applicant files and communicate with the candidates regarding the status of their files

~~Identify and recruit candidates.~~

Screen all materials from all applicants and conduct reference checks.

\*Create a panel of experts to identify the most qualified applicants (as the candidates are all in-house, the Board may choose to interview all applicants).

\*Summarize the qualifications and make recommendations for interview to the Board

### **Phase III**

Schedule interviews.

\*Schedule and assist with finalist interviews (if necessary).

TCG will assist, if requested, in the identification and confirmation of the finalist.

## Phase IV

~~A site visitation will be arranged~~

Coordinate the actual selection of the successful candidate.

Assist the Board, as directed, to negotiate an employment contract based on a current compensation study completed.

Assist the Board in announcing the new Superintendent of Schools for the District.

## Phase V

Provide on going, on-call, mentoring for twelve months of the newly selected superintendent.

\*Clarification and/or adjustments to this entry may be made

### **TOTAL FEE OF \$ 19,000 IS ALL INCLUSIVE and includes:**

- All expenses of the consultants
- All meetings with community at all input sessions
- Provide Board with written report of all input sessions
- All meetings with the Board
- All clerical expenses
- Development of Electronic Brochure and application for the position
- ~~All advertising in state and national sources~~
- Background checks of all final candidates (if desired)
- Scheduling of all interviews, notifications to all candidates, and assistance with the community visit of the successful candidate
- Preparation of a list of interview questions for the Board to review and decide what questions you want to use
- Provide the Board with guidance throughout the process

ITEM 3

- If the appointed candidate is released within the first year of employment, TCG will conduct another search at no additional fee except for direct expenses (In-house, full search at an additional \$3,500)
- Provide for one year of mentoring the new superintendent

**Section III, item two of the contract** would be amended to reflect the inclusive fee of \$19,000.

The search team, with the Board approval, will make the necessary proposed timeline adjustments to accommodate the exclusion of the entries and develop the appropriate timeframe for the in-house search.

# THE COSCA GROUP PROFILE

## WHO WE ARE

The Cosca Group was founded in 2000 and has been involved in over 50 plus searches. We are composed of 28 partners, 2 emeritus and 6 associates who are located throughout key areas of the north, south and central areas of the state. While our focus is on Superintendents searches we have been involved in other cabinet and site level leadership searches.

Who is The Cosca Group:

- All of our partners and associates have strong networks both within the state and on the national level
- Many of our partners are bi-lingual in Spanish
- All our partners and associates have held leadership roles in Association of California School Administrators (President and Executive Director), California School Boards Association, American Association of School Administrators, California Association of School Business Officials and California Coalition for Adequate School Housing, California Small Schools Association, California Association of Latino Superintendents, and California Association of Bilingual Educators.
- Many of our partners and associates teach or have taught graduate courses in Educational Leadership, School Finance and other specialties within the field of school Administration.
- Three of our partners have been California Superintendents of the Year and moved on for National recognition.
- Many of our partners and associates have received awards from educational and civic organizations. One of our partners was recognized by ACSA with the prestigious "Marcus Foster " award.
- Due to our strong performance, Boards have selected The Cosca Group for subsequent searches.
- Partners have held leadership positions in the Western Association of Schools and Colleges and chaired visitations in California, Hawaii, Pacific Islands and Asia.
- Our partners successfully led geographically and culturally diverse school systems across California including small, suburban and urban school districts.

# COPY OF CONTRACT

**SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**

**And**

**The Cosca Group**

## **AGREEMENT**

THIS AGREEMENT made and entered into this    day of    , by **SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**, a political subdivision of the State of California (hereinafter "DISTRICT") and The Cosca Group, (hereinafter, "CONSULTANT").

### I.

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

### II.

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

### III.

1. CONSULTANT, upon notice to proceed from the DISTRICT, shall provide to the DISTRICT such special services and advice more particularly set forth in the Proposal, [pages 3-8](#) hereto, which is incorporated by reference herein. CONSULTANT and DISTRICT both agree to be bound by all of the terms and conditions set forth in said Exhibit "A".
2. In consideration of the foregoing, DISTRICT shall pay CONSULTANT A FEE NOT TO EXCEED \$22,500. CONSULTANT shall invoice DISTRICT in three installments as follows:
  - (1) [\\$7,500](#) at the time of the development and presentation of the profile.
  - (2) [\\$7,500](#) at the presentation of a slate of final candidates.
  - (3) [\\$7,500](#) at the appointment of the new superintendent.

In addition, if the DISTRICT chooses an upgraded brochure the CONSULTANT will bill the DISTRICT for the actual and necessary expenses of said brochure, to be invoiced separately.

Terms of payment shall be net 45 days.

3. CONSULTANT shall well and faithfully perform each and all of the obligations set forth in the Agreement. CONSULTANT shall at all times be deemed an independent contractor, and neither the CONSULTANT nor any of its employees shall be considered employees of the DISTRICT for any purpose.
4. At all times, CONSULTANT shall work in cooperation with, and pursuant to the direction of the Superintendent of the DISTRICT, or the Superintendent's designee.
5. The DISTRICT shall have the right to terminate this Agreement at any time upon fifteen (15) calendar days' prior written notice. Should the Agreement be terminated, the DISTRICT shall be responsible for payment related to all services provided by the CONSULTANT up to the point of termination.

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

FOR: San Dieguito Union High School District

Dated: By: \_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

FOR: THE COSCA GROUP

Dated: By: \_\_\_\_\_  
Frank A. Cosca  
President

Dated: By: \_\_\_\_\_  
Steve Goldstone  
Chairman, Board of Directors

P.O. Box 2162  
Oroville, CA 95965  
Phone: 530-990-8658

Federal I.D. Number: 33-0972414



# SEARCH CONSULTANT BIOGRAPHIES

## **Pat Puleo**

Pat Puleo has had a comprehensive career in education. She served as Director of Education Programs, University Extended Education, at California State University, Fullerton, for six years. As part of that responsibility, she led outreach efforts, on behalf of the university, in several districts throughout Southern California in the areas of district program development, evaluation, curriculum and instruction, grant evaluation, support to underperforming schools, and administrator mentoring. Prior to her tenure at CSUF, Pat was the Director of Education Services in the Fullerton School District, principal, and coordinator of special programs. She has distinguished herself throughout her career as evidenced by her being recognized as Administrator of the Year in Orange County during her tenure as principal and received the Outstanding Service to the University Award from the College of Human Development and Community Service, CSUF, in 2000. She has been working as a private consultant for ten years in district strategic planning, instruction, curriculum, evaluation, and mentoring throughout California.

## **Jaime Castellanos**

Jaime Castellanos has been an educator for more than 34 years. He received both his undergraduate and graduate degrees from Loyola University of Los Angeles. During his career, he has served as a middle and high school teacher, assistant principal, high school principal, assistant superintendent of secondary education, and as Superintendent of the William S. Hart Union High School District. His experience as an educator has encompassed serving in small rural school districts and large suburban districts ranging in size from 3,000 to over 24,000 students.

Mr. Castellanos has served as president of the ACSA South Coast Santa Barbara Chapter, treasurer of ACSA Region 13, and as a board member of the Boys and Girls Club of Santa Clarita. He has been honored by being selected as ACSA Region 15 Superintendent of the Year, is a Marcus Foster Memorial Award recipient, Golden Oaks PTA award, and the Latino Chamber of Commerce Educator award. He brings expertise and experience in the areas of curriculum and instruction, budgeting, school facilities and mentoring staff.

# REFERENCES



MALAGA COVE  
ADMINISTRATION  
CENTER

375 Via Almar  
Palos Verdes Estates  
California 90274-1277  
(310) 378-9966  
www.pvpusd.net

Donald B. Austin, Ed.D.  
Superintendent  
of Schools

Board of Education

Erin G. LaMonte  
President

Larry Vanden Bos  
Vice President

Malcolm S. Sharp  
Clerk

Anthony Collatos  
Member

Barbara Lucky  
Member

Department, Extensions  
and FAX Numbers

Superintendent, x 404  
(310) 378-0732 (FAX)

Business Services, x 418  
(310) 375-4140 (FAX)

Educational Services, x 163  
(310) 791-2919 (FAX)

Human Resources, x 417  
(310) 791-2948 (FAX)

Student Services, x 551  
(310) 378-1971 (FAX)

## Palos Verdes Peninsula Unified School District

September 29, 2014

Mr. Frank Cosca, President  
The Cosca Group  
475 Mangels Blvd.  
Fairfield, CA 94534

Dear Dr. Cosca and fellow Associates,

It is with pleasure that I write this letter of support for the consulting, search services, and close-at-hand and in depth advice by three of the Cosca Group consultants for our district this past nine months. Our school district has not conducted an external search for a new Superintendent in over twenty years and it was critical for the Board of Education to find the type of expertise and guidance that we would need to fulfill this utmost important task conferred to the elected body of a public school district.

Our Board opted to initially ask the Cosca Group to facilitate discussions amongst the five of us to determine the best course of action for our situation in late 2013. Based on these discussions about the pending retirement of our then superintendent and the vacancy of the top curriculum and instruction leader, the board agreed to initiate a Request For Proposal for firms to conduct multiple searches. The Cosca Group consultants were adamant that they be shown no inside advantage to our call for search firms and indeed were one of six firms that we screened and ultimately part of a group of three firms that we interviewed. It was clear to all of us that The Cosca Group was a good fit for our team.

Collectively Dr.'s Cosca, Goldstone, and Halvorsen brought over 60 plus years of superintendent experience that proved to be vital as we navigated our search. The Cosca Group has a well vetted process they have used for districts all over California and we followed their time lines and steps quite satisfactorily. It is when we got off the paved road and into some rough that we were so glad to have the benefit of all three experts to share their guidance and wisdom. As the Board President and chief navigator for the search, I valued their accessibility, professionalism, and expertise immensely.

As you meet and interview search firms, much of what you hear may sound identical. It is the small print or the promises from The Cosca Group that made the difference to us. Returning phone calls within minutes or at most hours, starting all over with the search when we asked them to do so, the follow-up and shadowing with our newly selected Superintendent are the differentiating factors between the professionals of The Cosca Group and other search firms. They cared as much about finding the right fit for our district as the five of us elected officials and we never doubted that for a second.

I am happy to share with you additional thoughts at any time.

Erin LaMonte  
Board President  
Personal mobile phone 310-213-8331



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# Palos Verdes Peninsula Unified School District

September 29, 2014

To Whom It May Concern,

I would like to share my experience with the Cosca Group and highly recommend their services. The Cosca Group and I have worked together on several occasions, and I have found them to be approachable, mentoring, experienced, and organized.

In 2006, as part of a nation-wide search for the principal position of Laguna Beach High School, I first met the Cosca Group. The circumstances leading to the vacancy were politically charged and the District was dealing with an engaged community with a great deal of anxiety. The Cosca Group found me in Riverside and guided me throughout the process, ultimately resulting in a highly-successful relationship with the Laguna Beach community and School District.

The Cosca Group followed my career and recently recruited me for the position of Superintendent of Schools for the Palos Verdes Peninsula Unified School District. This is arguably one of the most complex positions in California and requires a deep understanding of the community and stakeholders. Initially unsure of my desire to make such a life-changing move, the Cosca Group maintained consistent contact and clearly outlined the position. Once involved in the process, they were exceedingly assessable and willing to spend an enormous amount of time helping me to understand the desired attributes of the Board of Education.

I was impressed that the Cosca Group had detailed information about my career, including accomplishments and bumps in the road. There was no doubt that they did their homework and thoroughly vetted me as a candidate. I was also thankful that they recruited me due to my specific skill-set and believed I was a match for this position. While they had numerous searches over the past few years, they waited until a position was truly a match to contact me.

Since my selection as Superintendent, the contact has not ceased. In fact, I receive consistent calls to check on my progress, problem-solve, and to connect me with other successful peers. My experience with the Cosca Group has been nothing less than exceptional. It would be a pleasure to serve as a reference on the Cosca Group's behalf.

Sincerely,

Donald B. Austin  
Superintendent of Schools  
(949) 243-5580



## Fillmore Unified School District

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### Superintendent's Office

627 Sespe Avenue  
Fillmore, CA 93015  
Phone (805) 524- 6038  
Fax (805) 524-6060

November 18, 2014

TO WHOM IT MAY CONCERN:

It is with great pleasure that I write this letter of recommendation on behalf of the Fillmore Unified School District for The Cosca Group. Having had an interim superintendent for the past several years, our Board decided that we needed to begin our search for a permanent superintendent. We were determined to take our time and find the best candidate for our district.

After interviewing a number of well-known and respected search firms, one in particular stood out above the rest. We selected The Cosca Group because of the outstanding presentation given by their representatives, Dr. George Bloch and Mr. Kenneth Noonan. They both did an excellent job of explaining their selection process from beginning to end. Their resources were outstanding, and they answered all our questions and concerns to our satisfaction. We especially were impressed with the fact that they were bilingual. Thus, they would be able to communicate well with so many of our Hispanic population.

One of the best attributes of The Cosca Group was the manner in which they were able to meet with groups who were representatives of all our stakeholders. This was important to us because we wanted to get input from all groups in our district and in our community. Through many hours of meetings, gathering information, creating a brochure with our district's expectations and sorting through applications, The Cosca Group finally presented us with their top candidates. We interviewed these individuals and were amazed that we had such a high caliber pool of candidates to select from.

From the final two candidates interviewed, we selected Dr. Adrian E. Palazuelos. We have been extremely pleased with Dr. Palazuelos. In the short time he has been with us, he has proven to be the perfect fit for our district. We cannot say enough about The Cosca Group and how professional and organized they were throughout the entire selection process. Our district and community have nothing but the utmost respect and praise for the work they did for us. We highly recommend their services.

Sincerely,

A handwritten signature in blue ink that reads "Lucy Rangel".

Lucy Rangel  
President of the Board of Education  
Fillmore Unified School District

# WOODLAND JOINT UNIFIED SCHOOL DISTRICT

"Excellence for All"

**Board of Trustees**

Sam Blanco III, President  
Elaine Lytle, Vice President  
Cirenio Rodriguez, Clerk  
Julie Blacklock  
David Hartley  
Art Pimentel  
Tico Zendejas



**Board of Trustees**

435 Sixth Street  
Woodland, CA 95695  
Phone: (530) 406-3202  
Fax: (530) 662-6956

District Website: [www.wjUSD.org](http://www.wjUSD.org)

Dr. Maria Armstrong, Superintendent

---

September 4, 2014

To Whom It May Concern:

It is my pleasure to write a letter of recommendation on behalf of the Woodland Joint Unified School District (WJUSD) Board of Trustees for The Cosca Group. During the 2013-14 academic year we were anticipating the retirement of Dr. Debra LaVoi, Superintendent of our school district. The school board interviewed many great and respected recruiting firms. One of those firms was The Cosca Group, who had done a previous recruitment to bring in Dr. LaVoi six years ago to WJUSD. After many hours of interviews and discussions, the School Board decided to hire The Cosca Group.

Throughout the whole process it was definitely a pleasure working with both Steve Goldstone and Don Remley. They were both very professional and organized. Being on the School Board, we definitely have busy lives and inundated with reports and budgets. Because of our busyness, we were unable to fully establish a top notch recruiting process, which resulted in hiring The Cosca Group. Their leadership and expertise enabled us to fully rely on their abilities in recruiting a Superintendent that we could bring in to lead our school district.

One of the best attributes of The Cosca Group was hearing the needs of our school district and ensuring the voice of the School Board was heard. Through many hours of meetings and brainstorming, both Steve and Don did an exceptional job of gathering our thoughts and bringing all together for the recruitment process. At the end, we were able to have great educators apply for the WJUSD Superintendent position. From those finalists, we hired Dr. Maria Armstrong.

Since the hiring of Dr. Armstrong, our new Superintendent, The Cosca Group has kept to their contract and continues to mentor her throughout the first year. We have been very satisfied of the entire recruiting and hiring process that The Cosca Group has endured for the district. Their high professionalism and organizational fortitude has been evident throughout the whole process.

The Woodland Joint Unified School District has used The Cosca Group in two occasions and in both instances they have delivered a highly qualified Superintendent. They continue to be a well-respected organization and highly recommend their services.

Sincerely,

Samuel Blanco III, President (2013-14)  
WJUSD Trustee

---

Rose Ramos  
Assistant Superintendent  
Business Services

Dr. Debra Calvin  
Associate Superintendent  
Educational Services

Tom Pritchard  
Assistant Superintendent  
Human Resources

1886



SOUTH PASADENA UNIFIED SCHOOL DISTRICT

March 10, 2014

To Whom It May Concern:

The South Pasadena Unified School District's Board of Education has twice engaged The Cosca Group in the hiring process of a superintendent. The first time was four and a half years ago and the second time is reaching completion with our new superintendent commencing his duties in two weeks time. As Board President on both occasions I have been extremely pleased with both searches for a variety of reasons. Most importantly in both cases we have been immensely pleased with our final choice of superintendent. Four years ago we chose Mr. Joel Shapiro, formerly of Glendale USD and Burbank USD. He has demonstrated over the past four and a half years the precise leadership skills our District and community needed. Unfortunately Joel has had some health problems and needed to retire earlier than anticipated, necessitating another search. Although our upcoming Superintendent, Dr. Geoff Yantz, has not officially begun his time with us, the entire Board could not be more excited and pleased with our choice.

There was no question in mind of which search firm to hire for this second round. Previous to these searches we utilized two other prominent search firms which did not result in a positive outcome. We had a limited number of applicants to choose from that were ultimately not successful. The Cosca Group becomes very personally invested in the searches in a way that the other firms did not. In both searches Dr. Frank Cosca and Dr. Steve Goldstone were our consultants. They came to know Board members, our staff and the community and thus our culture, priorities and needs with amazing depth in a short period of time via meetings with all stakeholders. They are passionate about education and the importance of getting the right superintendent/district match for the sake of students and staff.

I certainly hope we will not be doing another search process in the near future, but if and when we do, I would utilize The Cosca Group in the blink of an eye. They have earned my loyalty and trust.

Please feel free to contact me should you have specific questions regarding our experience with The Cosca Group. (626-375-8140, eilers@fc.spusd.net)

Sincerely,

Elisabeth C. Eilers, MA, MS, MFT

Board President

1020 EL CENTRO STREET • SOUTH PASADENA, CALIFORNIA 91030 • (626) 441-5810, EXT. 1100 • FAX (626) 441-5815  
SOUTH PASADENA HIGH SCHOOL • SOUTH PASADENA MIDDLE SCHOOL • ARROYO VISTA ELEMENTARY SCHOOL  
MARENGO ELEMENTARY SCHOOL • MONTEREY HILLS ELEMENTARY SCHOOL

## LIST OF SEARCHES

Baldy View Regional Occupational Program	Bonita Unified School District (2)
Chino Valley Unified School District	Culver City Unified School District
Delhi Unified School District	Desert Sands Unified School District
El Rancho Unified School District	El Segundo Chamber of Commerce
El Segundo City Police Department	Escondido Union School District
Fillmore Unified School District	Hayward Unified School District
Hermosa Beach City School District	Huntington Beach City School District
Keppel Union School District	King City Unified School District
Laguna Beach Unified School District	Livermore Valley Joint Unified School District
Lytle Creek Development Partners	Madera Unified School District
Monrovia Unified School District	Monterey-Peninsula Unified School District
Moreno Valley Unified School District	Morgan Hill Unified School District
Mountain View-Whisman School District	National City School District
Novato Unified School District	Ocean View School District
Orange Unified School District	Palos Verdes Peninsula Unified School District
Paradise Unified School District	Redondo Beach Unified School District
Rialto Unified School District	Rocklin Unified School District
Saint Helena Unified School District	San Bernardino Unified School District
San Gabriel Unified School District (2)	San Lorenzo Unified School District (2)
Santee School District	Silver Valley Unified School District
South Pasadena Unified School District	Sweetwater Union High School District
Sulphur Springs School District	Tahoe Truckee Unified School District
Tamalpais Union High School District	University of Southern California
Vista Unified School District	Washington Unified School District (2)
Washington Union School District	Waugh School District
Windsor Unified School District	Wiseburn School District
Woodland Joint Unified School District (2)	Yosemite Unified School District

# ATTACHMENT A

## CERTIFICATE OF LIABILITY INSURANCE



### CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
1/23/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Poms & Associates Insurance Brokers CA License #0814733 5700 Canoga Ave. #400 Woodland Hills CA 91367	<b>CONTACT NAME:</b> Wendy Cohl <b>PHONE (A/C No. Ext.):</b> (800) 578-8802 <b>FAX (A/C. No.):</b> (818) 449-9321 <b>E-MAIL ADDRESS:</b> WCohl@pomsassoc.com														
<b>INSURED</b> TCG Leadership Development Corporation DBA: The Cosca Group P.O. Box 2162 Oroville CA 95965	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> <tr> <td>INSURER A: United States Liability Insurance</td> <td>25895</td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: United States Liability Insurance	25895	INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER B:															
INSURER C:															
INSURER D:															
INSURER E:															
INSURER F:															

**COVERAGES**      **CERTIFICATE NUMBER:** 15-16 GL, E60      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSTR. I.D.R.	TYPE OF INSURANCE	ADDITIONAL INSURED	COVERAGE	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXP. DATE (MM/DD/YYYY)	LIMITS	
<b>A</b>	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			CXI 006672F	12/31/2015	12/31/2016	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (EA OCCURRENCE) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ Included GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ Included	
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS							COMBINED SINGLE LIMIT (EA ACCIDENT) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED.    RETENTIONS \$							EACH OCCURRENCE \$ AGGREGATE \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N <input checked="" type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below							<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
<b>A</b>	<b>Errors &amp; Omissions</b> Claims Made			CXI 006672F	12/31/2015	12/31/2016	\$1M Each Claim                    \$1,000 Ded \$3M Aggregate	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
**Evidence of insurance coverage as respects General Liability and Professional Liability presented to Hollister School District.**

<b>CERTIFICATE HOLDER</b>  Hollister School District 2690 Cienega Rd. Hollister, CA 95023	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  Wendy Cohl/WCOHL <span style="float: right;"><i>Wendy Cohl</i></span>
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