

# JGCONSULTING

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## PROPOSAL

San Dieguito Union High School District

Superintendent Search Services



June 7, 2021

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**MEMORANDUM**

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Dear San Dieguito Union High School District Board of Trustees:

JG Consulting welcomes the opportunity to serve the San Dieguito Union High School District (SDUHSD) as the firm to manage the executive search process for the purpose of identifying a *Superintendent of Schools*. Our firm will manage the recruitment process in collaboration with the Board. 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 the position of Superintendent.

JG Consulting works with school districts to find Superintendents, CEO's, Directors, executive-level administrators, regional-level administrators, principals and teachers. 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 position profile. JG Consulting acknowledges the importance of supporting the executive search needs to ensure a strong intersection of talent.

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

Our firm's expertise is perfectly aligned to serve 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 for a Superintendent. JG Consulting will conduct the Superintendent search again in its entirety at no cost to SDUHSD if the hired candidate serves the district less than two years.

Respectfully,

James Guerra

James Guerra  
President & CEO

JG Consulting | a "One-Fourth Consulting, LLC" company

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## 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 education landscape including the districts we support. We strive to develop new relationships with each new partnership.

JG Consulting promises ongoing communication with the Board and candidates to ensure a seamless recruitment process.

**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 Superintendent search will be managed onsite and remotely during each phase of the process. JG Consulting has a number of Faculty members across the US who are readily accessible to support the San Dieguito Union High School District.

**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, "Modern Hire", unlike any other firm in the country that will allow the Board to review candidate interviews and profiles on-demand. This tool enables us to efficiently recruit candidates while saving the district additional costs.

**JG Consulting accessibility and team members.**

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

James Guerra represents Superintendent Search process the President & CEO of JG Consulting. James founded the organization in 2014 and has since led school systems nationwide to recruit executive talent.

Dr. Jose Leyba will serve the SDUHSD as a Senior Search Consultant. Dr. Leyba most recently served the Isaac School District as the Superintendent before retiring. He also represented the Association of Latino Administrators and Superintendents (ALAS) as the Executive Director of the Superintendents Leadership Academy (SLA).

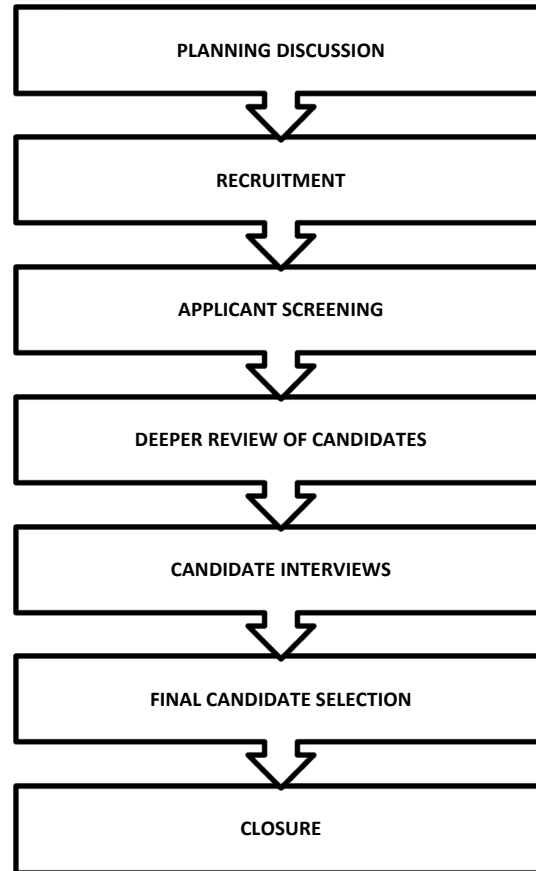
**JG Consulting is committed to working in any district seeking to recruit talented educators.**

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

## SUPERINTENDENT EXECUTIVE SEARCH: WORK PLAN

### 1. Planning Discussion & Trustee Interviews

- Trustee interviews;
- Staff, Student, Stakeholder and community-related meetings;
- 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 educational publications, various websites with state organizations, 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 solely 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 to the Board of Trustees. 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 other 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 the 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 the position profile;
- The Board will have access to each candidate's profile during the executive search.

**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. *We do not work with a “stable” of candidates;*
- Additionally, JG Consulting will conduct thorough background checks of each candidate with a third-party;
- JG Consulting is a registered agent with E-Verify;
- *JG Consulting does not discriminate against any employee or job candidate because of his race, color, religion, national origin, sex (including pregnancy), physical or mental disability, or age.*

**6. Candidate Interviews**

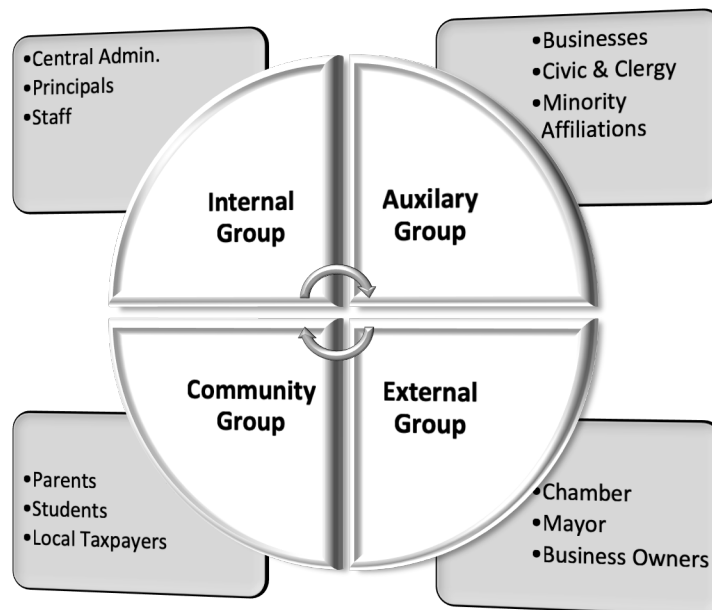
- JG Consulting will provide comprehensive profiles of each candidate selected for an interview;
- Profiles will include: a synopsis completed by the firm, access to the Modern Hire interview portal for each candidate, responses to preliminary screening questions, detailed responses from the personal interview rubric, a comprehensive background check by a third-party, completed reference checks and original resume. We work with each group to ensure that the candidates have been vetted.

**7. Deliberation in the selection process of candidates for final consideration.**

- Arrange for candidate district visits, if applicable. At the request of the Board.

**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 Board. We will serve as an intermediary to construct the Superintendent’s contract, if requested by the Board.

**Example Stakeholder Meetings<sup>1</sup>**

<sup>1</sup> Stakeholder recommendations will be made by the Board. We will also post an online survey accessible on the San Dieguito Union High School District website to protect the anonymity of the public and staff.

**SUPERINTENDENT EXECUTIVE SEARCH: PROPOSED TIMELINE**

<b>Proposed Activities</b>	<b>Proposed Timelines<sup>1</sup></b>
1. Planning discussion to initiate the Superintendent search with each Trustee	June
2. Internal and External Community-related meetings: a. <u>July – August</u> <sup>2</sup> ; Online survey (duration of the executive search); in-person meetings; virtual meetings (when allowable).	July – August
3. Present formal scope of work and preliminary job profile to the Board during executive session for approval and/or necessary modifications, research recruiting channels within PreK-12 and external networks; define marketing and recruiting strategies.	August
4. Candidate Application Portal is Open • Marketing and Recruiting Activities; • Local, state, regional and national publications; • Other education publications and websites; • Campaigns: E-mails, calls, virtual meetings and in-person recruitment at national conferences.	August – September
5. JG Consulting candidate screening; includes online interviews	August – September
6. Application due date	September
7. Prepare and present pre-screened applicants in a reporting format and with access to the online interview videos	September
8. Candidate Interviews: Round I	Early October
9. Candidate Interviews: Round II	Mid-October
10. Name the Lone Finalist	October

**\*Timeline is customizable to the needs of the Board.**

<sup>1</sup> All dates will be aligned to meet the deliverables of the Board.

<sup>2</sup> In-person engagement meetings are contingent upon current pandemic restrictions.

**EXPERIENCE: CONSULTANTS**

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JG Consulting **experience.**

**Consulting Team Information:**

**James Guerra**  
**President & CEO**

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Austin, TX 78731  
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**Senior Search Consultant**

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**Administrative Chief**

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**JG Consulting has successfully managed more than 100 executive searches nationwide during the past 6-years. We have dedicated Faculty strategically located in the nation's largest markets. JG Consulting is the only full-service consulting firm supporting school districts nationwide based in Texas. We are also the only firm to host an annual Leadership Academy® to support the career development for aspiring leaders and superintendents.**

**[Faculty](#)**

**[Testimonials](#)**

**[Editorials](#)**

**Please refer to individual credentials and other acknowledgements of the designated consultants associated with the Superintendent Search Firm Services (following pages).**



## SUPERINTENDENT SEARCH REFERENCES: SCHOOL DISTRICTS

<p><b><u>Austin Independent School District</u></b>  <b>Geronimo Rodriguez, Board President</b>            4000 S. IH-35 Frontage Road            Austin, TX 78704            P: (512) 414-1700            E: <a href="mailto:geronimo4aisd@gmail.com">geronimo4aisd@gmail.com</a>  <b><u>Superintendent Search: 80,100 Students</u></b>  <b><u>Placed: Dr. Stephanie Elizalde</u></b></p>	<p><b><u>San Marino Unified School District</u></b>  <b>Shelley Ryan, Board President</b>            1665 West Drive            San Marino, CA 91108            P: (626) 299-7010            E: <a href="mailto:sryan@smusd.us">sryan@smusd.us</a>  <b><u>Superintendent Search: 4,400 Students</u></b>  <b><u>Placed: Dr. Jeff Wilson</u></b></p>
<p><b><u>Washoe County School District</u></b>  <b>Dr. Angela Taylor, Board President</b>            425 East Ninth Street            Reno, NV 89512            P: (775) 348-0200            E: <a href="mailto:ataylor@washoeschools.net">ataylor@washoeschools.net</a>  <b><u>Superintendent Search: 64,000 Students</u></b>  <b><u>Placed: Dr. Kristen McNeill</u></b></p>	<p><b><u>East Baton Rouge Parish Public School System</u></b>  <b>Mike Gaudet, Board President (former)</b>            1050 S. Foster            Baton Rouge, LA 70806            P: (225) 229-5584            E: <a href="mailto:mgaudet@ebrschools.org">mgaudet@ebrschools.org</a>  <b><u>Superintendent Search: 41,000 Students</u></b>  <b><u>Placed: Dr. Sito Narcisse</u></b></p>
<p><b><u>Lamar Consolidated Independent School District</u></b>  <b>Joy Williams, Board President</b>            3911 Avenue I            Rosenberg, TX 77471            P: (832) 489-5191            E: <a href="mailto:joy.williams@lcsd.org">joy.williams@lcsd.org</a>  <b><u>Superintendent Search: 36,000 Students</u></b>  <b><u>Placed: Dr. Roosevelt Nivens</u></b></p>	<p><b><u>San Benito Consolidated Independent School District</u></b>  <b>Orlando Lopez, Board President</b>            240 N. Crockett Street            San Benito, TX 78586            P: (956) 241-1276            E: <a href="mailto:olopez@sbcisd.net">olopez@sbcisd.net</a>  <b><u>Superintendent Search: 11,000 Students</u></b>  <b><u>Placed: Dr. Nate Carman</u></b></p>
<p><b><u>Hutto Independent School District</u></b>  <b>Terrence Owens, Board Vice President</b>            200 College Street            Hutto, TX 78634            P: (512) 759-3771            E: <a href="mailto:terrence.owens@huttoisd.net">terrence.owens@huttoisd.net</a>  <b><u>Superintendent Search: 8,000 Students</u></b>  <b><u>Placed: Dr. Celina Estrada Thomas</u></b></p>	<p><b><u>Victoria Independent School District</u></b>  <b>Tami Keeling, Board President</b>            102 Profit Drive            Victoria, TX 77901            P: (361) 935-5142            E: <a href="mailto:tami.keeling@hotmail.com">tami.keeling@hotmail.com</a>  <b><u>Superintendent Search: 14,000 Students</u></b>  <b><u>Placed: Dr. Quintin Shepherd</u></b></p>
<p><b><u>Crosby Independent School District</u></b>  <b>Tanya Eagleton, Board President</b>            706 Runneburg            Crosby, TX 77532            P: (281) 917-6328            E: <a href="mailto:tanya.eagleton@yahoo.com">tanya.eagleton@yahoo.com</a>  <b><u>Superintendent Search: 6,000 Students</u></b>  <b><u>Placed: Paula Patterson</u></b></p>	<p><b><u>DeSoto Independent School District</u></b>  <b>Carl Sherman, Jr. Board President (former)</b>            200 E. Belt Line Road            DeSoto, TX 75115            P: (972) 595-4510            E: <a href="mailto:carl.sherman@desotoisd.org">carl.sherman@desotoisd.org</a>  <b><u>Superintendent Search: 9,000 Students</u></b>  <b><u>Placed: Dr. D'Andre Weaver</u></b></p>

## SUPERINTENDENT SEARCH REFERENCES: SCHOOL DISTRICTS

<p><b><u>McAllen Independent School District</u></b>  <b>Marco Suarez, Board President</b>            2000 N. 23<sup>rd</sup> Street            McAllen, TX 78501            P: (956) 451-3275            E: <a href="mailto:marco.suarez@mcallenisd.net">marco.suarez@mcallenisd.net</a>  <b><i>Superintendent Search: 23,000 Students</i></b>  <b><i>Placed: Dr. Jose Gonzalez</i></b></p>	<p><b><u>Donna Independent School District</u></b>  <b>Eva Watts, Board President (former)</b>            116 N. 10<sup>th</sup> Street            Donna, TX 78537            P: (956) 464-1600            E: <a href="mailto:ewatts@donnaisd.net">ewatts@donnaisd.net</a>  <b><i>Superintendent Search: 14,000</i></b>  <b><i>Placed: Dr. Hafedh Azaiez</i></b></p>
<p><b><u>St. John the Baptist Parish Schools</u></b>  <b>Patrick Sanders, Board President</b>            118 West 10<sup>th</sup> Street            Reserve, LA 70084            P: (504) 628-0306            E: <a href="mailto:psanders@stjohn.k12.la.us">psanders@stjohn.k12.la.us</a>  <b><i>Superintendent Search: 6,000 Students</i></b>  <b><i>Placed: Dr. Lynett Hookfin</i></b></p>	<p><b><u>San Marcos Consolidated Independent School District</u></b>  <b>John McGlothlin, Board President (former)</b>            631 Mill Street            San Marcos, TX 78666            P: (512) 393-6700            E: <a href="mailto:john.mcglathlin@smcisd.net">john.mcglathlin@smcisd.net</a>  <b><i>Superintendent Search: 8,000 Students</i></b>  <b><i>Placed: Michael Cardona</i></b></p>
<p><b><u>Agua Fria Union High School District (AZ)</u></b>  <b>Vickie Landis, Board President</b>            1481 N. Eliseo Felix Jr. Way            Avondale, AZ 85323            P: (623) 203-8024            E: <a href="mailto:vlandis@aguafria.org">vlandis@aguafria.org</a>  <b><i>Superintendent Search: 8,000 Students</i></b>  <b><i>Placed: Mark Yslas</i></b></p>	<p><b><u>Dripping Springs Independent School District</u></b>  <b>Barbara Stroud, Board President</b>            510 W. Mercer St.            Dripping Springs, TX 78620            P: (512) 858-3000            E: <a href="mailto:Barbara.stroud@dsisdtx.us">Barbara.stroud@dsisdtx.us</a>  <b><i>Superintendent Search: 7,000 Students</i></b>  <b><i>Placed: Dr. Holly Morris-Kuentz</i></b></p>
<p><b><u>New Braunfels Independent School District</u></b>  <b>Sherry Harrison, Board President</b>            1000 N. Walnut Blvd.            New Braunfels, TX 78130            P: (830) 708-3506            E: <a href="mailto:sharrison@nbisd.org">sharrison@nbisd.org</a>  <b><i>Superintendent Search: 9,300 Students</i></b>  <b><i>Placed: Dr. Cade Smith</i></b></p>	<p><b><u>Kansas City, Kansas Public Schools</u></b>  <b>Randy Lopez, Board President</b>            2010 N. 59<sup>th</sup> St.            Kansas City, KS 66104            P: (913) 302-4315            E: <a href="mailto:randy.lopez@kckps.org">randy.lopez@kckps.org</a>  <b><i>Superintendent Search: 22,000 Students</i></b>  <b><i>Placed: Dr. Anna Stubblefield</i></b></p>
<p><b><u>Adams County School District 14</u></b>  <b>Ramona Lewis, Board President</b>            5291 E. 60<sup>th</sup> Ave.            Commerce City, CO 80022            P: (303) 356-3223            E: <a href="mailto:rlewis@adams14.org">rlewis@adams14.org</a>  <b><i>Superintendent Search: 6,000 Students</i></b>  <b><i>Placed: Dr. Karla Loria</i></b></p>	<p><b><u>Houston Independent School District</u></b>  <b>Dr. Patricia Allen, Board President</b>            4400 West 18<sup>th</sup> St.            Houston, TX 77092            P: (713) 556-6000            E: <a href="mailto:Patricia.Allen2@houstonisd.org">Patricia.Allen2@houstonisd.org</a>  <b><i>Superintendent Search: 200,000 Students</i></b>  <b><i>Placed: Millard House II</i></b></p>

**SUPERINTENDENT EXECUTIVE SEARCH: COST****Analysis**

The Superintendent Search will begin immediately upon award. JG Consulting will correlate to the timeline goals set forth by San Dieguito Union High School District.

The firm will work diligently onsite in the district with the Board and community stakeholders as often as requested. The team of consultants will also engage in various remote activities to ensure maximum productivity.

**Travel and expenses are all-inclusive with the “*Superintendent Search Firm Services*” cost listed below for services rendered by JG Consulting.**

**Travel and expenses are dependent on the Superintendent candidates’ in-person interviews.**

**Estimated travel and expenses per Superintendent candidate = \$1,500/Day**

- Includes airfare; if applicable;
- Local transportation (rental car or other), if applicable;
- Meals, if applicable;
- Lodging, if applicable.

There are no additional publishing and advertising fees associated with the Superintendent Search. The firm will incur any and all costs. We rely on various outlets but primarily engage with our national network and affiliates.

**JG Consulting will also incur the cost of the on-demand interview subscription, Modern Hire, Inc.**

Payment terms are \$12,500 upon execution of the contract. The final payment of \$12,500 will be due upon the hiring of a candidate. Payment is due net 30-days for each installment.

**Total Cost for All Services Rendered = \$25,000 (All-Inclusive & Not to Exceed).**

Bid Contact Person:

**James Guerra**

**President & CEO**

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C: (214) 934-5537

E: [james@jgconsulting.us](mailto:james@jgconsulting.us)

**ADDITIONAL SERVICES: PROFESSIONAL DEVELOPMENT**

The JG Consulting team and faculty can serve as a resource for the newly hired Superintendent with onboarding and transition planning, if applicable. San Dieguito Union High School District may engage with JG Consulting to provide 1:1 or small group coaching with various levels of district leadership. This level of service is available in-person and/or online. The Board, Superintendent, executive-leadership team and site-based staff will have an opportunity to engage with our Faculty when needed.

Our distinguished Faculty may support the Board and District Leadership with professional development opportunities. The design of the training workshops is dependent on the goals and needs of the district. The JG Consulting team will customize a plan of action according to the unique goals and needs of the District with ongoing support consisting of onsite work sessions and regular communication. Our goal is to serve the district as a resource to promote continuous student achievement starting with the Board and District Leaders.

**90-Day Advertising Plan<sup>3</sup>**

<b>Description</b>	<b>Details</b>	<b>Total Estimate<sup>4</sup></b>
Association of Latino Admin. & Supts. (ALAS)	<i>60-Day Listing</i>	Included
Direct Recruitment of Administrators (National)	<i>Supts./C-Level Admin.</i>	Included
LinkedIn	<i>60-Day listing</i>	Included
American Association of School Admin. (AASA)	<i>Length of Search</i>	Included
JG Consulting Website, Twitter (2) & The Scoop	<i>Countless Views</i>	Included
National Alliance of Black School Educators (NABSE)	<i>Length of Search</i>	Included
Association of CA School Admin. (ACSA)	<i>Length of Search</i>	Included

**The costs associated in Advertising Plan will be incurred by JG Consulting. No advertising fees will be charged to the district.**

<sup>3</sup> Advertising plan will correlate to our proposed timeline (page 7 of the JG Consulting proposal); we will customize the plan to meet the needs of the Board. Each national organization includes their state affiliates.

<sup>4</sup> The cost associated with each advertisement will be incurred by JG Consulting.

*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 *MJ* JACOBSON, LLC**

**EXECUTIVE RECRUITMENT & DEVELOPMENT**



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ITEM 11e

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06/21



## *Letter of Interest*



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



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888-375-4814 ♦ Email: [mail@macnjake.com](mailto:mail@macnjake.com) ♦ Website: [www.macnjake.com](http://www.macnjake.com)

June 3, 2021

Board of 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 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.

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

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

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

Our contact information:

California School Boards Association  
Attn: Nicole Delos Reyes  
3251 Beacon Blvd.  
West Sacramento, CA 95691  
888-375-4814  
Email: [mail@macnjake.com](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.

## *About McPherson & Jacobson*

### *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.

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

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

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

#### **Leading National Search Firm**

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

#### **Nationwide Network of Experienced Consultants**

McPherson & Jacobson has **over 110 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors,

and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

## **Sustainability in Leadership**

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

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

## *McPherson & Jacobson, L.L.C. Equity Policy*

McPherson & Jacobson, L.L.C. is dedicated to serving school districts through an equity lens that supports all candidates regardless of cultural and ethnic diversity. In order to achieve this, we must embrace a culture of inclusion and acceptance.

As an organization, we are committed to equitable practices that will ensure the equal access for all candidates. This commitment means that success will not be predicted nor predetermined by race, ethnicity, socioeconomic status, cognitive/physical ability, language, marital status, gender, sexual orientation, gender identity, disability, or religion.

Every decision McPherson & Jacobson, L.L.C. makes will be committed to the following foundational beliefs:

1. Consultants share the moral imperative and collective ownership to identify and eliminate disparities to ensure all candidates have an equal opportunity regardless of their race, ethnicity, socioeconomic status, cognitive/physical ability, language, marital status, gender, sexual orientation, gender identity, disability, or religion;
2. Eliminate barriers in recruitment, hiring, retention, and internal processes;
3. Utilize culturally relevant practices that do not discriminate based upon language, marital status, gender, sexual orientation, gender identity, cognitive/physical ability, or religion;
4. Promote catalytic leadership for educational and community partners;
5. Support the continuing development of all personnel with a focus on their mindset, beliefs, knowledge, and skills, including an understanding of implicit bias and racial identity;
6. Incorporate the voices, cultures, and perspectives of diverse students, families, and communities into decision making to create a sense of belonging for all;
7. Support and comply with State and District policies on equity.

## *Applicant Diversity*

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

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

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

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

In the past ten years, **one-third** of the boards we have represented have placed women or ethnically diverse candidates.

## California Experience

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



**Christi Barrett, Ph.D.**  
Superintendent

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

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

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

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

[www.hemetusd.org](http://www.hemetusd.org)



[www.facebook.com/hemetunified](https://www.facebook.com/hemetunified)



[twitter.com/HemetUnified](https://twitter.com/HemetUnified)

August 13, 2020

To Whom It May Concern:

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

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

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

Sincerely,

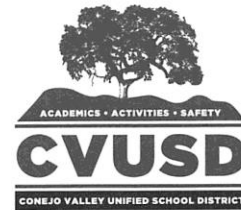
Christi Barrett, Ph.D.  
Superintendent

**BOARD OF EDUCATION**

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

**SUPERINTENDENT**

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

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

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

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

Betsy Connolly DVM



## Comments from Santa Barbara Unified School District

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

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

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

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

---

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

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



July 2018

To Whom It May Concern:

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

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

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

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

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

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

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

Claire Schumacher

Vice President

Fort Sage Unified School District Board of Trustees

## *Selected References*

### **Santa Barbara Unified School District**

720 Santa Barbara Street  
Santa Barbara CA 93101  
School Phone: 805-963-4338  
School District Contact: Sandra Trujillo  
Board Contact: Laura Capps 805-245-5465  
Search Year: 2019/20  
Enrollment: 15,000

### **San Mateo-Foster City School District**

1170 Chess Drive  
Foster City CA 94404  
School Phone: 650-312-7700  
School District Contact: Ana Almen  
Board Contact: Ken Chin 415-722-2207  
Search Year: 2020/21  
Enrollment: 11,000

### **New Haven Unified School District**

34200 Alvarado-Niles Rd  
Union City CA 94587  
School Phone: 510-471-1100  
School District Contact: Lori Valdes  
Board Contact: Sharan Takhar Kaur 510-909-1592  
Search Year: 2018/19  
Enrollment: 12,000

### **Ventura Unified School District**

255 W. Stanley Ave Suite 100  
Ventura CA 93001-1348  
School Phone: 805-641-5000  
School District Contact: Martha Macias  
Board Contact: Velma Lomax 805-216-0363  
Search Year: 2016/17  
Enrollment: 17,000

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

**Albany Unified School District, Berkeley**  
Search Year: 2018/19, Enrollment: 3,714

**Alisal Union School District, Salinas**  
Search Year: 2019/20, Enrollment: 9,000

**Alpine Union School District, Alpine**  
Search Year: 2015/16, Enrollment: 1,700

**Anderson Union High School District, Anderson**  
Search Year: 2018/19, Enrollment: 1,800

**Benicia Unified School District, Benicia**  
Search Year: 2014/15, Enrollment: 5,000

**Calexico Unified School District, Calexico**  
Search Year: 2017/18, Enrollment: 8,966

**Cold Spring School District, Santa Barbara**  
Search Year: 2016/17, Enrollment: 175

**Conejo Valley Unified School District, Thousand Oaks**  
Search Year: 2014/15, Enrollment: 19,500

**Denair Unified School District, Denair**  
Search Year: 2017/18, Enrollment: 1,500

**El Monte Union High School District, El Monte**  
Search Year: 2014/15, Enrollment: 9,500

**Elk Grove Unified School District, Elk Grove**  
Search Year: 2014/15, Enrollment: 62,000

**Fallbrook Union High School District, Fallbrook**  
Search Year: 2018/19, Enrollment: 2,200

**Fort Sage Unified School District, Herlong**  
Search Year: 2016/17, Enrollment: 180

**Glendale Unified School District, Glendale**  
Search Year: 2014/15, Enrollment: 26,200

**Golden Valley Unified School District, Madera**  
Search Year: 2017/18, Enrollment: 1,950

**Grass Valley School District, Grass Valley**  
Search Year: 2019/20, Enrollment: 1,500

**Gustine Unified School District, Gustine**  
Search Year: 2014/15, Enrollment: 1,830

**Hacienda La Puente Unified School District, City of Industry**

Search Year: 2019/20, Enrollment: 22,000

**Hemet Unified School District, Hemet,**

Search Year: 2015/16, Enrollment: 21,000

**Johnstonville Elementary School District, Susanville**

Search Year: 2015/16, Enrollment: 205

**Lakeside Union School District, Bakersfield**

Search Year: 2014/15, Enrollment: 1,310

**Linden Unified School District, Linden**

Search Year: 2020/21, Enrollment: 2,300

**Nevada Joint Union High School District, Grass Valley**

Search Year: 2017/18, Enrollment: 2,600

**New Haven Unified School District, Union City**

Search Year: 2018/19, Enrollment: 12,148

**Newark Unified School District, Newark**

Search Year: 2019/20, Enrollment: 5,700

**Newcastle Elementary School District, Newcastle**

Search Year: 2014/15, Enrollment: 796

**Old Adobe Union School District, Petaluma**

Search Year: 2019/20, Enrollment: 2,097

**Oakley Union Elementary School District, Oakely**

Search Year: 2020/21, Enrollment: 4,900

**Oxnard Union High School District, Oxnard**

Search Year: 2019/20, Enrollment: 16,800

**Parlier Unified School District, Parlier**

Search Year: 2019/20, Enrollment: 3,500

**Paso Robles Joint Unified School District, Paso Robles**

Search Year: 2013/14, Enrollment: 6,500

**Penn Valley Union Elementary School District, Penn Valley**

Search Year: 2014/15, Enrollment: 700

**Piner-Olivet Union School District, Santa Rosa**

Search Year: 2019/20, Enrollment: 1,300

**Pollock Pines Elementary School District, Pollock Pines**

Search Year: 2015/16, Enrollment: 800

**Red Bluff Joint Union High School District, Red Bluff**

Search Year: 2013/14, Enrollment: 1,622

**Richland School District, Shafter**

Search Year: 2015/16, Enrollment: 3,504

**Roseville Joint Union High School District, Roseville**

Search Year: 2017/18, Enrollment: 10,300

**San Carlos School District, San Carlos**

Search Year: 2020/21, Enrollment: 2,900

**San Mateo-Foster City School District, Foster City**

Search Year: 2020/21, Enrollment: 11,000

**Santa Barbara Unified School District, Santa Barbara**

Search Year: 2019/20, Enrollment: 15,000

**Santa Paula Unifued School District, Santa Paula**

Search Year: 2020/21, Enrollment: 5,200

**Santa Ynez Valley Union High School District, Santa Ynez**

Search Year: 2020/21, Enrollment: 850

**Saugus Union School District, Santa Clarita**

Search Year: 2017/18, Enrollment: 10,000

**Sausalito Marin City School District, Marin City**

Search Year: 2015/16, Enrollment: 524

**Sierra-Plumas Unified School District/Sierra County Office of Education, Loyalton**

Search Year: 2018/19, Enrollment: 386

**Soledad Unified School District, Soledad**

Search Year: 2020/21, Enrollment: 5,000

**Soledad Unified School District, Soledad**

Search Year: 2016/17, Enrollment: 4,800

**Sonoma Valley Unified School District, Sonoma**

Search Year: 2020/21, Enrollment: 3,730

**Sonora Union High School District, Sonora**

Search Year: 2019/20, Enrollment: 1,000

**Strathmore Union Elementary School District, Strathmore**

Search Year: 2019/20, Enrollment: 773

**Vallecito Union School District, Avery**

Search Year: 2020/21, Enrollment: 600

**Vallejo City Unified School District, Vallejo**

Search Year: 2020/21, Enrollment: 11,500

**Ventura Unified School District, Ventura**

Search Year: 2016/17, Enrollment: 17,000

**Washington Unified School District, West Sacramento**

Search Year: 2020/21, Enrollment: 7,460

**Winship-Robbins Elementary School District, Meridian**

Search Year: 2013/14, Enrollment: 200

## *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.

ITEM 11e

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**

## *California Consultants*

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



## *Search Process*

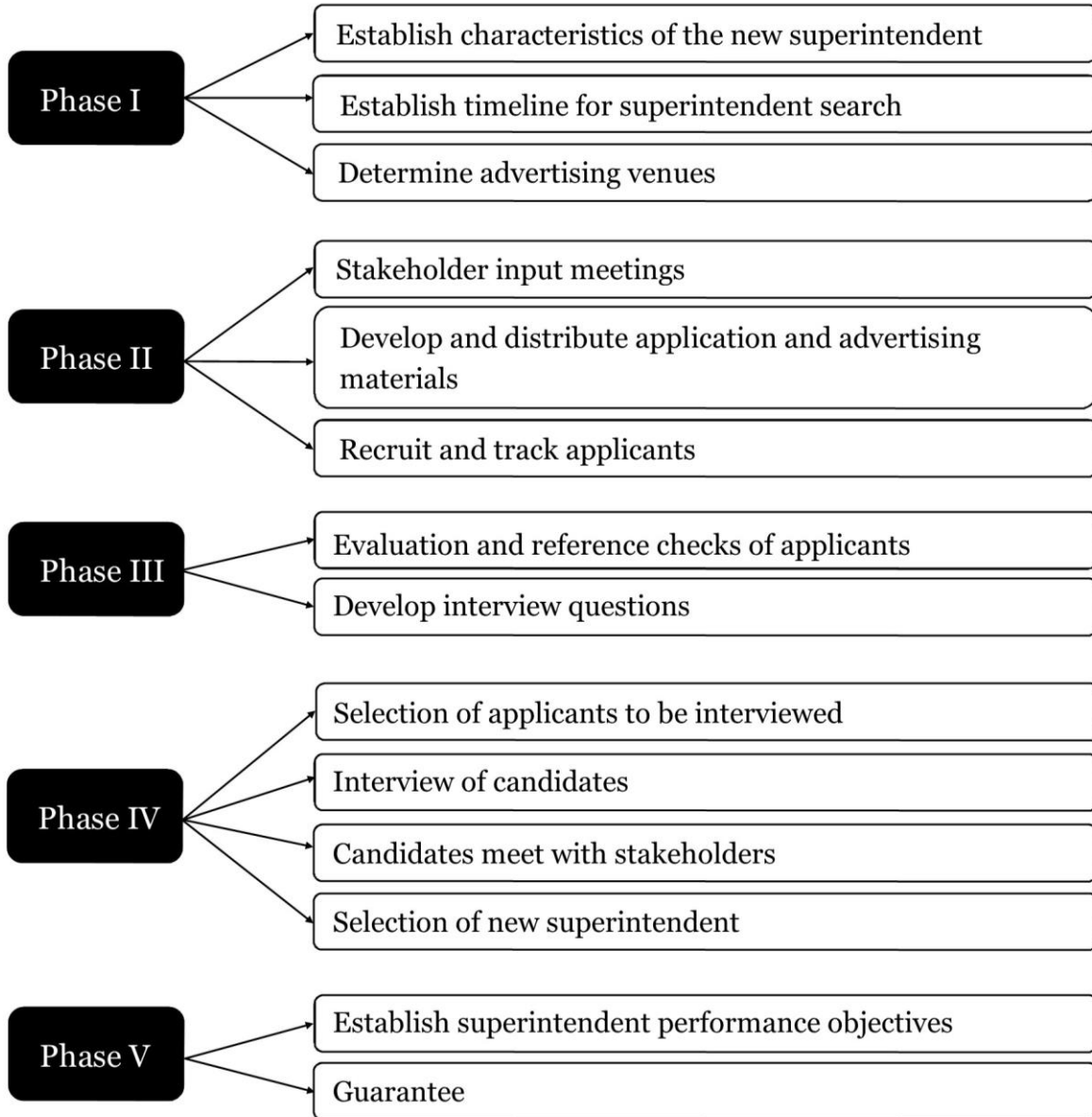
### *Executive Summary*

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

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

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

## *Five Phases of a Superintendent Search*



### Phase I—Initiating the Search Process

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

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

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

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

- ✓ **Determine, with the board, appropriate advertising venues.**

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

- ✓ **Identify appropriate stakeholder groups.**

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

- ✓ **Assist the board in determining compensation parameters.**

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

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

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

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

### Phase II—Stakeholder Input, Advertising the Position, Recruiting Applicants

- ✓ **Work with the district to schedule the stakeholder input meetings.**

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

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

The consultants will meet with the stakeholder groups identified by the board and solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the issues facing the new superintendent, and the characteristics they would like to see the new superintendent possess.

The board chooses which groups it would like the consultants to meet with, but the most common groups include central office administrators, building administrators, teachers, classified staff, students, and community and business groups. The consultants will assist the board in choosing which groups it wishes to include.

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

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

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

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

✓ **Prepare and place announcement of vacancy.**

McPherson & Jacobson's staff will prepare and place the announcement of vacancy. It will be sent to the 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 online. The website averages over 225,000 hits per month.

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

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

✓ **Post application information and notify interested applicants.**

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

*Phase III—Applicant Screening*

✓ **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 qualifications. We go a minimum

of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

✓ **Assist the board in developing a set of interview questions that reflect the identified selection criteria and characteristics.**

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

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

*Phase IV—Reviewing Candidates with the Board, Interviews*

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

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

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

✓ **Assist the board in determining interview procedures.**

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

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

✓ **Coordinate interview and visitation procedures.**

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

If the board chooses to involve stakeholder groups in the interview process, the consultants will assist in establishing the finalist interview schedule that includes district

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staff, students, and community groups. A typical interview day will include a tour of the district and community, meeting with stakeholder groups, and a formal interview with the board.

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

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

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

We encourage boards to invite spouse/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 spouse/significant others. To ensure that expenses stay within established guidelines, the consultants will assist the point of contact in making lodging and travel arrangements for each candidate.

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

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

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

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

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

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



✓ **Conduct background checks.**

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

*Phase V—Transition with Success*

✓ **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.

✓ **Provide a guarantee.**

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

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



## *Recruiting, Identifying, and Screening Applicants*

### *Advertising the Position*

The consultants will discuss with the board the advertising options available and the pricing for them. The minimum advertising we recommend are the following online venues: four (4) weeks of print advertising in EdCal (40-word ad) and sixty (60) days of advertising on EdJoin. .

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

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

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

### *Identifying and Recruiting Applicants*

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

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

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

Once the board has identified its selection criteria, the consultants of McPherson & Jacobson will immediately begin to identify potential applicants both locally and nationally. McPherson & Jacobson has over 110 consultants across the United States; we will send the information to all of our consultants across the United States, asking them to nominate candidates who would be a good match. Those candidates will be invited to apply. Some of our best candidates may not be actively seeking another position and will need to be recruited.

We do not maintain a stable of candidates, but we do follow the careers of successful administrators. Individuals who are currently looking to take a new position are encouraged to register with us so they can receive notification of the vacancies we are representing. We have over 1,000 potential applicants currently registered with McPherson & Jacobson who will receive notification of the superintendent opening. Additionally, we will vigorously pursue current or emerging leaders through personal contact.

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

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

### *Applicant Diversity*

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

McPherson & Jacobson has **over 110 consultants** across the nation. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence. In addition, McPherson & Jacobson consultants are members of the National Alliance of Black School Educators (NASBE), and the Association of Latino Administrators and Superintendents (ALAS).

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

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

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

### *Screening, Reference Checks, Interviews of Final Applicants*

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

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

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

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

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

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

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

## *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.

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

- At the beginning of the search (**June-July 2021**)
  - The qualities for the new superintendent are identified
  - A formal timeline is established
  - Advertising decisions are made
  - Application information is posted
  - A brochure is created to advertise the district and the vacancy
- At the time designated by the board (**July 2021**)
  - Stakeholder group meetings are held
  - A summary of stakeholder input is presented to the board
- As applications arrive in our office
  - Applications are monitored and applicants are notified of the deadlines to submit their materials
- After the closing date (**Late August 2021**)
  - All the completed applicant files are forwarded to the consultants
  - The consultants begin the review and pre-interview process
- Approximately two to four weeks after the closing date (**mid-September 2021**)
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles and video interviews 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 (**late September 2021**)
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent
  - A criminal/financial/credential verification background check is conducted on the selected candidate
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

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

<b>Event</b>	<b>McPherson &amp; Jacobson's Tasks</b>	<b>School District'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>○ Characteristics for the new superintendent</li> <li>○ The search calendar</li> <li>○ Compensation parameters</li> <li>○ Identify the appropriate constituent groups for stakeholder input</li> <li>○ Advertising venues</li> </ul> </li> <li><input type="checkbox"/> The consultant works with the Point of Contact to compile:                             <ul style="list-style-type: none"> <li>○ Information to create the brochure announcing the vacancy</li> <li>○ The list of names to be invited to the community input meetings</li> </ul> </li> </ul>	<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 Contact List</li> <li><input type="checkbox"/> Reviews and approves the brochure</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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Edit the brochure</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 up to date on the search</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Posts a link to the McPherson &amp; Jacobson website</li> <li><input type="checkbox"/> Posts the brochure (announcement of vacancy) on their website</li> <li><input type="checkbox"/> Advertises the opening on the district's social media platforms</li> </ul>

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Event	McPherson & Jacobson's Tasks	School District's Tasks
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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assists in organizing stakeholder focus groups and meeting schedule</li> <li><input type="checkbox"/> Names and addresses are sent to Home Office for community meeting invitations</li> <li><input type="checkbox"/> Posts meeting dates, times, and locations as open public forum</li> <li><input type="checkbox"/> Assists in translating stakeholder input survey into the additional language(s) requested by the school 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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Link to online stakeholder input form(s) is (are) posted on the school district website</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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> "Stakeholder Input Report" is posted on the school district website</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"/> 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>	

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Event	McPherson & Jacobson's Tasks	School District's Tasks
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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assist with lodging arrangements and welcome gifts</li> <li><input type="checkbox"/> Arrange for spouse/significant other tour</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>	<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"/> 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>
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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board meets and discusses each candidate individually</li> <li><input type="checkbox"/> Read input forms submitted by stakeholder input groups</li> <li><input type="checkbox"/> Have each board member rank order candidates</li> <li><input type="checkbox"/> Select minimum of #1 and #2 candidate</li> <li><input type="checkbox"/> Call and make offer to candidate</li> <li><input type="checkbox"/> Send interview forms and files to the Home Office</li> <li><input type="checkbox"/> Board evaluates our services</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>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Superintendent creates plan with target objectives and timelines</li> <li><input type="checkbox"/> Plan is sent to consultant to be reviewed</li> <li><input type="checkbox"/> Board adopts plan</li> </ul>



## *Communicating and Working with the Board*

The consultants will be in contact with the board president during the search as necessary to give updates on the progress. The consultants are available by phone or email to address any concerns or answer any questions the board has during the search process.

The McPherson & Jacobson consultants will meet with the entire board for three meetings:

1. Initial meeting to determine the criteria for the new superintendent, advertising venues, and stakeholder groups for input meetings.
2. Review of stakeholder input. At this meeting, the input obtained from the stakeholder meetings will be presented to and reviewed with the board. In addition, the interview schedule, interview questions, and salary for the new superintendent will be discussed at this meeting.
3. Presentation of the candidates to the board. At this meeting, the consultants will give the board a complete list of those who completed the application process, and will present additional information about the applicants that most closely meet the district's criteria. The consultants will assist the board in determining which applicants it wishes to interview.

In addition, the consultants will send regular emails to the board members keeping them abreast of the status of the search.

## *Stakeholder Involvement*

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 815 superintendent searches for school districts ranging from 10 to over 300,000 students. For each search, we have coordinated stakeholder input sessions. Besides meeting with stakeholder groups designated by the board, an online input survey is also available for those who cannot attend the meetings. After the meetings have been completed, the board will receive a written report with the findings of the meetings and online input.

### **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. Student input sessions are not scheduled during class time, they are normally held during lunch breaks.

**Process for Obtaining Parent and Community Input**

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

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

**Process for Obtaining Online Stakeholder Input**

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

**Consultants for Search****William Huyett—Lead Consultant****241 River Oaks Drive****Lodi, CA 95240****Email: b\_huyett@macnjake.com****Phone: 209-334-3375****Educational Background**

Administrative Credential	California State University	
M.A.T.	University of Virginia	Math Education
B.S.	University of Virginia	Mechanical Engineering

**Professional Experience**

<b>Dates</b>	<b>Title</b>	<b>District</b>	<b>Location</b>	<b>Enrollment</b>
2013 to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2008 to 2012	Superintendent	Berkeley Unified School District	Berkeley, CA	9,000
2000 to 2008	Superintendent	Lodi Unified School District	Lodi, CA	30,000
1996 to 2000	Superintendent	Dixon Unified School District	Dixon, CA	4,000
1992 to 1996	Assistant Superintendent for Secondary Education	Elk Grove Unified School District	Elk Grove, CA	60,000
1998 to 1992	H.S. Principal	Elk Grove Unified School District	Elk Grove, CA	1,800
1984 to 1988	H.S. Principal	Elk Grove Unified School District	Elk Grove, CA	1,800
1982 to 1984	M.S. Principal	Elk Grove Unified School District	Elk Grove, CA	1,800
1978 to 1982	H.S. Vice Principal/Admin. Assistant	Elk Grove Unified School District	Elk Grove, CA	1,800
1974 to 1978	Mathematics & Physics Teacher	Elk Grove Unified School District	Elk Grove, CA	1,800

**Professional Organization Memberships**

<b>Name of Organization</b>	<b>Offices Held</b>
California High School Task Force	Chair of the Curriculum Committee
Northern California Superintendents Association	Secretary/Treasurer
WASC Advisory Committee	Committee Chair
ACSA Superintendent Academy Faculty	

**Mr. William Huyett** joined McPherson & Jacobson in 2013 and is on the Board of Directors. He is a retired educator who served as a teacher and administrator for 38 years in Northern California. He received a BS in Mechanical Engineering and Masters in Teaching from the University of Virginia. In 1974 Bill started his career as a math and physics teacher at Elk Grove High School. As a site administrator in Elk Grove Unified, he was a vice principal for four years and a principal for ten years at Rutter Middle School, Elk Grove High School and Florin High School.

Bill continued his career as an assistant superintendent for secondary schools in Elk Grove and then served as a superintendent for 16 years in Dixon, Lodi, and Berkeley Unified School Districts.

Superintendent searches Mr. Huyett has participated in as lead or associate consultant:

- Newcastle Elementary School District
- Sausalito Marin City School District
- Sonora Union High School District
- Albany Unified School District
- San Carlos School District
- New Haven Unified School District
- Parlier Unified School District
- Alisal Union School District
- New Haven Unified School District
- Newark Unified School District
- Nevada Joint Union High School District
- Berkeley Unified School District--Executive Director for Special Education
- Elk Grove Unified School District
- Glendale Unified School District
- Parlier Unified School District
- Vallejo City Unified School District
- Washington Unified School District
- San Mateo-Foster City School District
- Old Adobe Union School District
- Red Bluff Joint Union High School District
- Paso Robles Joint Unified School District

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

### **Educational Background**

B.A. University of California, Irvine, CA Psychology

### **Professional Experience**

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

### **Community/Service/Fraternal Organizations**

<b>Name of Organization</b>	<b>Dates</b>	<b>Offices Held</b>
Parkview Community Hospital Advisory Committee	2012 to Present	Member
Riverside Community Health Foundation	2007 to Present	Board of Directors
Alvord Unified School District	1995 to 2017	President Alvord Board of Education
Sigma Alpha Epsilon Alumni Association	1993 to Present	Advisory Board

**Community/Service/Fraternal Organizations (continued)**

<b>Name of Organization</b>	<b>Dates</b>	<b>Offices Held</b>
California Association of Healthcare Purchasing and Material Management		Member
Western States Healthcare Materials Management Association		Member
HMFA		Member
ACHE		Vice-Chairman Inland Empire Chapter

Ben Johnson II joined McPherson & Jacobson in 2014.

Mr. Johnson served on the Alvord Board of Trustees for twenty-one years. During that time, the district experienced positive advances in academics and facility improvement at all school sites in the district.

In addition to his service as an Alvord Trustee, Ben has a legacy serving his local community. He is a committed citizen who has established himself with a distinguished record of volunteer and community service efforts. His dedicated volunteerism earned him recognition as the recipient of the Outstanding Citizen Award for Riverside County, and the Volunteer of the Year Award from the JC Penney Points of Light Program.

Ben has served in a variety of leadership and service roles including the Riverside Community Health Foundation, Board of Directors for Big Brothers Big Sisters, Parkview Hospital's Citizen Advisory Committee, Vice-Chair of both the Human Relations Committee and the City of Riverside Charter Review; a member of the Riverside Blueprint for Diversity, Raincross Group, a member of the Board of directors for the Youth Service Center; Director of Homeless Outreach and President of the Sigma Alpha Epsilon Alumni Association.

Ben earned his bachelor's degree from the University of California at Irvine. Ben has over 20 years of leadership development, recruiting/staffing, and teambuilding.

Superintendent searches Mr. Johnson has participated in as lead or associate consultant:

- Hacienda La Puente Unified School District
- Oxnard Union High School District
- Santa Paula Unified School District
- Oakley Union Elementary School District
- Ventura Unified School District
- Cold Spring School District
- Hemet Unified School District
- Santa Ynez Valley Union High School District
- Saugus Union School District
- Santa Barbara Unified School District
- Soledad Unified School District
- Sonoma Valley Unified School District
- Glendale Unified School District

## **Cost Proposal**

### *Investment*

***The not to exceed amount for conducting an online superintendent search is \$25,200.\****

*Included in this amount is:*

- Phases I-V of the superintendent search process
- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin
- Online stakeholder meetings
- Online stakeholder input surveys
- Video interviews of candidates
- Criminal/financial/credential verification background check for the final candidate
- Office expenses

*\*Travel expenses for the consultants to the district are not included in this amount. If the board requests onsite meetings,*

***The not to exceed amount for conducting an in-person superintendent search is \$28,700.***

#### **NOTE:**

- Expenses may increase if the district chooses additional media advertising.
- Interview expenses for the candidates are not included in the expenses listed.

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

#### **Guarantee:**

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

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

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**Additional Services:**

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

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

*Price Breakdown for Search Activities*

<b>Phase</b>	<b>Description of Services</b>	<b>Fee</b>	<b>Expenses</b>
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	<b>\$ 4,500</b>	<b>\$ 2,150</b>
II	Conduct stakeholder input meetings. Begin candidate recruitment.	<b>\$ 6,000</b>	<b>\$ 350</b>
III	Continue candidate recruitment. Conduct reference checks on applicants.	<b>\$ 6,000</b>	<b>\$ 200</b>
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.	<b>\$ 4,500</b>	<b>\$ 350</b>
V	Meet with the board to determine the superintendent performance objectives.	<b>\$ 1,000</b>	<b>\$ 150</b>
<b>Totals</b>		<b>\$22,000</b>	<b>\$ 3,250</b>
	<b>Total (excluding travel)*</b>	<b>\$25,200</b>	
	<b>Total (including consultant travel for four (4) trips to the district)</b>	<b>\$28,700</b>	

\*Fees and/or expenses will increase if

- the board chooses advertising media over \$ 2,000;
- the board requests more than two (2) days of in-person stakeholder input sessions;
- the board requests consultants be present at meetings not included above;
- actual travel costs increase due to changing prices.





ITEM 11e

June 7, 2021

To: San Dieguito Union High School District

Turnkey Strategic Relations is pleased to provide a proposal for assistance with the recruitment and successful placement of a new Superintendent.

Turnkey is not a traditional search firm. Most firms source candidates from professional publications and networks, screen out less-prepared applicants, and summarize their resumes in preparation for the final interview. Turnkey has learned from personal experience that scouring candidates is not the key to a successful placement. Not even the most highly skilled Executive is right for every position. The key to successful placement is accurately assessing the organizational needs and culture, and then with meticulous detail, assessing the competencies, skills, and traits of the candidate for the perfect organizational match.

Accurate and detailed assessment of the organization and the candidate is key to San Dieguito Union High School District finding a successful Superintendent. Our team's local, national, and global experience as Executives and Executive coaches provide the unique abilities to make sure the district's reputation for excellence is advanced.

We appreciate the opportunity to submit a proposal for this especially important recruitment, and passionately believe we will exceed your expectations.

Regards,

A handwritten signature in blue ink, appearing to be "JP", written over a white background.

Jim Ponder  
CEO



## **Proposal for Superintendent Search Consultant**

Turnkey Strategic Relations proposes the following outline of services related to the San Dieguito Union High School Superintendent search. This proposal reflects work for the “light” option described in the RFP.

### **Proposed Scope**

#### **Competency Review – Position Description:**

Turnkey will work with the search committee and / or designated search firm to ensure that a clear and succinct description of the position and competencies is in place. We will utilize our competencies model to determine which competencies you want to see in the future Superintendent. After each competency is selected, it will be ranked to determine if it is critical for the Superintendent position - meaning it is one that must be possessed by a person to be considered "ready" for the position, or if it is desirable - meaning it is one that it would be great for the person to possess, but it is not necessary.

#### **Stakeholder Input:**

Working with the Board and /or their designated contact, Turnkey will collaborate to determine which stakeholder groups require additional due diligence. The best method of acquiring input will be identified and may include surveys, interviews, and group meetings.

#### **Board Alignment:**

Turnkey will work closely with the Board to ensure agreed upon strategy for recruitment, review, and selection.

#### **Resume / Application Review:**

Turnkey will review resumes / applications. Using an agreed upon criteria, we will separate applicants into three categories:

- Do not interview
- On the bubble
- Interview

Turnkey will assist in the development of candidate interview questions and structure.



### **Assessments for Final Candidates and Background Checks:**

Turnkey will administer a Work of Leaders assessment for each of the five final candidates. This assessment will provide insight as to the candidate's leadership style. Additionally, Turnkey will provide detailed background checks for the final five candidates.

### **Interview Participation:**

Turnkey will participate in the final five interviews, providing insight and feedback on the candidates.

### **Collaboration with Human Resources and the Board:**

Typically, an internal Human Resources department is well equipped to advertise a high-level position such as this one. We will collaborate to determine where the position should be listed / posted and which tool (such as ZipRecruiter) is best to facilitate the applicants. The recruitment tools and advertising shall be provided by the San Dieguito Union High School District.

### **Salary and Benefits Negotiation:**

Turnkey does not provide specific salary and benefit negotiation. We will, however, provide insight and recommendations to the Board based on our experience with Executives and Executive compensation.

### **Terms and Conditions:**

Total	\$78,500.00
\$31,400.00 due upon acceptance	
\$23,550.00 due sixty days after acceptance	
\$23,550.00 due 120 days after acceptance	

If required, travel, lodging, venue, food, and beverage provided by San Dieguito Union High School District.

### **Maximum Liability**

Total amount of work authorized under this statement of work is USD \$78,500.00 which is inclusive of reasonable and necessary out of pocket expenses incurred in connection with performance of the services.

TKSR shall work up to (and not beyond) any agreed budget as pre-authorized in the Statement of Work. Should TKSR's project work require additional budget for work requested by San Dieguito Union High School District, TKSR is responsible for communicating this budget restraint and getting prior written approval prior to proceeding with additional project work.



### **Intellectual Property:**

I acknowledge that the use of, including without limitation, any reproduction, presentation or commercial use of the concepts, strategies, methods, tools, and materials used in this program, which is the sole and exclusive intellectual property of Turnkey Strategic Relations, LLC., is prohibited without expressed written permission from Turnkey Strategic Relations, LLC.

### **Cancellation:**

A cancellation fee equal to the deposit amount will be charged in the event of a cancellation. Any cancellations must occur within 14 business days of commencement.

### **Disputes:**

Any dispute, controversy or claim arising out of or relating to this contract, including the formation, interpretation, breach, or termination thereof, including whether the claims asserted are suitable for arbitration, will be referred to and finally determined by arbitration in accordance with the JAMS International Arbitration Rules. The Tribunal will consist of one arbitrator. The place of arbitration will be San Diego California. The language to be used in the arbitral proceedings will be English. Judgment upon the award rendered by the arbitrator may be entered in any court having jurisdiction thereof.

### **Attorneys' Fees:**

The prevailing party shall have the right to collect from the other party its reasonable costs and necessary disbursements and attorneys' fees incurred in enforcing this Agreement.

### **STATEMENT OF WORK AUTHORIZATION**

<b>San Dieguito Union High School District</b>	<b>Turnkey Strategic Relations, LLC</b>
By:	By:
Name:	Name: Jim Ponder
Title:	Title: President and CEO, Turnkey Strategic Relations



### Addendum One - Team Bio's

Turnkey has a depth of talent when it comes to succession planning, employee assessment and strategic planning. The people and bios presented below will be working in some capacity on this project. It is possible that others will also be utilized.



Jim Ponder has over 28 years of experience as an entrepreneur, Consultant and Executive Coach.

Jim has worked closely with companies and organizations as they conduct CEO and Executive searches. He specializes in collaborating with traditional search organizations to ensure an outcome specific to the subject organization's immediate needs, future needs, and alignment with core values. Jim has served on many industry and non-profit Boards including The Boys and Girls Club, YMCA and the Multiple Sclerosis Society. He has assisted numerous companies with their transition / succession strategies.



As former City Manager for the City of Carlsbad and CEO of the United Way of San Diego County, Kevin's exceptional interpersonal skills and leadership proficiencies were the cornerstones of his success in teaming up with businesses, governments, nonprofit organizations, and communities to resolve the nation's most complex challenges.

Kevin provides C-suite Executives with high-level, strategic counsel with the utmost confidentiality.

Known for humble and egoless leadership, Kevin's reputation for management excellence has produced unprecedented performance shifts within a wide spectrum of organizations.



Kelly Mayberry's experience in Project Management allows her to seamlessly work with any size organization from small and mid-tier to Fortune 500.

Whether collaborating with in-house project managers and event personnel or providing full service, she makes working with Turnkey a pleasure.



## Addendum Two - References

Rancho Santa Fe Foundation

Christy Wilson

CEO

Phone: 858-822-8931

[christy@rsffoundation.org](mailto:christy@rsffoundation.org)

San Diego

Services Provided:

- Virtual Strategic Planning and Consulting
- CEO Search Consultation

GLOBALFOUNDRIES

Mike Cadigan

SVP Global Sales and Business Development

Phone: 845-892-5061

[Mike.cadigan@globalfoundries.com](mailto:Mike.cadigan@globalfoundries.com)

Services Provided:

- Global Organizational Development

Mental Health Cooperative

Pam Womack - CEO

615-726-3340

Nashville, TN

[pjwomack@mhc-tn.org](mailto:pjwomack@mhc-tn.org)

Services Provided:

- Succession Planning
- Organizational Development

Bergelectric

Kim Molzahn

Chief Human Resource Officer

Phone: 442-281-8201

San Diego CA and National offices

[kmolzahn@bergelectric.com](mailto:kmolzahn@bergelectric.com)

Services Provided:

- Organizational Development
- Board Consultation



**Addendum Three – sampling of who we have served.**

