



**BOARD OF TRUSTEES
SPECIAL MEETING**

Board of Trustees
Michael Allman
Melisse Mossy
Maureen "Mo" Muir
Katrina Young

Interim Superintendent
Lucile Lynch

**THURSDAY, SEPTEMBER 9, 2021
4:00 PM**

***Public participation will be remote and
live-stream will be available @ www.sduhsd.net.***

This meeting will be held in accordance with Executive Order N-29-20 and the County of San Diego Health and Human Services Order of the Health Officer and Emergency Regulations effective June 15, 2021. A copy of each order is available online at www.sduhsd.net and posted at 710 Encinitas Boulevard, Encinitas, CA. The meeting will be live-streamed and video recorded. The public live-stream link will be posted online at www.sduhsd.net prior to the start of the meeting. Members of the Board of Trustees will participate virtually/telephonically.

Public comments for special meetings are restricted to items on the agenda before the Board of Trustees for consideration. Members of the public who wish to address the Board of Trustees may do so by submitting a request using this online form available [here](#). This form will open at 3:45 p.m. on September 7, 2021, and will close at 2:00 p.m. on September 8, 2021. Public comment will be limited to two (2) minutes per speaker and a total of 20 minutes per item. If there are more than 10 requests for an item, there will be a random selection of 10 speakers made prior to the meeting that will be recorded.

Additional information and supporting documents that may be provided to the Board of Trustees prior to the start of the meeting, if provided, will be posted on the website at www.sduhsd.net.

AGENDA

1. **CALL TO ORDER**
 - a. WELCOME
 - b. PLEDGE OF ALLEGIANCE
2. **APPROVAL OF AGENDA**
3. **CONSIDERATION OF SELECTION OF SUPERINTENDENT SEARCH FIRM TO CONDUCT A CANDIDATE SEARCH FOR THE POSITION OF SUPERINTENDENT – *public comment, if any***
 - a. **REVIEW OF SUPERINTENDENT SEARCH FIRM PROPOSALS & SELECTION OF SEARCH FIRM(S) TO MAKE PRESENTATION**

****At approximately 5:00 pm, the Board will begin with Item 3b.***

- b. **SEARCH FIRM PRESENTATIONS**
 - c. **DELIBERATION & SELECTION OF A SUPERINTENDENT SEARCH FIRM**
 - d. **CONSIDERATION OF APPROVAL OF ENTERING INTO AN AGREEMENT**
4. **ADJOURNMENT**

In compliance with the Americans with Disabilities Act, if you need special assistance, disability-related modifications, or accommodations, including auxiliary aids or services, in order to participate in the public meetings of the District's Governing Board, please contact the [Office of the Superintendent](#). Notification 72 hours prior to the meeting will enable the District to make reasonable arrangements to ensure accommodation and accessibility to this meeting. Upon request, the District shall also make available this agenda and all other public records associated with the meeting in appropriate alternative formats for persons with a disability.

MEETING PROTOCOL

Board Bylaw 9323 Meeting Conduct

The members of the San Dieguito Union High School District Board of Trustees are locally elected officials, serve four-year terms of office, and are responsible for the schools' educational programs, in grades seven through twelve. The Board is a policy-making body whose actions are guided by the District's vision, mission, and goals. Administration of the District is delegated to a professional administrative staff led by the Superintendent. Board Members are required to conduct the programs of the schools in accordance with the Constitution of the State of California, the California Education Code, and other laws relating to schools enacted by the Legislature, in addition to policies and procedures adopted by the Board of Trustees.

PUBLIC COMMENTS (*Please see public comment process noted above.*)

Members of the public are entitled to comment on items listed on the agenda for Board consideration or deliberation. At the discretion of the Board President, members of the public are entitled to speak on agenda items either immediately after the item is called or following background information provided related to the item. Members of the public are entitled to comment on an agenda item only once at any meeting and may not have someone speak or read on their behalf unless otherwise allow by statute. Although the Board President may seek additional information, participation in debate on any item before the Board shall be limited to the Board and staff. The Board President shall determine the order of speakers, when the Board President calls a member of the public to speak they are asked, but not required, to provide their names prior to making comments.

PUBLIC INSPECTION OF DOCUMENTS

In compliance with Government Code 54957.5, agenda-related documents that have been distributed to the Board less than 72 hours prior to the Board Meeting will be available for review on the district website, www.sduhsd.net, and/or at the district office. Please contact the [Office of the Superintendent](#) for more information.

CLOSED SESSION

The Board may meet in Closed Session to consider qualified matters of litigation, employee negotiations, student discipline, employee grievances, personnel qualifications, and/or real estate negotiations which are timely.

San Dieguito Union High School District

INFORMATION REGARDING BOARD AGENDA ITEM

TO: BOARD OF TRUSTEES

DATE OF REPORT: September 7, 2021

BOARD MEETING DATE: September 9, 2021

PREPARED & SUBMITTED BY: Lucile Lynch, Interim Superintendent

SUBJECT: CONSIDERATION OF SELECTION OF SUPERINTENDENT SEARCH FIRM TO CONDUCT A CANDIDATE SEARCH FOR THE POSITION OF SUPERINTENDENT

EXECUTIVE SUMMARY

At the September 3, 2021 Special Board meeting, the Board approved Option 2, a new proposed timeline, subject to availability and guidance of a selected search firm, to appoint and approve entering into a contract with a new superintendent at the October 14, 2021 Regular Board Meeting. The deadline to receive proposals from search firms was at 5:00 pm on September 3, 2021 and five proposals were received by the deadline. One proposal was resubmitted after the deadline and the search firm has requested the Board's consideration of the late resubmission.

At this meeting, the Board will review search firm proposals, select search firm(s) to make a presentation and be interviewed, search firms will make a presentation, and the Board will consider selecting a search firm and approve entering into a contract. A special board meeting is scheduled on September 13, 2021 at 10:00 am to meet with the selected search firm for planning purposes.

RECOMMENDATION:

It is recommended that the Board consider the following:

- a. Review search firm proposals and select search firm(s) to make a presentation; and
- b. Search firm(s) selected will make a presentation and be interviewed; and
- c. Deliberate and select a search firm to conduct a candidate search for the position of Superintendent; and

ITEM 3

- d. Approve entering into an agreement with _____, to conduct a candidate search for the position of Superintendent of the San Dieguito Union High School District, during the period September 10, 2021 until the project is complete, in an amount not to exceed \$_____, to be expended from the General Fund/Unrestricted 01-00, and authorize Lucile Lynch or Tina Douglas to execute all pertinent documents as necessary.

FUNDING SOURCE:

General Fund/Unrestricted 01-00

JGCONSULTING

PROPOSAL

San Dieguito Union High School District

Superintendent Search Services



June 7, 2021

CONTENTS

CONTENTS 2

MEMORANDUM 3

INTRODUCTION & BACKGROUND 4

SUPERINTENDENT EXECUTIVE SEARCH: WORK PLAN 5-6

SUPERINTENDENT EXECUTIVE SEARCH: PROPOSED TIMELINE 7

EXPERIENCE: CONSULTANTS 8

SUPERINTENDENT SEARCH REFERENCES: SCHOOL DISTRICTS 9-10

SUPERINTENDENT EXECUTIVE SEARCH: COST 10

ADDITIONAL SERVICES: PROFESSIONAL DEVELOPMENT 12

MEMORANDUM

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

P: (888) 765-3731

C: (214) 934-5537

E: james@jgconsulting.us

Corporate Office:

3616 Far West Blvd., Ste. 117-586

Austin, TX 78731

INTRODUCTION & BACKGROUND

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).

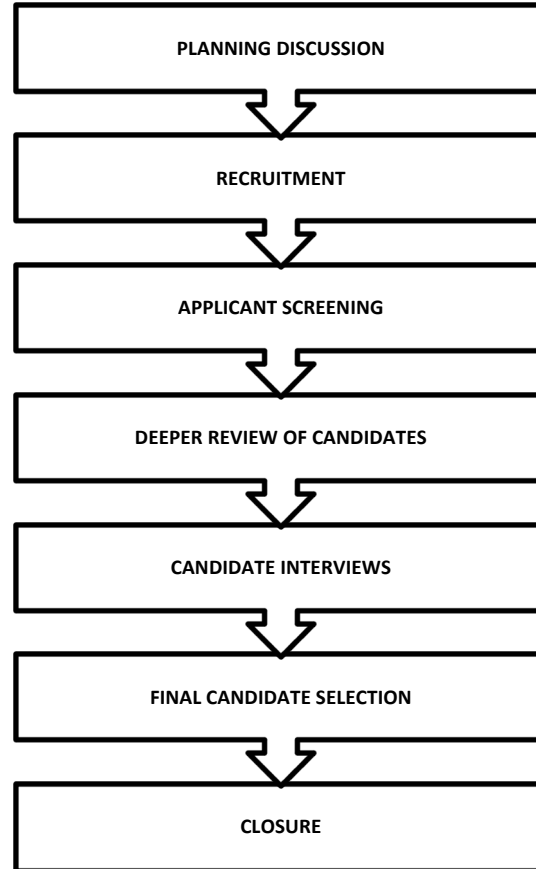
JG Consulting is committed to working in any district seeking to recruit talented educators.

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.

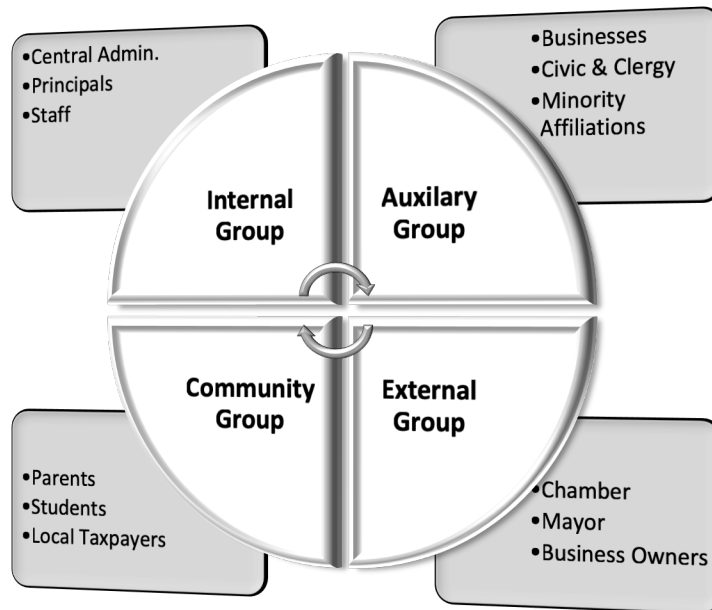
- Arrange for candidate district visits, if applicable. At the request of the Board.

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 Meetings¹



¹ 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

Proposed Activities	Proposed Timelines¹
1. Planning discussion to initiate the Superintendent search with each Trustee	June
2. Internal and External Community-related meetings: a. <u>July – August</u> ² ; 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 <ul style="list-style-type: none"> 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.**

¹ All dates will be aligned to meet the deliverables of the Board.

² In-person engagement meetings are contingent upon current pandemic restrictions.

EXPERIENCE: CONSULTANTS

JG Consulting **experience.**

Consulting Team Information:

James Guerra
President & CEO
Corporate Office:
3616 Far West Blvd., Ste. 117-586
Austin, TX 78731
P: (888) 765-3731
C: (214) 934-5537
E: james@jgconsulting.us

Dr. Jose Leyba
Senior Search Consultant
P: (480) 620-2480
E: leyba.jose@gmail.com

Lizzy Carol
Administrative Chief
P: (512) 202-7278
E: lizzy@jgconsulting.us

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

Austin Independent School District
Geronimo Rodriguez, Board President
 4000 S. IH-35 Frontage Road
 Austin, TX 78704
 P: (512) 414-1700
 E: geronimo4aisd@gmail.com
Superintendent Search: 80,100 Students
Placed: Dr. Stephanie Elizalde

San Marino Unified School District
Shelley Ryan, Board President
 1665 West Drive
 San Marino, CA 91108
 P: (626) 299-7010
 E: sryan@smusd.us
Superintendent Search: 4,400 Students
Placed: Dr. Jeff Wilson

Washoe County School District
Dr. Angela Taylor, Board President
 425 East Ninth Street
 Reno, NV 89512
 P: (775) 348-0200
 E: ataylor@washoeschools.net
Superintendent Search: 64,000 Students
Placed: Dr. Kristen McNeill

East Baton Rouge Parish Public School System
Mike Gaudet, Board President (former)
 1050 S. Foster
 Baton Rouge, LA 70806
 P: (225) 229-5584
 E: mgaudet@ebrschools.org
Superintendent Search: 41,000 Students
Placed: Dr. Sito Narcisse

Lamar Consolidated Independent School District
Joy Williams, Board President
 3911 Avenue I
 Rosenberg, TX 77471
 P: (832) 489-5191
 E: joy.williams@lcsisd.org
Superintendent Search: 36,000 Students
Placed: Dr. Roosevelt Nivens

San Benito Consolidated Independent School District
Orlando Lopez, Board President
 240 N. Crockett Street
 San Benito, TX 78586
 P: (956) 241-1276
 E: olopez@sbcisd.net
Superintendent Search: 11,000 Students
Placed: Dr. Nate Carman

Hutto Independent School District
Terrence Owens, Board Vice President
 200 College Street
 Hutto, TX 78634
 P: (512) 759-3771
 E: terrence.owens@huttoisd.net
Superintendent Search: 8,000 Students
Placed: Dr. Celina Estrada Thomas

Victoria Independent School District
Tami Keeling, Board President
 102 Profit Drive
 Victoria, TX 77901
 P: (361) 935-5142
 E: tami.keeling@hotmail.com
Superintendent Search: 14,000 Students
Placed: Dr. Quintin Shepherd

Crosby Independent School District
Tanya Eagleton, Board President
 706 Runneburg
 Crosby, TX 77532
 P: (281) 917-6328
 E: tanya.eagleton@yahoo.com
Superintendent Search: 6,000 Students
Placed: Paula Patterson

DeSoto Independent School District
Carl Sherman, Jr. Board President (former)
 200 E. Belt Line Road
 DeSoto, TX 75115
 P: (972) 595-4510
 E: carl.sherman@desotoisd.org
Superintendent Search: 9,000 Students
Placed: Dr. D'Andre Weaver

SUPERINTENDENT SEARCH REFERENCES: SCHOOL DISTRICTS

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

Corporate Office:

3616 Far West Blvd., Ste. 117-586

Austin, TX 78731

P: (888) 765-3731

C: (214) 934-5537

E: 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 Plan³

Description	Details	Total Estimate⁴
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.

³ 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.

⁴ 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  JACOBSON, LLC
EXECUTIVE RECRUITMENT & DEVELOPMENT



Phone: 888-375-4814
Email: mail@macnjake.com
Website: www.macnjake.com

ITEM 3

TABLE OF CONTENTS

<i>Letter of Interest</i>	3
<i>About McPherson & Jacobson</i>	5
<i>The McPherson & Jacobson Difference</i>	5
<i>Qualifications and Background of McPherson & Jacobson, L.L.C.</i>	5
<i>McPherson & Jacobson, L.L.C. Equity Policy</i>	6
<i>Applicant Diversity</i>	7
<i>California Experience</i>	8
<i>What Board Members Say About the Service of McPherson & Jacobson, L.L.C.</i>	8
<i>Selected References</i>	12
<i>California Searches Conducted by McPherson & Jacobson, L.L.C.</i>	13
<i>Transparency—The McPherson & Jacobson Difference</i>	17
<i>California Consultants</i>	19
<i>Search Process</i>	20
<i>Executive Summary</i>	20
<i>Five Phases of a Superintendent Search</i>	21
<i>Phase I—Initiating the Search Process</i>	22
<i>Phase II—Stakeholder Input, Advertising the Position, Recruiting Applicants</i>	22
<i>Phase III—Applicant Screening</i>	24
<i>Phase IV—Reviewing Candidates with the Board, Interviews</i>	25
<i>Phase V—Transition with Success</i>	27
<i>Recruiting, Identifying, and Screening Applicants</i>	28
<i>Advertising the Position</i>	28
<i>Identifying and Recruiting Applicants</i>	28
<i>Applicant Diversity</i>	29
<i>Screening, Reference Checks, Interviews of Final Applicants</i>	29
<i>Timeline</i>	31
<i>Responsibilities of San Dieguito Union High School District and McPherson & Jacobson, L.L.C.</i>	32
<i>Communicating and Working with the Board</i>	35
<i>Stakeholder Involvement</i>	35
<i>Consultants for Search</i>	38

ITEM 3

Cost Proposal..... 42
Investment..... 42
Price Breakdown for Search Activities 44

This proposal is the property of McPherson & Jacobson L.L.C. and has been prepared at the request of the San Dieguito Union High School District, Encinitas, California. The contents of this proposal are not to be reproduced or distributed for any reason other than for use by the San Dieguito Union High School District, Encinitas, California.

08/21

Letter of Interest



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



888-375-4814 ♦ Email: mail@macnjake.com ♦ Website: www.macnjake.com

August 23, 2021

Board of Trustees
San Dieguito Union High School District
710 Encinitas Boulevard
Encinitas, California 92024

Thank you for the opportunity to respond to your RFP. 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.

ITEM 3

Our contact information:

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

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

Sincerely,

Thomas Jacobson

Thomas Jacobson Ph.D.
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 870 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 125 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,

ITEM 3

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, **almost eighty 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. **Over 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.

ITEM 3

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 125 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



www.facebook.com/hemetunified



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>
Date: Wed, Aug 12, 2020 at 1:24 PM
Subject: Re: Follow-up
To: Ben Johnson <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.

From: Wendy Sims-Moten <wsimsmoten@sbunified.org>
Date: August 13, 2020 at 12:41:34 PM PDT
To: Ben Johnson <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."

ITEM 3

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

ITEM 3

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

ITEM 3

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

ITEM 3

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

Whittier City School District, Whittier
Search Year: 2021/22, Enrollment: 6,300

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 3

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

Search Process

Executive Summary

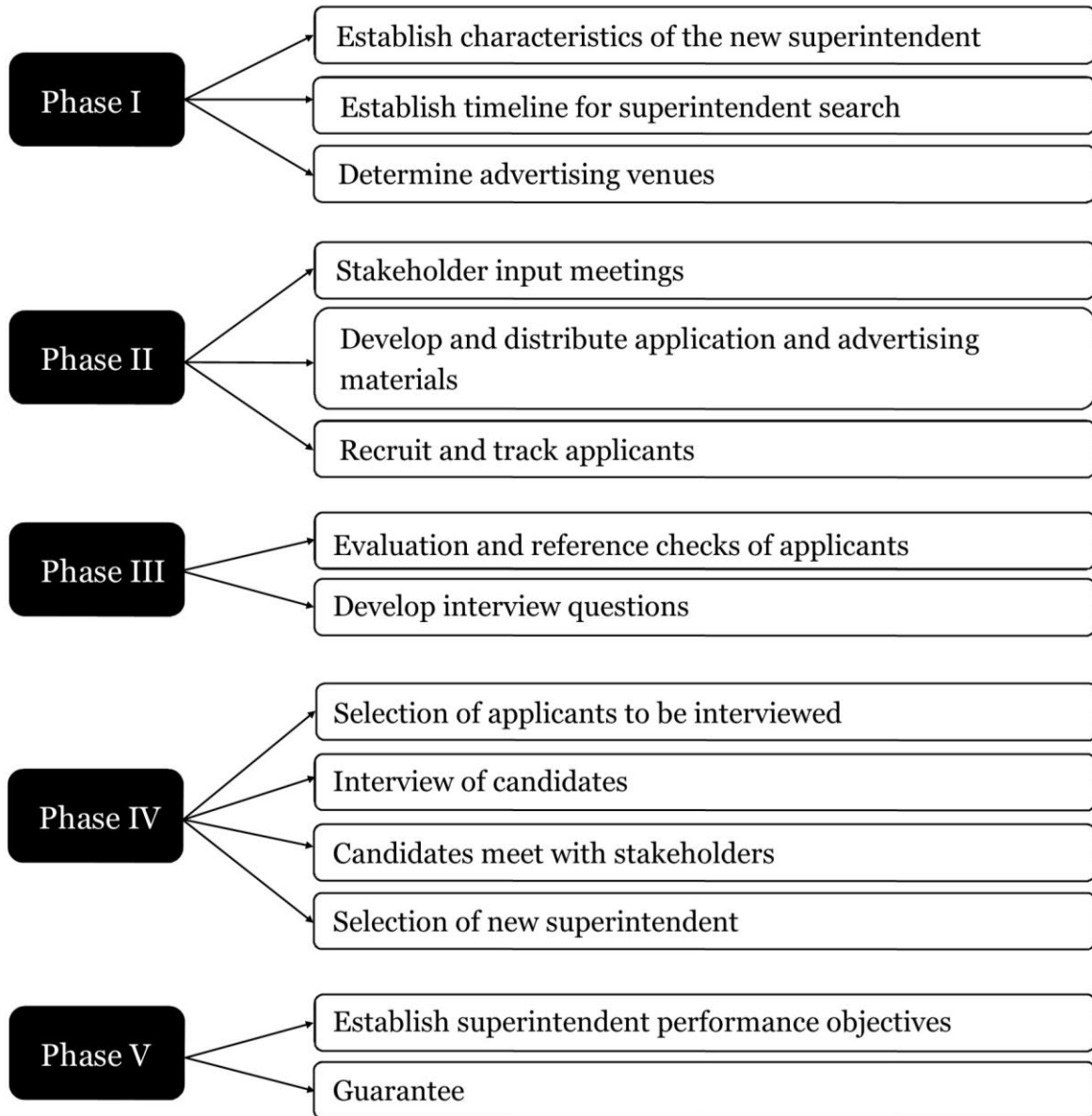
McPherson & Jacobson L.L.C. provides a comprehensive search process. Below are some of the highlights of our process:

- 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.***

ITEM 3

Five Phases of a Superintendent Search



ITEM 3

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.

ITEM 3

✓ **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) 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.

ITEM 3

✓ **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

ITEM 3

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

ITEM 3

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.

ITEM 3

✓ **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: AASA, *TopSchoolJobs.org*, ALAS (Association of Latino Administrators & Superintendents), and NABSE (National Alliance of Black School Educators). .

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.

ITEM 3

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.

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

ITEM 3

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 (**September 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 (**October 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 (**November 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 (**December 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 (**January 2022**)
 - Semi-finalist interviews are conducted (if chosen by the board)
 - The board interviews its final candidates
 - The board selects their new superintendent
 - A criminal/financial/credential verification background check is conducted on the selected candidate
 - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

ITEM 3

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

Event	McPherson & Jacobson's Tasks	School District's Tasks
1 st board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> The consultant guides the board in determining the following items <ul style="list-style-type: none"> o Characteristics for the new superintendent o The search calendar o Compensation parameters o Identify the appropriate constituent groups for stakeholder input o Advertising venues <input type="checkbox"/> The consultant works with the Point of Contact to compile: <ul style="list-style-type: none"> o Information to create the brochure announcing the vacancy o The list of names to be invited to the community input meetings 	<ul style="list-style-type: none"> <input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the Board Contact List <input type="checkbox"/> Reviews and approves the brochure
After 1 st meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Application link is posted online <input type="checkbox"/> Brochure announcing the vacancy is created <input type="checkbox"/> Advertising is started <input type="checkbox"/> Vacancy announcements are sent out <input type="checkbox"/> E-mails are sent to applicants registered with McPherson & Jacobson notifying them about the opening <input type="checkbox"/> E-mails are sent to consultants regarding the opening, requesting they invite candidates to apply for the position <input type="checkbox"/> Opening is posted on social media and additional venues 	<ul style="list-style-type: none"> <input type="checkbox"/> Edit the brochure
During application period	<ul style="list-style-type: none"> <input type="checkbox"/> Consultants recruit candidates that fit the position <input type="checkbox"/> Monitors applicants and where they are in the application process <input type="checkbox"/> Notifies applicants of the closing date for submitting their materials <input type="checkbox"/> Lead consultant keeps the board up to date on the search 	<ul style="list-style-type: none"> <input type="checkbox"/> Posts a link to the McPherson & Jacobson website <input type="checkbox"/> Posts the brochure (announcement of vacancy) on their website <input type="checkbox"/> Advertises the opening on the district's social media platforms

ITEM 3

Event	McPherson & Jacobson's Tasks	School District's Tasks
Stakeholder meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Home Office sends out invitations to the community stakeholder meeting(s) after receiving the information from the consultant and the district 	<ul style="list-style-type: none"> <input type="checkbox"/> Assists in organizing stakeholder focus groups and meeting schedule <input type="checkbox"/> Names and addresses are sent to Home Office for community meeting invitations <input type="checkbox"/> Posts meeting dates, times, and locations as open public forum <input type="checkbox"/> Assists in translating stakeholder input survey into the additional language(s) requested by the school district
Stakeholder meetings	<ul style="list-style-type: none"> <input type="checkbox"/> Consultants facilitate the stakeholder meetings, recording the input <input type="checkbox"/> An online stakeholder input survey is created, the link is posted on the McPherson & Jacobson website and also provided to the district to post 	<ul style="list-style-type: none"> <input type="checkbox"/> Link to online stakeholder input form(s) is (are) posted on the school district website
Stakeholder meetings completed	<ul style="list-style-type: none"> <input type="checkbox"/> Consultant summarizes key themes and gives the results to the district <input type="checkbox"/> Copy of summary is sent to Home Office <input type="checkbox"/> The stakeholder input summary report is created 	<ul style="list-style-type: none"> <input type="checkbox"/> "Stakeholder Input Report" is posted on the school district website
2 nd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Review stakeholder input summary report and provide copies to the district <input type="checkbox"/> The consultant guides the board in determining the following items <ul style="list-style-type: none"> o Interview questions o Length of contract, moving and interview expenses o Spouse/significant other's involvement in interview process o District Interview Schedule o Candidate Daily Interview Schedule <input type="checkbox"/> Interview questions are sent to Home Office to be formatted 	
Prior to 3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Applicant packets are reviewed by the consultants and reference checks are performed <input type="checkbox"/> Contact candidates on short list and verify their interest in the position <input type="checkbox"/> Meet with stakeholder group chairs to review schedule, procedures, and screen questions 	

ITEM 3

Event	McPherson & Jacobson's Tasks	School District's Tasks
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> The consultant facilitates the board's <ul style="list-style-type: none"> o Review of the list of all applicants o Overview of candidates on short list o Selection of finalists o Finalizing of interview dates & schedule o Review of interview questions & procedures o Finalizing candidate & spouse/significant other arrangements <input type="checkbox"/> Contact finalists and schedule interview dates, review schedule, discuss compensation and contractual issues <input type="checkbox"/> Work with Point of Contact to coordinate interviews (transportation, lodging, interview locations, etc.) <input type="checkbox"/> Send Candidate Daily Interview Schedule to each finalist <input type="checkbox"/> Notify the applicants who were not selected to be interviewed 	<ul style="list-style-type: none"> <input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> Call Point of Contact after 1st interview to learn how it went <input type="checkbox"/> Call 1st candidate to learn their perspective and how the interview went <input type="checkbox"/> Suggest any possible improvements <input type="checkbox"/> Be available for questions <input type="checkbox"/> Be present at interviews if request is made by school district 	<ul style="list-style-type: none"> <input type="checkbox"/> One candidate per day <input type="checkbox"/> Board member greets each candidate upon arrival to district <input type="checkbox"/> Informal interview-social setting <input type="checkbox"/> Formal interview <input type="checkbox"/> Spouse/significant other's visitation is coordinated
Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Call and make offer to candidate <input type="checkbox"/> Verify acceptance <input type="checkbox"/> Conduct criminal/financial/credential verification check on selected candidate <input type="checkbox"/> Call other finalists <input type="checkbox"/> Sends out letter of congratulations to candidate who was chosen 	<ul style="list-style-type: none"> <input type="checkbox"/> Board meets and discusses each candidate individually <input type="checkbox"/> Read input forms submitted by stakeholder input groups <input type="checkbox"/> Have each board member rank order candidates <input type="checkbox"/> Select minimum of #1 and #2 candidate <input type="checkbox"/> Call and make offer to candidate <input type="checkbox"/> Send interview forms and files to the Home Office <input type="checkbox"/> Board evaluates our services
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Facilitate board and superintendent's identification of 2-3 performance objectives and evidence of progress the board will accept <input type="checkbox"/> Consultant reviews superintendent's plan 	<ul style="list-style-type: none"> <input type="checkbox"/> Superintendent creates plan with target objectives and timelines <input type="checkbox"/> Plan is sent to consultant to be reviewed <input type="checkbox"/> Board adopts plan

ITEM 3

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 870 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.

ITEM 3

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.

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

Process for Including Ethnically Diverse Communities

McPherson & Jacobson will work with the district to determine the best practices to obtain input from ethnically diverse communities in the district. If in-person meetings are required, McPherson & Jacobson will work with the district to obtain the necessary translators.

ITEM 3

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

Dates	Title	District	Location	Enrollment
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

ITEM 3

Professional Organization Memberships

Name of Organization	Offices Held
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 was 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

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

Community/Service/Fraternal Organizations

Name of Organization	Dates	Offices Held
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

ITEM 3

Sigma Alpha Epsilon Alumni Association	1993	to	Present	Advisory Board
California Association of Healthcare Purchasing and Material Management				Member
Western States Healthcare Materials Management Association				Member
HMFA				Member
ACHE				Vice-Chairman Inland Empire Chapter

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 fee for conducting the superintendent search is \$22,000 for Phases I-V.

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

The total not to exceed amount including expenses is \$28,700

Included in the expenses is

- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin
- Two (2) days in-person stakeholder meetings
- Online stakeholder input surveys
- Video interviews of candidates
- Criminal/financial/credential verification background check for the final candidate
- Travel expenses for two (2) consultants to travel to the district for the scheduled meetings
- Office expenses

***If the district chooses to do parts of the search using online meetings, the expenses may decrease.*

NOTE:

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

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

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.

ITEM 3

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.

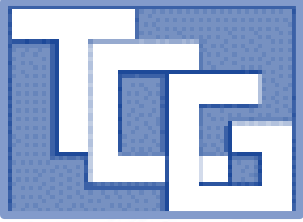
ITEM 3

Price Breakdown for Search Activities

Phase	Description of Services	Fee	Expenses
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$ 4,500	\$ 2,150
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$ 6,000	\$ 350
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$ 6,000	\$ 200
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.	\$ 4,500	\$ 350
V	Meet with the board to determine the superintendent performance objectives.	\$ 1,000	\$ 150
Totals		\$22,000	\$3,200
	Total (excluding travel)*	\$25,200	
	Total (including consultant travel for four (4) trips to the district)	\$28,700	

*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.



A SUPERINTENDENT SEARCH PROPOSAL

PREPARED FOR

SAN DIEGUITO HIGH SCHOOL DISTRICT

Board of Trustees

**Board President, Maureen Muir
Board Vice President, Melisse Mossy
Board Clerk, Katrina Young
Board Member, Michael Allman
Board Member, Vacant**

September 3, 2021



TABLE OF CONTENTS

The following content has been purposefully customized for the San Dieguito Union High School District.

LETTER OF INTRODUCTION.....	3
ABOUT COVID-19	4
WHY TCG.....	5
ABOUT TCG	6
PERSONNEL	8
TCG METHODOLOGY	9
THE TCG 5 STEP PROCESS	12
TIMELINE	12
FOCUS ON THE BOARD/SUPERINTENDENT RELATIONSHIP	16
5 MOST RECENT SUCCESSFUL RECRUITMENTS	16
REFERENCES	17
TESTIMONIALS.....	17
COST ANALYSIS	20
SAMPLE AGREEMENT.....	21
PARTIAL CLIENT LIST	23
RESUME ABSTRACT: DR. JAN BRITZ.....	24
RESUME ABSTRACT: DR. STEVE KENNEDY.....	25
ADDENDUM ITEMS.....	26

3.

ITEM 3

September 3, 2021

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

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

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

TCG (The Cosca Group) is proud to be recognized for delivering much more than the mechanics involved in a typical search. Our technique is purposefully inclusive, our strategy is comprehensive, and our consultants are personally engaged. As a result, our consultants are equipped to provide exceptionally well-informed advice and services. We are not the largest firm or the most prolific firm; our focus is on delivering service that is second to none.

A distinct benefit of our client-centered approach is that it substantially contributes to building confidence in the Board and its new superintendent and establishing the effective stakeholder relationships so important for successfully serving the needs of your students, parents, staff and community.

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

It is our pleasure to offer the services of Dr. Jan Britz, TCG Partner, and Dr. Steve Kennedy as your search team. They are both widely recognized for their successful careers, particularly their expertise in Board/superintendent relations and district governance. Moreover, with their extensive experience in all levels of public education, each is uniquely prepared to recognize the unique aspects of your school district. We have included resume briefs on pages 24 to 25 to underscore their capacity to meet your needs, and they will also have access to the resources and expertise of the entire TCG membership.

For more information, please visit www.TheCoscaGroup.com or contact Dr. Jan Britz at janbritz3240@gmail.com or 805.796.9772. We look forward to presenting the unique aspects of our proposal to you.

Thank you for your consideration. It would be an honor to work with you.

Sincerely,



Joel Shapiro
President
The Cosca Group



Dr. Jan Britz
Partner
The Cosca Group

enc

ABOUT COVID-19

Adapting the Recruitment Process to the Coronavirus Pandemic

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

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

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

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

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

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

Virtually collecting stakeholder input was equally as successful.

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

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

5.

ITEM 3

WHY TCG

Not the largest firm. Simply service second to none.

PERSONALIZED

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

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

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

COMPREHENSIVE

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

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

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

INCLUSIVE

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

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

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

6.

ITEM 3

ABOUT TCG

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

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

HISTORY

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

PHILOSOPHY

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

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

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

QUALIFICATIONS AND EXPERIENCE

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

7.

ITEM 3

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

SPECIAL ATTRIBUTES

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

COMMITMENT AND SERVICE

TCG commitment and attention to every detail is unsurpassed.

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

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

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

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

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

PERSONNEL

We are pleased to offer Dr. Jan Britz and Dr. Steve Kennedy as the TCG search consultants for your district.

Dr. Britz has served as a professional educator for 40 years. She has taught from grades six through college with concentration in secondary mathematics classes. In Simi Valley Unified School District, she held the following positions: junior high school assistant principal, middle school principal and high school principal. She then served as assistant superintendent and superintendent in Burbank Unified School District. She served twenty-eight years as an administrator in secondary education.

Dr. Britz also served as an adjunct professor at California Lutheran University, Moorpark Community College and California State University, Northridge. Furthermore, she has taught Leadership classes at professional conferences and colleges. Jan has been recognized with awards for her work as an administrator from ACSA and others from Ventura County, as well as community groups and parent organizations.

Dr. Steve Kennedy is a recently retired Superintendent and veteran educator with over 32 years in the K-12 education space. While his career trajectory began as a classroom teacher and school principal, he was soon thriving in positions at the district level, Assistant Superintendent for Personnel and Superintendent for the Menifee Union School District in Southwest Riverside County. Known for his keen insight in the areas of personnel management, business services, fiscal management, labor negotiations, union relations and school leadership development, Dr. Kennedy found tremendous success leading a growing school organization, and navigating multiple successful school bond campaigns to address unprecedented growth. Among his proudest accomplishments across a career strewn with educational accolades, is his lifelong passion to develop and place talented, capable, and truly compassionate district leaders in positions where they will thrive to further his mission of sustaining maximized levels of student learning and achievement. Dr. Kennedy understands that community leadership is a critical component to each community's quality of life. His involvement in community leadership is reflected by his service in such positions as President of the Rotary Club of Menifee, Past-Chair of the San Diego Zoological Society's Education Board, Founding Board Member for the Boys and Girls Club of the Inland Valley, Board Member for Project L.I.F.T., and a regular volunteer at Father Joe's Village in San Diego. Recognized as a leader with tremendous vision and heart, Dr. Steve Kennedy brings his passion for learning and organizational excellence to the consulting world to further this outstanding work.

Their resume abstracts are provided as pages 24 and 25.

TCG METHODOLOGY

TRANSPARENCY

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

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

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

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

COMMUNITY INPUT STRATEGY

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

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

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

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

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

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

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

COMPREHENSIVE STAKEHOLDER INCLUSION

TCG's standard practice is a thorough, personally managed, three-step input collection process.

Step 1. Consultants will meet with the Board and identify the district's strengths and needs/critical issues. Based on those strengths and needs/critical issues, identify the characteristics desired in the new Superintendent. The Board will also identify groups and individuals representing community members, students, parents, teachers, classified employees, administrators, etc. to provide input to TCG, and recommend custom strategies to engage all representative communities within the district, including its non-English-proficient constituents.

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

Step 3. Consultants will meet with the Board to review and analyze stakeholder input, thereby providing an opportunity to reexamine, modify and prioritize its identified lists of district strengths, needs/critical issues, and preferred characteristics of a new superintendent. Based on the Board's findings, consultants develop an electronic brochure to be presented to the Board for final approval.

SCREENING AND BACKGROUND CHECKS

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

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

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

CONFIDENTIALITY

While TCG standard practice is to conduct an open and transparent search process, maintaining applicant confidentiality is central to attracting top candidates; as a result, the names of all applicants are kept confidential until the Board publicly announces a finalist for the position. The procedure may be adapted to accommodate unique Board needs and preferences.

11.

ITEM 3

DISTRICT CONTACT(S)

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

ASSISTANCE REQUIREMENTS

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

SEARCH SCOPE

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

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

INTERVIEW QUESTIONS

TCG's standard practice is to develop questions in collaboration with the Board, with the Board determining the final selection.

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

WRITING SAMPLE

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

GUARANTEES

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

12.

ITEM 3

“The Cosca Group and its two consultants who have led this search realize their task goes far beyond the duties of headhunters. Public education, the foundation of American values, relies on the participation of all community members.

The Cosca Group asserts its belief system just below its letterhead,

. “We believe that education is a cooperation of family, school, and community and that all children deserve the opportunity for success in school’.”

By: Larry Lowery, Staff

The Community Voice Newspaper

Rohnert Park-Cotati-Penngrove

THE TCG 5 PHASE PROCESS

(TO BE CUSTOMIZED FOR THE DISTRICT)

TIMELINE

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

PHASE I: PRE-RECRUITMENT	September 16 - October 28
PHASE II: RECRUITMENT	October 11 - November 15
PHASE III: INTERVIEWS	November 15 – November 24
PHASE IV: APPOINTMENT OF SUPERINTENDENT	December 14
PHASE V: OPTIONAL SUPPORT SERVICES	Two Year

PHASE I

PRE-RECRUITMENT

TCG Meets with the Board

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

TCG Collects Stakeholder Input

- ◆ Organize and personally attend individual and group meetings
- ◆ Arrange convenient input alternatives, such as online surveys
- ◆ Compile all input into a full report for the Board

TCG Meets with the Board

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

TCG Develops and Implements the Recruitment Plan

- ◆ Develop marketing brochure for Board approval
- ◆ Arrange advertisements, including but not limited to EdCAL
- ◆ Prepare announcement distribution
- ◆ Contact the 24 TCG partners for recommendations and referrals
- ◆ Arrange email announcement to the 1000+ California superintendents

TCG Conducts a Superintendent Compensation Study (Optional)

TCG Provides Periodic Status Reports

14.

ITEM 3

PHASE II RECRUITMENT

TCG Organizes and Maintains Search Records

TCG Handles All Applicant Communication

TCG Screens All Applicant Submissions

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

TCG Conducts Extensive Background and Reference Checks

TCG Organizes a Panel of Experts to Identify Most Qualified Applicants

TCG Develops a Comprehensive Candidate Report for the Board

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

TCG Provides Periodic Status Reports

PHASE III INTERVIEWS

TCG Meets with the Board

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

TCG Schedules Interviews

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

PHASE IV APPOINTMENT OF NEW SUPERINTENDENT

TCG Facilitates Culmination and Final Board Approval

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

PHASE V SUPPORT

TCG Optional Services

Included in Fee

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

FOCUS ON THE BOARD/SUPERINTENDENT RELATIONSHIP

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

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

5 MOST RECENT SUCCESSFUL RECRUITMENTS

- ◆ Marysville Joint Unified School District
 - ◆ Taft Union High School District
 - ◆ Keppel Union School District
- ◆ Mammoth Unified School District
 - ◆ Rosemead School District

17.

REFERENCES

TCG recently concluded an executive search conducted virtually for the Taft Union High School District and Keppel Union School District.

Paul Linder, Board President
Taft Union High School District
701 Wildcat Way
Taft, CA 93268
plinder@taft.org
(661) 319-5804

Dominique Ballante, Board President
Keppel Union School District
34004 128th Street East
Pearblossom, CA 93553
dballante@keppel.k12.ca.us
(661) 269-6599

TCG is also pleased to offer the following references:

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

John Stavlo Board President
Mammoth Unified School Dist.
462 Sierra Park Road
Mammoth, CA 93546
(760) 934-5674

Peggy Foster, Board President
Eastside Unified School District
45006 39th street
Lancaster, CA 93535
(661) 350-2553

Nancy Armenta, Board President
Rosemead Unified School District
3907 Rosemead Blvd.
Rosemead, CA 91770
(626) 632-1398

TESTIMONIALS

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

Board of Education
San Bernardino City Unified School District

“ . . . we found our association with The Cosca Group to be a very successful experience.”

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

18.

ITEM 3

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

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

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

Jannie Dutton
President, Board of Trustees
Keppel Union School District

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

Peggy Foster
Board President
Eastside Union School District

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

Samuel Blanco III
Board President

"Our district and community have nothing but the utmost respect and praise for the work they did for us."

Lucy Rangel
President of the Board
Fillmore Unified School District

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

D. Don Revelo
School Board President
Millbrae School District

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

Brian Clapper
Board President
National School District

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

Martin J. Hranek, Trustee

19.

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

Elisabeth C. Ellers
Board President
South Pasadena Unified School District

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

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

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

The end result of their process was outstanding."

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

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

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

COST ANALYSIS

A total fee of \$23,500 is based on a search design specific to the San Dieguito Union High School District inclusive of the services and expenditures described in this search proposal dated September 3 2020. Said fee includes, but not limited to:

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

SAMPLE AGREEMENT

The San Dieguito Union High School District and The Cosca Group

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

I.

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

II.

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

III.

1. CONSULTANT, upon notice to proceed from the DISTRICT, shall provide to the DISTRICT such special services and advice, more particularly as set forth in the Proposal presented to the DISTRICT on September 3, 2021, which is incorporated by reference herein.

2. In consideration of the foregoing, DISTRICT shall pay CONSULTANT A FEE NOT TO EXCEED \$23,500 CONSULTANT shall invoice DISTRICT in three installments as follows:

- (1) \$7,833.00 at the time of the development and presentation of the profile.
- (2) \$7,833.00 at the presentation of a slate of final candidates.
- (3) \$7,834 at the appointment of the new superintendent.

Terms of payment shall be net 45 days.

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

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

22.

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

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

FOR: The San Dieguito Union High School District

Date: _____

By: _____
Signature
Maureen Muir, Board President

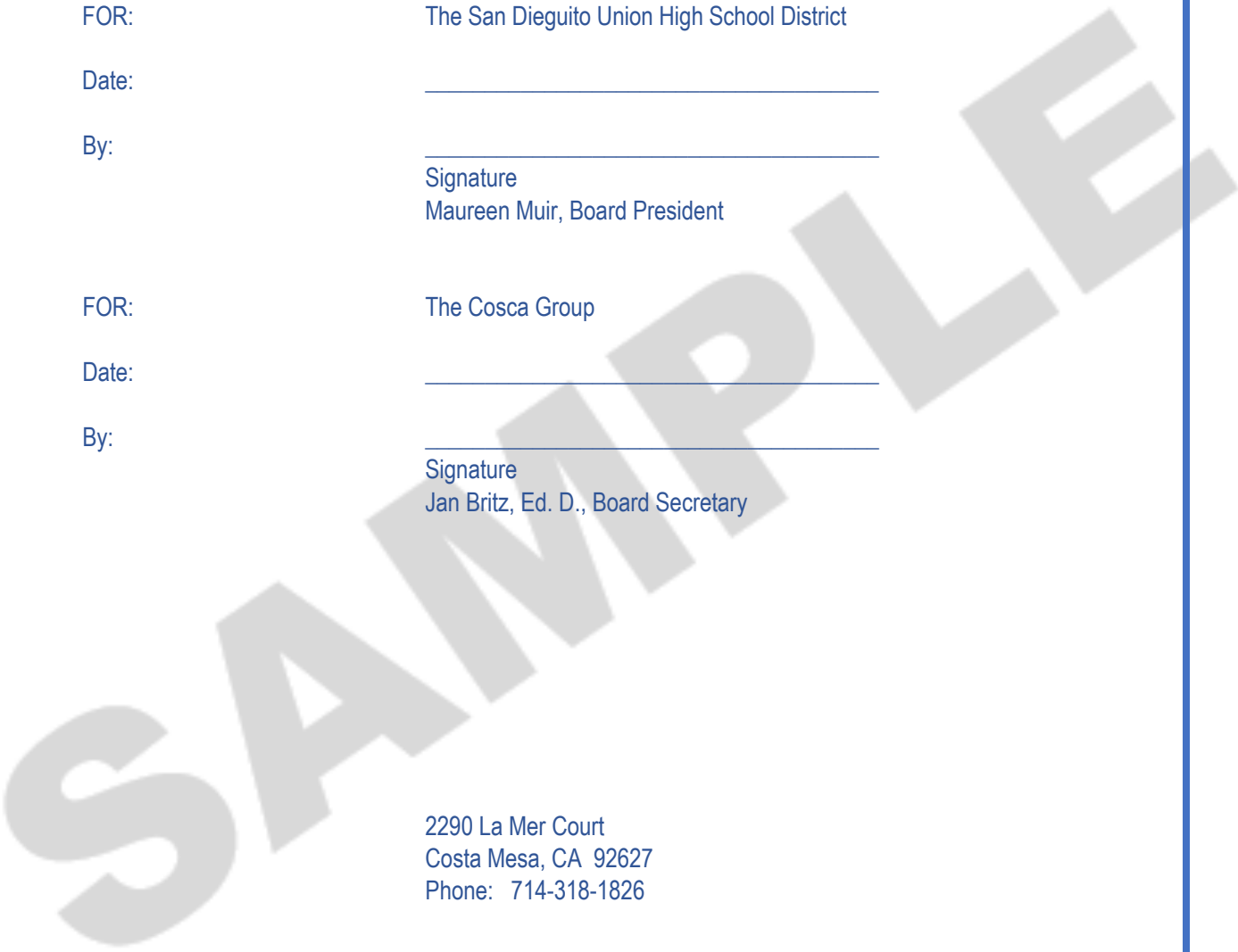
FOR: The Cosca Group

Date: _____

By: _____
Signature
Jan Britz, Ed. D., Board Secretary

2290 La Mer Court
Costa Mesa, CA 92627
Phone: 714-318-1826

Federal I.D. Number: 33-0972414



PARTIAL CLIENT LIST

Baldy View Regional Occupational Program	Bonita Unified School District
Brawley Union High School District	Chino Valley Unified School District
Cotati-Rohnert Park Unified School District	Culver City Unified School District
Delhi Unified School District	Desert Sands Unified School District
El Rancho Unified School District	Eastside School District
El Segundo City Police Department	Escondido Union School District
Fillmore Unified School District	Hayward Unified School District
Hermosa Beach Unified School District	Huntington Beach City School District
Keppel Union School District	King City Unified School District
Laguna Beach Unified Sch District	Livermore Valley Joint USD
Lytle Creek Development Partners	Madera Unified School District
Mammoth School District	Marysville Joint Unified School District
Milbrae School District	Monrovia Unified School District
Moreno Valley Unified School District	Morgan Hill Unified School District
Mountain View-Whisman Sch District	National City School District
Novato Unified School District	Oceanview School District
Orange Unified School District	Palos Verdes Peninsula USD
Palisades Charter High School	Paradise Unified School District
Redondo Beach Unified School District	Rialto Unified School District
Rosemead School District	Saint Helena Unified School District
San Bernardino Unified School District	San Gabriel Unified School District
San Lorenzo Unified School District	Santa Ana Unified School District
Santee School District	Silver Valley Unified School District
South Pasadena Unified School District	Sweetwater Union High School District
Sulphur Springs School District	Taft Union High School District
Tahoe Truckee Unified School District	Tamalpias Union High School District
University of Southern California	Viista Unified School District
Washington Unified School District	Waugh School District
Waugh School District	Windsor Unified School District
Wiseburn School District	Woodland Joint Unified School District
Yosemite Unified School District	

Jan Britz, Ed.D.

A Life-Long Career in Pursuit of Excellence

3240 Texas Avenue
Simi Valley, CA 93063

805.796.9772 Mobile
805.522.1097 Land Line
janbritz3240@gmail.com

EXPERIENCE

Partner, The Cosca Group
A Leadership Development Corporation

Superintendent of Schools
Burbank Unified School District

Assistant Superintendent of Schools
Burbank Unified School District

Assistant Superintendent
South Pasadena Unified School District

Director of Human Resources
South Pasadena Unified School District

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

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

EDUCATION

Ed.D. University of Southern California
M.S. California State University
M.A. California State University Northridge
B.A. Eastern Michigan University

PHILOSOPHY

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

SPECIAL EXPERTISE

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

RECOGNIZED FOR

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

CERTIFICATIONS

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

25.

ITEM 3

Steve Kennedy, Ed.D.

Ensuring Educational Excellence for Our Most Precious Resource, Our Children.

29624 Hoxie Ranch Rd.
Vista, CA 92084

760-216-2525
fskennedy@me.com

EXPERIENCE

Partner, The Cosca Group
A Leadership Development Corporation

Superintendent of Schools
Menifee Union School District

Assistant Superintendent of Schools
Menifee Union School District

Principal
Menifee Elementary School, Menifee Union School District
Bonsall Elementary School, Bonsall Unified School District
Hilltop Elementary School, Chula Vista Elementary School District
Montgomery Middle School, Cajon Valley Unified School District

Adjunct Professor
National University
California State University, San Marcos

Association of California School Administrators
Director of Superintendent Academy, San Diego County Region

EDUCATION

Ed.D. Argosy University
M.S. National University
B.A. San Diego State University

PHILOSOPHY

All children are individuals of great worth and deserve to be prepared for a future that suits their unique talents and abilities.

SPECIAL EXPERTISE

- Program Planning and Implementation for High Needs Populations
- Personnel Best Practices
- Board/Superintendent Relationships
- Leadership Mentoring & Management
- Performance Assessment & Evaluation
- Stakeholder Engagement
- Instructional Supervision
- Public Relations
- Communication

RECOGNIZED FOR

- Leadership
- Integrity
- Work Ethic
- Achieving Goals
- Professionalism

CERTIFICATIONS

- K-12 Administration
California
- K-12 Teaching, Multiple-

ADDENDUM:

Table of Contents

- I. Mammoth Position Brochure**
- II. Resumes of Previous Placements**

ITEM 3

A Leadership Development Corporation



AN INVITATION TO APPLY

SUPERINTENDENT

Mammoth Unified School District

Mammoth Lakes, CA 93546

The Board of Trustees of the Mammoth Unified School District seeks a long-term relationship with an exceptional and collegial educational leader who can maintain and

build on the District's strengths and potential.

ITEM 3

The District and Community

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



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

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

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

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

elementary school, they have a very successful Dual Immersion Program and a music program for all students. The Middle School offers foreign Language to all their students. **ITEM 8**



Mission Statement

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

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

THE DISTRICT'S GOALS

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

Academic Achievement

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

Fiscal Responsibility

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



Communication, Culture, and Safety

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

Technology

ITEM 3

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

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

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

Strengths of the District

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

Greatest Needs/Critical Issues Facing the District

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

Desired Characteristics of the New Superintendent

A leader who:

- Is a good communicator and good listener
- Will always put students first
- Demonstrates integrity and transparency

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

The Selection and Application Process

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

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

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

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

Send Completed Application and Related Information electronically to:

The Cosca Group

c/o Mr. Joel Shapiro and Dr. Jan Britz

jshapiro516@gmail.com

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

CONTRACT TERMS

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

For additional information, please contact:

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

BOARD OF EDUCATION

- Nancy Armenta - President
- Ronald Esquivel - Clerk
- Rhonda Harmon - Member
- Veronica Pena - Member
- John Quintanilla - Member

Fal Asrani EdD.

Designing innovative education environments where team-work and collaboration drives equity-centered practices to address systemic gaps in student and staff success.

CONTACT INFORMATION

5875 Doverwood Drive
Culver City, CA, 90230
(949) 331-5402
asranifal@gmail.com

EXPERIENCE

Assistant Superintendent, Ed Services, Victor Valley UHSD, Victorville CA (grades 7-12, Enrollment: 12,000 ADA-based Urban District) 11/19- current

- Coordination of services with two feeder elementary districts- Pre-CTE, accelerated courses. Common formative assessments, and student supports
- Successfully received the LCSSP grant for 2 million dollars to support the elementary and high school district community programs
- All student services programs- County schools, alternative education options
- Leading the design and development of the 10-year Education master Plan
- Designed and implemented five new CTE Academies and a Middle College High School, and the first WASC accredited Virtual school in the high desert
- Overall supervision of \$15 million categorical budgets and LCFF/ ESSR I & II
- Redesigned Special Education and reduced over \$1.5 million expenses
- Introduced district wide Equity, Diversity and Implicit Bias training
- Led the transition to full distance learning- with full online platforms, instructional materials and teacher/staff PD support
- Negotiations, LCAP, Budget Oversight Committee and Facilities Committee
- Grant writing resulted in 2 million for community programs
- 7 PBIS awards, 1 Golden Bell and 2 Distinguished School awards
- Supervision of state assessments, accountability measured
- Professional development and in all areas of teaching and learning

Chief Academic Officer, Adelanto ESD, Victorville/Adelanto CA (Grades Tk-8, Enrollment: 8300 ADA based rural district) 2017-2019

- All student services programs- county schools, alternative education options
- Reversed trend in declining state results two years in a row
- Introduced TK-3 Reading initiative to target 4th grade reading goal
- Implemented a teacher-led district wide standards alignment initiative
- Instituted common formative assessments to support site and district PLCs
- PBIS recognized schools; recalibrated MTSS practices to support RTI2
- Designed a cutting edge virtual Independent study School for Tk-8
- Conducted district wide two-year PD on Equity, Diversity and Implicit Bias
- Introduced Coding in all 15 schools; started the high desert Coding Academy
- Supervised and increased integration of technology
- Expanded middle school pathways/honors courses aligned to feeder district
- Negotiations, LCAP, Budget Oversight Committee and Facilities Committee

Deputy Superintendent, Teaching and Learning, Tahoe Truckee USD, CA (Grades Tk-12. Enrollment: 3800 Basic Aide Rural District) 2015- 2017

- All student services programs- county schools, alternative education options
- Continued upward growth in State tests across all grades
- Reduced achievement gaps for ELs and Special Education students and increased reclassification and redesignation rates through a robust data based PLC practice
- Instituted Standards based grading practices by working with Dr. Marzano and his team through a two-year process
- Introduced Dual Immersion programs at three elementary sites and expanded the Elementary Literacy initiative, and Summer School programs
- Successfully wrote the CTEIG grant and awarded over 3.5million dollars

SKILLS

Budget - LCFF and LCAP
Negotiations & Conflict Resolution
Community Partnerships
CTE and Technology Integration
Diversity and Equity projects
School Improvement
Strategic & Master Planning

COMMENDATIONS

Nominated for ACSA Diversity Award 2020
Excellence in Governance Nominee, Truckee Chamber of Commerce, 2016
PTO Award, Principal of the Year 2009
OCDE Human Relations Award, 2008
Who's Who High School Principal, 2008
Newport Mesa SuperStar Award, 2007

PROFESSIONAL ORGANIZATIONS:

Board Member of CASCD
Board Member of Kids First Foundation
ACSA State Legislative Council, Region 12 Representative
Member of California League of High Schools
State/ National Member, AASA

CERTIFICATES

Change Leadership
Harvard Business School
Urban Superintendent Academy
AASA/ Howard University
Superintendent Academy
ACSA
Personnel Academy
ACSA

- Established a WASC accredited adult school and GED center from ground up which served over 300 adults during its first year
- Collaboratively built technical academies with local businesses
- Negotiations, LCAP, Budget Oversight Committee and Facilities Committee

PRESENTATIONS **ITEM 3**

Presenter for ACSA, CALSA Edu Tech, and RTM:
Tackling Distance Learning- March 2021 RTM
Partnership for Work Ready Community ,
Edu-Tech Atlanta 2020
Designing an Education Ecosystem, 2020
Alternative School Think Big, 2016

Executive Director, Pasadena USD, CA

(Grades TK-12, Enrollment 19000 ADA based suburban district) 2012- 2015

- New position created to recruit me for secondary schools redesign
- Successfully removed the district from a 5-year OCR oversight and established a strong EL program
- State recipient of grants exceeding 15 million
- Partnership with Pasadena City College, established several cutting edge academies and CTE pathways for TK-14 transition
- LCAP and LCFF development and implementation
- Established the Adult Education Center for the first time in PUSD
- Negotiations, LCAP, Budget Oversight Committee and Facilities Committee

REFERENCE

Dr. Ron Williams
Superintendent, Victor Valley UHSD
(951) 314 9459
rwilliams@vvhhsd.org
Ms. Anita Tucker, President, VVTA , Victor Valley UHSD
atucker@vvhhsd.org
Ms. Debra Jones, Mayor, City of Victorville
(760)221-5590
onthego64@verizon.net
Mr. Jon Gundry,
Retired superintendent, SCOE
(323)559-4528
ammiehines@gmail.com
Ms. Nicole Anderson, Equity and Diversity Consultant,
(707) 333 8552
ndanderson@msn.com

Assistant Superintendent, Campbell UHSD, Campbell, CA

(ADA 7200 grades 9-12 suburban basic aid district) 2011-2012

- Supervision of all schools
- Designed the new CTE pathway program
- Special Education and EL department supervision

District Improvement Officer, Antioch USD, Antioch CA

(Grades TK-12, Enrollment 18,000 ADA-based urban district) 2009-2011

- Appointed to reform, streamline and turnaround elementary and secondary schools in a Program Improvement year 5 district.
- Developed and introduced one of the most progressive and applauded 'Trainer of Trainer' models for staff development and training, in partnership with ACSA.
- Launched a public effort to boost college readiness and graduation rates, resulting in a 19% increase in graduation rates and a 12% increase in four-year college readiness rates.
- Introduced Dual immersion, CTE pathways and elementary literacy initiatives with large scale teacher engagement

High School Principal, Newport Mesa USD, CA

(Grades 7-12, Enrollment 2300 Basic Aid suburban district), 2005-2009

- Recognized as a National Blue Ribbon School
- Recognized as California Distinguished School
- US World News ranked as 178, up from 333 previous years
- API increased from 682 to over 900 in four years

High School Principal, Norwalk-LaMirada USD, CA

(Grades 9-12, enrollment 2200 ADA-based suburban district) 2002- 2005

- Recognized as California Distinguished School
- Introduced and certified as International Baccalaureate school
- API increased from 618 to 770 in 3 years
- Recognized as AP award school

Assistant Principal, Student Services, Hacienda La Puente USD, CA

(Grades 9-12, Enrollment-1700) 1998- 2002

Teacher, Special Education & Coordinator, Strategic Plan, Victor Valley UHSD

(Grades 7-12, Enrollment 9500) 1992 -1998

EDUCATION

Doctorate in Education (EdD) 2010, University of Southern California, Los Angeles

Masters of Arts, Special Education 1997, Chapman University, Fullerton, CA

Bachelors of Business Administration 1992, Loma Linda University, Riverside, CA

DR. JACQUELINE A. CARDENAS jcarden2@mail.brandman.edu

6117 Carson Street (310) 962-4464 Cellular
Lakewood, CA 90713

CREDENTIALS – STATE OF CALIFORNIA

Administrative Services Clear Credential

Clear Multiple Subject Teaching Credential, includes BCLAD Authorization

EDUCATION

Doctorate of Education in Organizational Leadership, Brandman University, Irvine, 2019

Master of Science in Educational Administration, National University, Los Angeles, 1998

Bachelor of Arts in Psychology and Social Behavior, Minor in Spanish, University of California, Irvine, 1993

Language and Culture Program, Universidad Iberoamericana, Mexico City, Mexico, 1992

PROFESSIONAL EXPERIENCE***Assistant Superintendent, Educational Services, El Rancho Unified School District 2017-Present***

- Oversee all educational programs as Chief Academic Officer for 8,500 students in grades TK – 12 and 300 Adult School students; Track student data and metrics to measure and report academic progress
- Direct the adoption of the core English language arts and English language development programs in TK-8; Prioritize professional development and teacher release time to observe demonstration lessons to standardize and refine instructional practices in whole group instruction, small group guided reading, and designated English language development for a 4.6-point increase in English language arts on the California School Dashboard
- Expand the Dual Language Immersion (DLI) program through establishing a DLI Leadership Team to create a District DLI Master Plan, providing teacher professional development, and strengthening Spanish language acquisition for students; Expand the pathway to plan for expansion efforts to move DLI into the middle school level; Collaborate with California Association of Bilingual Education (CABE) Professional Development Specialist to ensure teachers were equipped with relevant pedagogy and strategies
- Create a culture of district improvement by establishing a partnership with districts across the state through work with California Education Partners; Center efforts to build internal capacity through Improvement Science and close the achievement gap for underrepresented students
- Lead efforts to support English learner (EL) success through a focus on Long Term English Learners; Directed EL Shadowing and instructional routines to support speaking and listening, and the use of academic language in all content areas throughout the day, prioritizing integrated English language development
- Build systems for greater interdepartmental communication and collaboration around initiatives, programs, personnel, professional development, budgets, and student success as a means to unify and communicate with internal stakeholders; Create digital repositories, a process, and timelines for departments to share critical information in a timely manner to support a solution-oriented system
- Oversee Local Control Accountability Plan (LCAP) and stakeholder engagement; Align goals, actions, and services to support the implementation of the District’s Strategic Plan, the LCAP, Program Improvement Review for Special Education, Differentiated Assistance, and Additional Targeted Support and Intervention with School Plans for Student Achievement
- Manage budgets for the most impactful return on investment for \$17.5 million Supplemental and Concentration funding, \$2.9 million federal funding, and \$100,000 general department funding

ITEM 3

- Plan and provide principals' and teachers' differentiated staff professional development in district's initiatives, content standards, and instructional strategies for meeting the needs of diverse learners
- Shared responsibilities include: Contributor in Executive Cabinet; Extended School Year and Summer School; Public Relations/Partnerships; Certificated, Classified, and Administrative Negotiations; Superintendent's Designee

Director of Curriculum and Instruction, Los Nietos School District Office 2013-2017

- Supervise curriculum, instruction, and state and local assessments
- Direct the adoption process to restructure the core English language arts, English language development, and mathematics program for full implementation
- Oversee Local Control Accountability Plan (LCAP) and stakeholder engagement; Monitor State and Federal programs, compliance, and corresponding budgets
- Plan and provide principals' and teachers' differentiated staff professional development in district's initiatives, content standards, and instructional strategies for meeting the needs of diverse learners; Supervise, coach, and mentor principals
- Coordinate instructional technology integration, online interventions and assessments, technology-related purchases, and plan related professional development
- Collaborate with community-based organizations; Serve as district administrator for the Community Day School Consortium and Coordinating Council for the Special Education Local Plan Area
- Shared responsibilities include: Certificated Negotiations; Supervise Certificated, Classified, and Management Personnel; Extended School Year and Summer School; Public Relations; Superintendent's Designee; Contributor in Executive Cabinet and Administrative Cabinet

ADDITIONAL EXPERIENCE**Principal**, Los Nietos Middle School, Los Nietos School District 2010-2013**Assistant Principal**, Bellflower High School, Bellflower Unified School District 2007-2010**Assistant Principal**, Bellflower Middle School, Bellflower Unified School District 2006-2007**Principal**, Dickison Elementary School, Compton Unified School District 2005 - 2006**Principal**, Laurel Street Elementary School, Compton Unified School District 2002-2005**Vice Principal**, Garfield Elementary School, Long Beach Unified School District 1998-2002**Adjunct Professor**, California State University, Long Beach 1997-1998**Graduate**, Los Angeles County Sheriff Department Citizen's Academy Spring, 1997**Teacher**, Burcham Elementary School, Long Beach Unified School District 1994-1998**Eligibility Worker II**, Department of Public Social Services (Los Angeles County) 1994**High School Spanish Teacher**, Padre Pio Academy, Garden Grove 1992-1993**Social Adjustment Counselor**, St. Anselm's Community Center 1992-1993**PROFESSIONAL AFFILIATIONS AND LEADERSHIP****CHOICES Interagency Member**, Rio Hondo College/SPIRIT Services/District 2019-Present**President's Advisory Committee Member**, Rio Hondo College 2017-Present**Board Member, Advancing Teachers of Mathematics Advisory**, CSUF 2017-Present**Mentor**, California Association of Latino Superintendents & School Administrators 2014-Present**Member**, California Association of Latino Superintendents & School Administrators 2008-Present**Member**, Association of California School Administrators 1998-Present**Guest Speaker**, Rio Hondo College's Leadership Academy 2018 & 2019**Presenter**, California Latino School Boards Association and California Association for Bilingual Education on Ethnic Studies Leadership/Culturally Relevant Pedagogy 2017-2018

ITEM 3

Early Adopters LCAP Professional Network Member, California Collaborative for Spring, 2017
Educational Excellence and Los Angeles County Office of Education

Executive Board Member, Whittier Area School Administrator, ACSA Charter 2013-2017

Attendee & Presenter, More Advocates for Safe Homes, Los Angeles County 2010-2016

Coordinating Council Representative, Whittier Special Education Local Plan Area 2013-2015

Healthy Los Nietos Representative, Collaborative: School District & Presbyterian 2011-2015
Hospital

Consortium Member, Whittier Area Science Technology Engineering & Mathematics 2012-2014

Jennifer A. Wildman

1590 Cerra Vista Drive * Hollister, CA 95023 * (831) 234-9787

Objective

Superintendent position in a district seeking a transformational leader with experience in effective management & supervision, data-driven decision-making, collaboration and inspirational educational leadership.

Profile

Educational Leader with a commitment to excellence. Passion for innovation, collaboration, problem-solving, community-building and learning. Promotes an environment where teachers & students can thrive. Creates effective partnerships between students, teachers, parents, and school leaders. Steadfast belief in all students' ability to succeed when provided with highly effective instruction and support.

Professional Experience

K-8 ASSISTANT SUPERINTENDENT OF EDUCATIONAL SERVICES

- Leadership and supervision of a staff of 40+ in multiple departments (K-8)
 - Curriculum, Instruction and Assessment
 - Technology & Innovation
 - English Learner, Categorical and Migrant Programs
 - Student Services & Special Education
- Designed, organized and lead professional development opportunities for all teachers and staff
- Developed and implemented programs, processes and procedures to build strong district systems
- Provided and supported an extraordinary learning environment for teachers, staff, students and parents
- Developed and monitored the district LCAP process, from gathering stakeholder feedback to board approval
- Led district efforts to complete the application for and develop our own new teacher induction program
- Collaborated with district and community partners to support special programs, grants, before & after school programs
- Supported district principals and assistant principals during a 7 month interim superintendency
- Provided regular communication and built positive relationships with board members, superintendents and staff
- Developed Instructional Leadership Teams at every site; met quarterly to monitor progress & provide site support
- Led instructional coaching implementation, including supervision and support for 13 instructional coaches
- Performed regular program evaluation and development of long-term strategic plans (Curriculum, EL, Technology, PD)

K-12 DIRECTOR OF CURRICULUM, INSTRUCTION AND ASSESSMENT

- Leadership in all areas of curriculum, instruction and assessment
- Organized, planned and presented professional development for teachers & administrators
- Directed educational technology for intervention, assessment, online learning, student information & data systems
- Coordinated assessments for local, benchmark formative, and state accountability measures (including SBAC)
- Developed CCSS, NGSS and ELA/ELD implementation plan, including parent education and communication
- Provided administrators and teachers with data and support for analysis and data-driven decision-making
- Developed and supported elementary & secondary RtI models, including integration of special education staff and students
- Worked with board members to oversee Task Forces, including Green Schools & Technology
- Provided regular recommendations, updates and presentations to the school board regarding programs and progress
- Wrote grant proposals and procured funding for CTE, Computer Science, Online Learning and Watershed Education
- Managed Title 2, Title 1, Title 3, EEFG and other district and department budgets

ELEMENTARY SCHOOL PRINCIPAL

- K-5 Elementary School Principal at Landmark Elementary School in Pajaro Valley Unified School District
- School made ongoing academic gains and gained a reputation as a caring and effective community of learners
- Created and maintained a safe, positive and joyful teaching and learning environment for student and teacher success
- Managed large-scale school budgets, including general, categorical, donations and grant funds

Jennifer A. Wildman

1590 Cerra Vista Drive * Hollister, CA 95023 * (831) 234-9787

- Facilitated several school improvement projects including the installation of a computer lab
- Managed, coordinated and evaluated a team of up to 60 certificated and classified staff members
- Wrote, received and managed grant programs for the Arts, Technology, Life Lab, Professional Development and more
- CASA Educator of the Year - 2009, and PVUSD Administrator of the Month - 2011

CURRICULUM, INSTRUCTION AND COACHING

- Literacy/Reading First Coach & Systematic ELD Curriculum Developer – Developed Instructional and Training Materials
- Trained teachers across the state in implementation of Systematic ELD, RESULTS, & Houghton Mifflin Reading
- Certified Data Team Trainer-Center for Leadership and Learning (Contributing Author: *Data Team Success Stories*)
- School selected by the Leadership & Learning Center as a White Paper & to present at Data Teams Summit in Colorado

K-12 TEACHER – GENERAL AND SPECIAL EDUCATION

- 20+ years experience teaching Pre-School, Elementary and Secondary
- Variety of school settings: private school, public schools, and a state special education residential program
- General & Special Education, Deaf and Hard-of-Hearing, Resource Specialist, Reading Specialist

Education

BRANDMAN UNIVERSITY

Doctoral student - Organizational Leadership, anticipated completion Winter 2019

SAN JOSE STATE UNIVERSITY – Administrative Leadership Program 2005-2006

CALIFORNIA STATE UNIVERSITY NORTHRIDGE – Liberal Studies/Multiple Subjects/Special Education

Master of Arts- Special Education, 1988 WITH HONORS

Bachelor of Arts – Liberal Studies, 1986 CUM LAUDE

Credentials & Certificates Held

- Administrative Services Credential - Clear
- Multiple Subjects K-12, Clear with Cross Culture Language and Academic Development Certification
- Special Education, Communicatively Handicapped
- Resource Specialist Certificate and Reading Specialist Certificate
- Child Development Site Supervisor Permit
- ACSA Superintendents' Academy - completed Spring 2017

Professional Employment History

HOLLISTER SCHOOL DISTRICT – 2017-present

- Assistant Superintendent of Educational Services

SANTA CRUZ CITY SCHOOLS – 2012-2017

- Director of Curriculum, Intervention and Assessment

LANDMARK ELEMENTARY- PVUSD 2003 TO 2012

- Principal 2006-2012
- Assistant Principal 2005-2006
- Literacy Coach 2003-2005

BRADLEY/SALSIPUEDES ELEMENTARY/WHS – PVUSD 1993 TO 2003 – Special & General Education Teacher (K-12)

KIDS KORNER SANTA CRUZ 1991-1993 - Head Teacher for Private Preschool Program

STATE SCHOOL FOR THE DEAF, FREMONT – MIDDLE SCHOOL 1989-1991

SAN MARINO ELEMENTARY – CENTRALIA SCHOOL DISTRICT 1987-1989

MORNINGSIDE ELEMENTARY – LAUSD 1985-1987

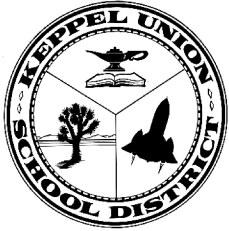
Jennifer A. Wildman

1590 Cerra Vista Drive * Hollister, CA 95023 * (831) 234-9787

Professional References*

- MARILYN SHEPHERD – Retired superintendent, consultant, Monterey (831) 402-9492
- JOSEPH JACONNETTE – Retired superintendent, cohort mentor, Brandman University (831) 601-4760
- MARYANNE MAYS – Retired superintendent, Pajaro Valley Unified School District (408) 560-8229
- RICK LUST – Assistant Director, Special Education, Fremont Unified School District (831) 902-9360
- CAROLINE CALERO – Director of Learning & Achievement, Hollister School District (831) 840-2804
- ANN PENNINGTON – Director of Nutrition Services & Warehouse, Hollister School District (831) 630-6300 x 388
- ELENA HATCHETT – Principal, Hollister School District (831) 801-5852
- DARCI CRISTOBAL – Teacher, RO Hardin Elementary School, Hollister School District (831) 324-4133
- PAUL BLOOMBERG – CEO Core Collaborative (619) 778-6663
- CHRIS LOMPA – SELPA Director, San Benito County (831) 809-4786
- ROBERT ELLINGSEN – Common Core Instructional Coach and Interim Administrator SCCS/Hollister (831) 429-3410
- KRIS MUNRO – Superintendent, SCCS (831) 429-3410
- EILEEN BROWN – Student Services Director, formerly SCCS, now North Monterey County (831) 251-2468
- CLYDE CURLEY – Principal, Westlake Elementary School, Santa Cruz City Schools (831) 588-1698
- NANCY LENTZ – Administrative Assistant to the Superintendent, SCCS (831) 429-3410
- LYNDA PATE – Coordinator, Pajaro Valley Unified School District (831) 246-0460
- FRANCINE HOLLAND – English Language Arts Coordinator, Pajaro Valley Unified School District (831) 535-8485
- LAURA BESSER – Professional Development Associate, Corwin (303) 870-7758

**additional references available on request*



Seek Education

Strive for Excellence

Aspire to Greatness

BOARD OF TRUSTEES _____

DOMINIQUE BALLANTE
 JANEY DUTTON
 MATTHEW GAINES
 CHEROKEE HALLIDAY
 THERESA MCCAFFERTY

SUPERINTENDENT

DR. JACQUELINE A. CARDENAS

M
A
X
—
N
E
G
R
I
P
I
N

August 18, 2020

TO WHOM IT MAY CONCERN

On behalf of the Keppel Board of Trustees, I want to thank you for the incredible help you gave us in advertising, screening, and selecting a new Superintendent for the Keppel Union School District. Once again, you came to help us and we are so thankful.

Since the event that prompted us to start our search, you followed an impeccable timeline. You covered all the needs of the district, interviewing our stakeholders thoroughly and competently. You elicited details regarding the qualities we wanted in our new superintendent, you refined and elaborated on our expectations, and advertised the position in record time. Finally, from the pool of applicants, you selected the top candidates, explaining why the non-elected were not at the standards you wanted to offer us for our new leadership.

We were impressed by those who applied for the position, and even more by the pre-selection you had made based on their initial resumes and your inquiries. The crème de la crème was then interviewed and you expertly guided us regarding their qualities, strengths, and their salary expectations.

It wasn't difficult to get a consensus from our 5 Board members. We finally chose Dr. Jacqueline Cardenas for her positive attitude, her enthusiasm, her bilingual expertise, and the skills and knowledge she brought to the position. She has been working with us for the last month and a half, starting a difficult school year with many decisions to make in a time of distance-learning and isolation from the classroom.

Dr. Cardenas believes in building relationships. She is approachable and eager to make the departments work together to improve teaching. She is making a difference improving the relationships between the personnel and smoothing difficulties before they become serious problems. We are so happy to have her as our leader at this challenging time.

We cannot express enough how thankful we are to Mr. Shapiro and Ms. Puleo for all the guidance and the excellence they gave us. Our Board, District and community trust totally their work and their integrity. We commend The Cosca Group for the high degree of professionalism and organizational skills demonstrated throughout this process.

We recommend the Cosca Group to any District looking for a well-organized and professional firm to conduct the recruitment and hiring of a Superintendent.

Dominique Ballante, President,
Keppel Board of Trustees

ITEM 3

3907 Rosemead Blvd.
Rosemead, CA 91770
Phone: 626-312-2900
Fax: 626-312-2906



BOARD OF TRUSTEES
Nancy Armenta
Diane Benitez
Ronald Esquivel
Veronica Peña
John Quintanilla

ALEJANDRO RUVALCABA, Superintendent

April 4, 2019

To Whom It May Concern,

It is with great pleasure that I write a letter of recommendation for the COSCA Group. At the inception of searching for a new Superintendent for the Rosemead School District, the Board of Trustees knew how imperative it was to hire a professional and well-established consulting firm to assist the Board during this crucial process. As we moved forward in selecting a firm, several firms were vetted; however, due to the strong knowledge base, professionalism, and years of experience that Mr. Joel Shapiro and Dr. Jan Britz showcased during their presentation, it was clear that the COSCA Group was the best suited firm to support us in selecting a new leader that would move the Rosemead School District to new levels of excellence.

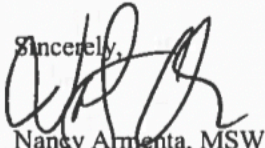
The COSCA Group was appointed as our search firm in the middle of an election year in which three Board Members were up for re-election, and faced with this reality, Mr. Shapiro and Dr. Britz immediately began working tirelessly in establishing strict timeframes, meeting with all stakeholders, speaking with Board Members individually, and collecting data and information. Moreover, I was thoroughly impressed by their ability to establish a trusting, nurturing, and collaborative relationship with the Board early on and keeping us well informed during all the stages of the hiring process.

The Board of Trustees received more than 30 applications for the Superintendent position. We had a very qualified pool of candidates, most of whom had extensive experience in the educational field. We interviewed eight highly qualified candidates, one of them being Alejandro (Alex) Ruvalcaba, who by a unanimous vote, was selected as the new Superintendent of the Rosemead School District. The Board feels fortunate to have found a new leader with a vision, integrity, skills, and the ability to lead the District into the future in a positive and successful direction.

I can't express enough, my sincere gratitude and thankfulness to Mr. Shapiro and Dr. Britz for their excellent work, support, and guidance throughout the hiring process. They are both consummate professionals who were highly vested in ensuring that our District had the most qualified candidates to select from that possessed the credentials and characteristics we were looking for in a new leader. It is through their dedication, care, ability to connect with all stakeholders and the Board, and thoughtful listening of all concerns that lead to an extremely successful outcome.

In conclusion, I highly recommend the COSCA Group to any District seeking a search firm that is highly professional, well-organized, is thoughtful in their approach, have expertise in recruiting highly qualified candidates, and are genuinely vested in providing optimal services to their clients. It was a great pleasure to work with Mr. Shapiro and Dr. Britz.

Sincerely,



Nancy Armenta, MSW
2018 Board President

Fax Numbers:

Human Resources: 626-307-6148 • Education Services, Special Education & Student Support Services: 626-312-2913
Child Development & Nutrition Services: 626-307-6178 • Business Services & Superintendent's Office: 626-312-2906

ITEM 3

PAUL LINDER, PRESIDENT
TAFT UNION HIGH SCHOOL BOARD OF TRUSTEES

701 Wildcat Way
Taft, California, 93268
plinder@bak.rr.com
661-319-5804

June 01, 2021

To Whom It May Concern:

I am pleased to be writing this Letter of Recommendation for The Cosca Group. We have been so pleased with the work they have done to secure our district, with a new Superintendent. From the moment we interviewed them, we knew we wanted the Cosca Group to be our search firm. We interview several reputable companies and The Cosca Group stood out among them all.

The Cosca Group provided an extensive interview process, which began with the Board of Trustees, included input from the senior staff, both bargaining units, non-represented staff and the community. Interviews with all parties were conducted either in person or via ZOOM, since we were in the midst of a pandemic. Not once did this slow the process down and I was so impressed on how they developed and held to a very rigorous schedule. We wanted to be ahead of the curve because we knew candidates would be difficult to attract.

We received constant update on the progress of our search, which I appreciated greatly. Once the application process closed, we were afforded all the information from all qualified candidates for review. Interviews were scheduled promptly and we were presented with several qualified candidates to interview. During the entire process, we felt we were in control, which we appreciated.

Joel Shapiro and Jan Britz worked tirelessly behind the scenes to facilitate and anticipate every obstacle. They assured us that we were the only client they were working on at the time and this made us feel valued, special and confident in their work product.

When all was said and done, we believe we have secured the most qualified person to lead our district. This is due to the great work of The Cosca Group.

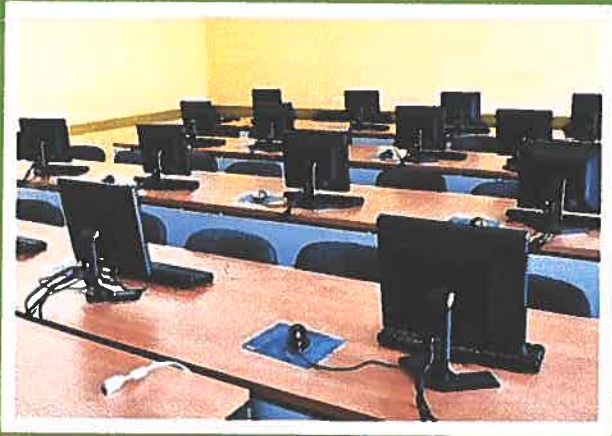
We look forward to the beginning of this new chapter for our Students and Community. The Cosca Group will be right there with us since their service also includes, after the hiring, continued governance training and new superintendent support. I cannot say enough about their Professionalism, Confidentiality, Thoroughness and follow through.

If you should have any questions about our experience with The Cosca Group, please contact me at 661-319-5804 or by email at plinder@bak.rr.com at anytime.

Respectfully,



ess Education Support
Services Group
A subdivision of Atkinson, Andelson, Loya, Ruud & Romo



SUPERINTENDENT SEARCH PROPOSAL

Education Support Services Group
a subdivision of aalrr

September 3, 2021

Ms. Maureen 'Mo' Muir, Board President
San Dieguito Union High School District
710 Encinitas Blvd.
Encinitas, CA 92024

Cerritos Office
12800 Center Court Drive
Suite 300
Cerritos, California 90703

(562) 653-3200 Phone
(562) 653-3333 Fax
www.essinformation.com

Dear President Muir and Members of the SDUHSD Board of Trustees:

Thank you for your consideration of the Education Support Services (ESS) Group to assist the San Dieguito Union High School District Governing Board in its search for your next superintendent. It would be an honor to work with the Board, staff, and community in this important endeavor.

The ESS Consulting Group has been a subdivision of the legal firm Atkinson, Andelson, Loya, Ruud & Romo (AALRR) since 2006. Our team offers a variety of specialized services that address an array of human resource, leadership and governance needs of California school districts. Based on client interest and demand, our services have grown to include the facilitation of superintendent searches.

In the following pages, you will find the key elements that underscore each phase of an ESS search. What makes our services unique is that any aspect of the activities described herein can be modified to align with Board priorities, including a "recruitment light" option with less emphasis on candidate recruitment and more on candidate vetting.

If ESS is invited to conduct the San Dieguito search, joining me will be top adviser Dr. Suzette Lovely. Collectively, Dr. Lovely and I have served in every position from instructional aide, to classroom teacher, to principal, to deputy superintendent, to superintendent in small, medium and large California school districts.

Under the ESS umbrella, our consultants have recently completed a number of high profile superintendent searches including: San Marcos USD; Manhattan Beach USD; Placentia Yorba Linda USD; Claremont USD; Santa Ana USD; Huntington Beach Union High School District; Huntington Beach City School District; Menifee Union School District; and Central School District. Additionally, Dr. Lovely has also facilitated successful searches/placements in neighboring Solana Beach as well as Oceanside and Anaheim Elementary School Districts.

Our biographies, letters of recommendation, and client contact information are included in this proposal, offering an in-depth perspective of ESS's track record of success.

If you have any questions about the Education Support Services (ESS) Group or our proposal, please feel free to contact me directly at 714-907-3634 or arasmussen@aalrr.com.

Sincerely,

Alan Rasmussen

Alan Rasmussen, Ed.D, Managing Consultant

Education Support Services Group
a subdivision of aalrr

Table of Contents

Search Overview.....	3
Qualifications, Experience, References.....	4
Proposed Search Plan and Timelines.....	5
Gathering and Using Community Input.....	8
<i>Sample Community Engagement Survey</i>	9
Primary Contact/Team Member Bios.....	12
Proposed Budget.....	14
Appendix A	
<i>Resumes of recently placed Superintendents</i>	15
Appendix B	
<i>Client Letters of Recommendation</i>	16



Search Overview

THE ESS DIFFERENCE

- Board has major involvement in directing the search
- ESS advisers facilitate key tasks and processes, per Board direction
- Advisers work with the Board to determine a feasible search timeline that aligns with current circumstances (e.g. upcoming election, interim superintendent status, board meeting schedules, district holidays, community expectations, etc.), in order to ensure the most qualified and exceptional candidates emerge
- Existing district resources/staff utilized, as appropriate, to expedite the process and reduce costs
- Perspective and working knowledge of the specific needs/dynamics of your district and how those needs/dynamics influence candidate recruitment
- Ability to embed search contract into district's existing legal contract with AALRR, previously approved by SDUHSD Board of Trustees
- Fees based on scope of work and level of involvement Board desires. If the Board prefers a "light" recruitment, ESS can modify aspects of the engagement or activation phases of the search at a reduced cost. **(Total Fee: NTE \$25,700)**

KEY ELEMENTS OF SEARCH PROCESS

- Board-centric and confidential
- Applicant qualifications, experiences, and core attributes established by the governing board
- Meetings with key stakeholder groups (as determined by the Board) to gather input about the desired characteristics the community would like to see in the incoming superintendent
- Development of a *Leadership Profile* outlining the desired characteristics of SDUHSD's new superintendent based on Board input, stakeholder group data, on-line survey results, and other information made available to ESS advisers
- Weekly communication surrounding progress of the search to all trustees
- Vacancy posted on EDJOIN, EDCAL print and on-line publications, and other platforms determined by the Board
- Trustees have access to applications and supporting materials

Education Support Services Group
a subdivision of aalrr

Section 2: Adviser Qualifications, Experience, References

*Below is a list of superintendents placed by ESS along with their tenure in each respective district. Resumes of four recently placed superintendents (indicated by an * below) can be found in Appendix A.*

District	ADA	Superintendent	Hire Date
Hermosa Beach City School District	1,198 (K-8)	Patricia Escalante	July 1, 2012 (retired June 2020)
Huntington Beach Union High School District	15,534 (9-12)	Clint Harwick	January 1, 2017
Acton-Agua Dulce USD	12,532 (K-12)	Larry King	September 18, 2017 (resigned March 2021)
Gustine USD	1,765 (K-12)	Bryan Ballenger	March 1, 2018
Santa Ana USD	46,593 (K-12)	Jerry Almendarez	November 21, 2019
Menifee Union School District	12,142 (K-8)	Jennifer Root	September 22, 2020
Placentia-Yorba Linda USD	24,296 (K-12)	Jim Elsasser*	November 10, 2020
Huntington Beach City School District	5,588 (K-8)	Leisa Winston	December 15, 2020
San Marcos USD	19,894 (K-12)	Andy Johnsen*	April 20, 2021
Central School District	4,219(K-8)	Amy Nguyen-Hernandez*	April 29, 2021
Claremont USD	6,744 (K-12)	Jeff Wilson	May 6, 2021
Pleasant Valley School District	6,802 (K-8)	Danielle Cortes	May 20, 2021
Manhattan Beach USD	6,030 (K-12)	John Bowes*	July 7, 2021

Contact information of clients who have worked with Dr. Rasmussen and Dr. Lovely. Current Letters of Recommendation are included in Appendix B:

Reference	Email	Phone
Duane Dishno, Trustee, Huntington Beach Union HSD	ddishno@hbuhd.edu	714-292-0632
Karin Freeman, Board President, Placentia-Yorba Linda Unified SD	kfreeman@pylusd.org	714-777-0686
Kathy Thompson, Board President, Central School District	rckathy9216@gmail.com	909-241-5754
Jackie Johansen, Board President, Menifee Union School District	jjohansen@menifeeusd.org	951-746-0668
Stacy Carlson, Board President, San Marcos Unified SD	stacy.carlson@smusd.org	714-833-6701
Nancy Treser Osgood, Board President, Claremont USD	ntosgood@cusd.claremont.edu	909-731-5848
Dr. Rigo Rodriguez, Board President, Santa Ana Unified SD	rigo.rodriguez@sausd.us	714-504-7446
Jackie Filbeck, Board Clerk, Anaheim Elementary	jfilbeck@anaheimelementary.org	714-833-6701
Vicki King, Board President, Solana Beach School District	vking@sbsd.net	858-344-5726



Education Support Services Group
a subdivision of aalrr

Section 3: Proposed Search Plan and Approximate Timelines

An ESS search involves four distinct phases characterized by the acronym **EAST-Engagement, Activation, Selection, Transition**. The respective timelines described herein can be modified within reason to meet board priorities, scheduling opportunities, district needs, and unforeseen circumstances.

Engagement Phase: September 13-October 15, 2021

Activity/Task	Description of Process
Initial Planning Board Workshop Closed Session Week of September 13	Board discusses search process, timelines, candidate qualifications, prospective internal/external candidates, and salary parameters. Board develops list of stakeholder groups for advisers to meet with to determine district strengths, needs, and desired characteristics of the incoming superintendent.
Stakeholder Input September 20-October 4, 2021	Virtual/in-person meetings to gather input around district strengths, needs, and desired characteristics of SDUHSD's incoming superintendent. On-line survey launched to engage employees and greater community in search process (See sample pp. 9-11 of proposal).
Leadership Profile Open Session October 14, 2021	<i>Leadership Profile</i> presented to Board, which includes universal themes and desires discovered during engagement phase. Trustees receive advance copy Friday, October 8th.

Activation Phase*: October 4 – November 30, 2021

* overlaps with Engagement Phase

Activity/Task	Description of Process
Candidate Recruitment	Superintendent vacancy posted on EDJOIN, EDCAL, and other board-determined publications. Position Closes Monday November 15, 2021 at 5:00 p.m.
Candidate Screening and Vetting	<i>Leadership Profile</i> acts as blueprint for candidate screening and recruitment; additional screening criteria determined via Board input and relevant experience identified in community engagement survey. Advisers tap into vast regional/state/national networks to actively recruit, correspond with, and screen candidates that possess desired experiences and leadership attributes.

<p>Board Review of Application Materials</p> <p>November 30-December 3, 2021</p>	<p>Applications and supporting materials are available for trustee review beginning November 30, 2021.</p> <p>One of the unique features of ESS is the ability of our advisers to gain important information regarding candidates' backgrounds beyond what may appear on a resume or letter of recommendation. This reflects the integrity of the ESS team and the relationships built during their years in the field. The Board's commitment to maintain this same level of confidentiality and integrity is critical to a successful search outcome.</p>
<p>Development of Preliminary Interview Questions</p>	<p>ESS advisers draft preliminary interview questions aligned with the <i>Leadership Profile</i>. Board members will have the opportunity to suggest revisions or create their own questions for consideration by the full Board.</p>
<p>Selection Phase: December 6, 2021-January 20, 2022</p>	
<p>Activity/Task</p>	<p>Description of Process</p>
<p>Determination of Candidate Slate</p> <p>(Closed Session: 2-3 hrs.)</p> <p>Week of December 6 or 13, 2021</p>	<p>Board meets with ESS advisers to identify the best qualified candidates and determine who will be invited for interviews. Candidates not selected for an interview are notified.</p> <p>Board finalizes round one interview questions and reviews protocols to ensure fair/effective interviews are conducted with the identified candidate slate.</p>
<p>First Level Interviews (Full Day Closed Session)</p> <p>Proposed Date Week of January 3, 2022</p>	<p>First round interviews conducted, with each interview roughly 50 minutes in length with breaks and lunch in between.</p> <p>At the conclusion of the daylong interviews, ESS advisers facilitate a discussion to help the Board narrow the field and determine which individual(s) to invite back for a second interview.</p>
<p>Second Level Interviews (Half Day Closed Session)</p> <p>Proposed Date Week of January 3, 2022</p>	<p>Board conducts second-round interviews with the top contender(s). Normally this involves a less structured interview with no more than two candidates to probe more deeply into the responses heard the previous day.</p> <p>Board makes selection of its preferred candidate.</p> <p>ESS notifies finalist along with unsuccessful candidates following Board deliberation.</p>

Education Support Services Group
a subdivision of aalrr



Section 4: Gathering/Using Community Input

Stakeholder Focus Group Meetings

ESS advisers will work with Executive Assistant Joann Schultz to schedule Stakeholder Focus Group Meetings. Meetings will be held virtually, telephonically, or in person based on COVID protocols and group preferences. The length of these meetings can range from thirty minutes to one hour, depending upon the number of participants.

Once Stakeholder Groups are identified by the Board, an email (see sample below) is sent informing participants of trustees' interest in hearing their voices to help determine the core attributes and experiences desired in SDUHSD's next superintendent.

The Board of Trustees has retained Dr. Suzette Lovely and Dr. Alan Rasmussen from Education Support Services (ESS) to facilitate the search for our next superintendent. Your voice is vitally important to the SDUHSD Board as candidates are recruited and vetted for this process.

*With this in mind, the search advisers would like to meet with you on **(date/time)** to seek your input surrounding three key questions:*

1. *What are the best things about San Dieguito? What draws people to the District?*
2. *What are the greatest challenges/needs SDUHSD is facing in the years ahead?*
3. *What qualities or characteristics are important in order for your new superintendent to be successful in the position?*

Please respond to this email to confirm your participation. If however, you are unable to attend this meeting but wish to speak with the Board's advisers, please include your phone number in your response so they may contact you.

On-Line Community Engagement Survey

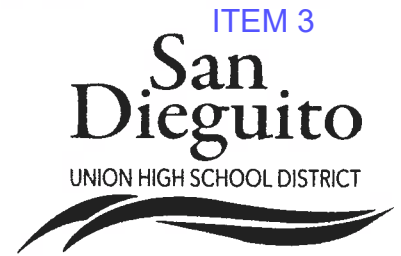
In addition to Stakeholder Focus Group meetings, ESS enlists input from all employees, parents, students, and the broader San Dieguito community through an on-line survey. A sample survey is provided on pp. 9-11, with the caveat that the Board has the ability to modify or eliminate survey questions as deemed appropriate.

How is Community and Staff Input Used?

Data from Stakeholder Focus Group meetings and the Community Engagement Survey is synthesized into a *Leadership Profile* report. This report is organized around universal themes and serves as a blueprint for candidate recruitment, screening and vetting. Input from the SDUHSD staff and community is used to:

- Better understand district needs and challenges from a variety of perspectives/ points of view.
- Align/integrate Board priorities with staff and community desires.
- Gain valuable insight that will help inform the Board's selection of SDUHSD's next superintendent.
- Provide a roadmap of essential actions for the newly hired superintendent.
- Hold up a mirror to district culture and climate as a tool to organize for the future.

Education Support Services Group
a subdivision of aalrr



Superintendent Search Community Engagement Survey

Introduction: The San Dieguito Union High School District Board of Trustees is seeking staff and community input in its search for a new superintendent. This survey is designed to gather your perceptions about the current state of the district along with the experiences and characteristics you believe are important for the incoming superintendent to possess.

The survey is being conducted by outside search advisers who are assisting the Board in this important endeavor. All individual responses will remain anonymous.

Section I: Participant’s Role

Please indicate your current role in the district (drop down menu).

1. Administrator
2. Certificated staff
3. Classified staff
4. Parent
5. Student
6. Community member
7. Other

Section II: State of the District

Please rate the overall quality of teaching and learning in SDUHSD **before the disruptions brought on by the pandemic .**

Excellent	Above Average	Average	Below Average	Poor

For the next group of questions, select the response that best describes your agreement with each statement. In determining your response, consider how the District existed **before COVID-related school closures and/or changes:**

ITEM 3

Education Support Services Group
a subdivision of aalrr

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. The district provides a clear, compelling vision for the future.					
2. The district maintains high expectations for student performance.					
3. The district is working to close achievement gaps.					
4. Schools in our district are safe.					
5. The district engages the community as a partner to improve the system.					
6. Communication from the district is transparent and ongoing.					
7. The district embraces diverse racial, cultural and socio- economic groups.					
8. Facilities are clean and well-maintained.					
9. The district provides adequate technology to support student learning.					
10. The district is heading in the right direction.					

Section III: Expertise and Experience

Below are specific areas of expertise that different superintendent candidates may possess. From your perspective, how much weight should the Board place on each area? Rate each area using the scale of importance.

	Critically Important	Mildly Important	Unimportant
Teaching & Learning			
Experience as a Site Principal			
Understanding School/Community Culture			
Negotiations/ Labor Relations			
Fiscal Management			
Facilities Management			
Public Relations			
Board Governance			

Education Support Services Group
a subdivision of aalrr

Section IV: Leadership Skills

This next section asks you to consider the leadership skills of an effective superintendent. While all the skills are important, please select the five skills you feel are **MOST IMPORTANT**.

- Is present/visible throughout the district and community
- Is sensitive to and understands the needs of diverse learners
- Is a forward thinker and open to new ideas
- Is knowledgeable about best practices surrounding teaching and learning
- Is able to build capacity and teamwork
- Is able to work effectively with the Board of Education
- Develops a clear and compelling vision for the future
- Ensures the District remains fiscally solvent
- Maintains a culture of high expectations for students and employees
- Fosters a climate of trust and mutual respect
- Recognizes/celebrates staff contributions

Section V: Personal Attributes

From your perspective which personal attributes should be given the most attention by the Board when assessing applicants? While each quality may be important, please select the four that are **MOST IMPORTANT** to you.

- Approachable and personable
- Strong communicator
- Good listener
- Humble
- Honest and ethical
- Inclusive (seeks broad input in making decisions)
- Problem solver
- Resourceful
- Risk taker
- Sense of humor
- Tenacious (doesn't give up)

Section VI: Additional Considerations

What is the single-most important issue the new superintendent will have to address upon taking the job in SDUHSD? _____

In choosing the next superintendent, which path or strategy do you feel the Board of Trustees should take (Select only **ONE** answer):

- Find a candidate who will stay the course and continue the good work of the previous administration.
- Find a candidate with the same general leadership style and educational philosophy as the previous administration, but who is able to make some necessary changes.
- Find a different kind of candidate—someone who is ready to take the district in a significantly different direction.

Education Support Services Group
a subdivision of aalrr

Section 5: Primary Contact/Team Member Bios

If ESS is selected to conduct the San Dieguito Union High School District search, Dr. Suzette Lovely will serve as the Lead Adviser and primary contact for the Board.

Suzette Lovely, Ed.D.

ESS Consultant

Education Support Services Group

slovely@aalrr.com

949-283-7862



Dr. Lovely is a consultant with Education Support Services Group (ESS). ESS provides a comprehensive menu of services for governing boards, superintendents, senior management teams, school districts, and community colleges. ESS offers direct support in: leadership development, governance, executive search services, labor relations, human resource management, fiscal services, and facility planning.

Dr. Lovely's career spanned 35 years in K-12 education. As a young college student, her love of teaching materialized while serving as an instructional aide. She subsequently spent 27 years as a teacher, assistant principal, principal, director, deputy superintendent, and acting superintendent in Capistrano Unified School District. In 2009, she was appointed Assistant Superintendent of Human Resources in Placentia-Yorba Linda. Dr. Lovely finished her public school journey as Superintendent in Carlsbad Unified before retiring in 2016.

Following her undergraduate work at UC, Irvine Suzette earned a Master's Degree in Educational Administration from National University and a Doctorate from Cal State University, Fullerton. She has mentored and trained hundreds of aspiring school leaders with affiliations at: CSU, Fullerton; Chapman University, Brandman University; the School Superintendent's Association (AASA), the Association of California School Administrators (ACSA), and Orange County Department of Education (OCDE).

During her tenure in Carlsbad Unified, Dr. Lovely spearheaded several efforts to engage stakeholders in the work of public education including: implementation of a \$13 million county-wide Career Pathways Grant; facilitation of the North County Legislative Action Network (LAN) to engage state/local legislators in public policy discussions; collective impact work with local industry giants Qualcomm, Viasat, TaylorMade Thermo Fisher, and Lego; and leveraging state funding to boost student learning. Dr. Lovely was among a select group of San Diego superintendents invited to meet with the Governor to discuss LCAP implementation, ESEA reauthorization, and state education priorities.

Since retiring from Carlsbad, Dr. Lovely has remained active in strategic planning work, leadership coaching, and superintendent searches. She is the author of four books and co-founder of the Women in Education Leadership (WEL) Network. Dr. Lovely has been recognized for her influential leadership by Senator Patricia Bates, the California PTA, the Hi-Noon Rotary, the Carlsbad Chamber of Commerce, the Master Teacher Publication, Chapman University, and the San Diego Art Education Association.

Education Support Services Group
a subdivision of aalrr

Alan Rasmussen, Ed.D.
ESS Consultant
Education Support Services Group
arasmussen@aalrr.com
714-907-3634



Dr. Rasmussen is a consultant with Education Support Services Group (ESS). ESS provides a comprehensive menu of services for governing boards, superintendents, senior management teams, school districts and community colleges. The divisions of service include: leadership and governance; executive search services; curriculum and instruction; human resource management; and business and fiscal services.

Dr. Rasmussen has more than 40 years of experience in K-12 education, including 13 years as a superintendent. In addition to his superintendent experience, he has been an Assistant Superintendent for Personnel and Educational Services, elementary and middle school principal, and a classroom teacher.

Following undergraduate study at California State University, Northridge, Dr. Rasmussen received his master's in teacher education from the University of Southern California and a doctoral degree from the University of La Verne. Dr. Rasmussen served as an adjunct faculty member for the University of La Verne's doctoral program in organizational leadership.

In 2001, Dr. Rasmussen received the Gold Award from the California Teachers Association for his support of public education. In 2004, the Association of California School Administrators named him as the Superintendent of the Year for Region IX.

As one of the founding ESS consultants, Dr. Rasmussen has been working with and assisting school boards and superintendents in supporting and building leadership capacities for over a decade. Areas of focus include board governance training, superintendent evaluations, goal setting, conflict resolution, leadership coaching, policy revisions, human resource audits, and executive searches. In addition, Dr. Rasmussen is a trained presenter and facilitator of interest-based bargaining and has extensive experience working with districts during negotiations.

Dr. Rasmussen has been involved with numerous professional organizations, including the American Association of School Administrators, the Association of California School Administrators, and the Northern and Southern California Superintendents Associations.



Education Support Services Group
a subdivision of aalrr

Section 6: Proposed Budget (Fees & Expenses)

The total fee for a “full service” search is \$25,700. This includes costs for advisers’ planning time, research, travel, and services related to each phase of the search. Each service/activity described below is designed to ensure the SDUHSD Board attracts, screens, hires, and supports the most qualified candidates. However, in the event trustees wish to engage in a “light recruitment” option ESS could: pare down Focus Group sessions; confine candidate outreach to select individuals; bring fewer candidates forward for interviews; and/or eliminate the post-search transition meeting.

Service/Activity	Hourly Rate @ \$150/hr.	Projected Cost
Engagement Phase		
Initial Planning Board Workshop	4 hours	\$600
Focus Group Meetings & one-on-one input sessions (Zoom, in-person, telephonic)	40 hours	\$6,000
On-line survey launch/webpage development	1 hour	\$150
Activation Phase		
Candidate outreach & communication	25 hours	\$3,750
On-line Survey data analysis Draft <i>Leadership Profile</i> Report	3 hours	\$450
Board Presentation: <i>Leadership Profile</i>	2 hours	\$300
Selection Phase		
Candidate correspondence; applicant screening; reference checks; blind appraisals; document prep for Board review	35 hours	\$5,250
Closed Session: Determination of candidate slate; finalize Round 1 interview questions	6 hours	\$900
Closed Session: Round 1 & 2 Interviews plus follow-up (candidate correspondence, announcement plan; press release; etc.)	40 hours	\$6,000
Transition Phase		
Transition Meeting	4 hours	\$800
Other/Misc.		
EDCAL Job Posting	District pd.	
Weekly Board Updates & outreach w/Bd. Pres. & Executive Assistant	8 hours	\$1,200
Support employment contract negotiations with Board President & legal counsel	2 hours	\$300
Due Diligence Background Check	Inc. in Fee	
		\$25,700

Appendix A

Resumes of Recently Placed Superintendents

ANDY JOHNSEN, ED.D.

Superintendent with 21 years of TK-12 administrative experience in urban and suburban school districts of varying sizes. Leadership accomplishments include the restoration of healthy relationships, trust and re-focusing of efforts on teaching and learning in a district emerging from a period of turmoil and the abrupt resignation of the previous superintendent; establishing a positive, student-centered districtwide vision for the future; managing the competing interests of staff and parents and successfully reopening schools after the COVID closures; turnaround of two underperforming schools as principal.

Areas of Expertise include:

- | | | |
|---------------------------------|--|---|
| ✓ Climate/Relationship building | ✓ Vision and goal development | ✓ Communication for varied audiences |
| ✓ Team building & coaching | ✓ Board support and development | ✓ Instructional improvement for equitable outcomes for all students |
| ✓ Spanish language fluency | ✓ Connections and partnerships with families of varied backgrounds | ✓ Systems development |

EXPERIENCE & NOTABLE CONTRIBUTIONS

Lakeside Union School District • Lakeside, CA • 2017 - Present

SUPERINTENDENT

Primary areas of focus: Improved district climate, support of board governance team, improved academic performance, fiscal health

- Worked collaboratively with stakeholders to re-establish district climate of trust, respect and healthy relationships following the abrupt resignation of the former superintendent
- Facilitated creation and adoption of a new district Vision Statement and accompanying Graduate Profile
- Worked collaboratively with Board of Trustees to establish goals for 1) improved academic achievement, 2) social-emotional wellbeing of students, and 3) environments that support student learning; aligned Board goals to LCAP and school SPSA plans to create "through line" from the board room to the classroom
- Supported NGSS, Spanish & Mandarin Language Immersion, Project Lead the Way, Performing Arts, and other innovative programs aligned to Graduate Profile
- Worked collaboratively with Board of Trustees to craft Governing Board Standards of Practice, Protocols, and support systems to ensure productive working relationships on governance team
- Implemented regular cadence of timely and transparent communication with district families and community
- Improved relationships with certificated and classified bargaining units through Labor-Management Initiative
- Built cohesive and collaborative Executive Cabinet team focused on supporting schools and meeting Board goals
- Shifted district improvement strategy to increase site ownership and accountability for goals, resulting in measurable improvements on all campuses (unique to each site)
- Supported the development of districtwide MTSS systems to improve outcomes for underserved students
- Accomplished collaborative development and Board adoption of Facilities Master Plan with \$28M of initial projects completed or underway
- Guided Board of Trustees and stakeholder groups through budget reduction process to identify and implement 3.5% of general fund reductions for 2019-20 and 2020-21 school years
- Maintained consistent ending fund balance of approximately 15% (2017-present)
- Guided district and community through school closures due to COVID-19
- Successfully reopened schools for in-person instruction in September, 2020

15a

ITEM 3

Lakeside Union School District • Lakeside, CA • 2015 - 2017**ASSISTANT SUPERINTENDENT, EDUCATIONAL SERVICES**

Primary areas of focus: Development of principals as instructional leaders; development of district-wide instructional systems

- Served as Interim Superintendent (Sept. 2017-Feb. 2018)
- Formed District Instructional Leadership Team to build capacity of administrators and teacher leaders in the development of instructional goals and improvement of district wide instructional systems
- Restructured LCAP process to increase focus on closing of achievement gaps and improve stakeholder involvement
- Coached principals to support growth in instructional leadership and improvements in student achievement
- Facilitated design and implementation of district-wide professional development in CCSS math in support of new district-wide adoptions
- Supported district-wide SBAC test score gains ranging from 2%-14% in ELA and Math in five out of six testing grade levels
- Collaborated with Superintendent and Board of Trustees to revise Board goals
- Participated with district negotiations team to successfully negotiate collective bargaining agreements with Lakeside Teachers Association

Poway Unified School District • Poway, CA • 2007 - 2015**PRINCIPAL, VALLEY ELEMENTARY SCHOOL**

As a schoolwide Title 1 program, Valley Elementary had the highest free/reduced lunch rates (51%) and the highest percentage of EL students (47%) in PUSD. The school served 740 students, 65% of whom received Spanish language instruction in a two-way dual language immersion program.

- API gains of 38 points since 2007 (2013 API: 841 - Highest API achieved by school)
- Title 1 Academic Achievement Award (2008, 2009)
- Highest API growth in PUSD "pure cohort" analysis (2006-2009)
- Elementary Principal of the Year – ACSA Region 18 (2015)
- SDCOE Biliteracy Award (2009)
- Co-created PUSD principal coaching program and provided leadership coaching to new and veteran PUSD principals

Los Angeles Unified School District • Los Angeles, CA • 2005 - 2007**DIRECTOR, CHARTER SCHOOLS DIVISION**

Directed district office division responsible for overseeing 103 independent charter schools serving ~40,000 K-12 students. Supervised ~ 30 district office administrators, advisors, fiscal and clerical staff. Worked closely with school board members and senior district staff. Conducted regular charter school principal/director meetings and school site visits.

- Wrote LAUSD Charter School Policy governing approval and operation of over 100 charter schools across Los Angeles Unified – the 2nd largest charter school authorizer in the U.S.
- Worked collaboratively with multiple parent organizations, charter advocacy groups, state and local officials to establish systems for effective charter governance and operation
- Created LAUSD policies and procedures for charter approval, school oversight and charter renewal
- Managed approval and opening of 22 new independent charter schools; closed 2 schools

Los Angeles Unified School District • Los Angeles, CA • 2002 - 2005**PRINCIPAL**

Principal at Santa Monica Blvd. Community Charter School, a fiscally independent, multi-track year-round inner-city charter school. Enrollment: 1400; Schoolwide Title 1; 86% EL students

- API improvement of 153 points in three years
- Converted school from traditional district school to fully fiscally independent charter school
- Created Professional Development School partnership with Pepperdine University

Los Angeles Unified School District • Los Angeles, CA • 1999 - 2002

ASSISTANT PRINCIPAL

Los Angeles Unified School District • Los Angeles, CA • 1994 - 1999

TEACHER

EDUCATION

Doctor of Education, Educational Leadership

UNIVERSITY OF CALIFORNIA, LOS ANGELES | Los Angeles, CA | 2003

Master of Science, Educational Administration

PEPPERDINE UNIVERSITY | Los Angeles, CA | 1997

Bachelor of Arts, Speech Communication & Spanish

CALIFORNIA STATE UNIVERSITY, LONG BEACH | Long Beach, CA | 1993

OTHER TRAINING

- Superintendents Academy (ACSA)
- Urban Superintendents Academy (USC/AASA)
- Coaching Leaders to Attain Success (ACSA)
- Core Fundamentals Program – Coach U (International Coach Federation)

MEMBERSHIPS

- AASA: The School Superintendents Association
- Association of California School Administrators (ACSA)
- Association for Supervision and Curriculum Development (ASCD)
- International Coach Federation

PRESENTATIONS AND PUBLICATIONS

Executive Presence. Oxnard Union High School District. 2017. | ACSA Leadership Summit. 2016.

Developing Your Cabinet Team Members for Breakthrough Performance. *Leadership Matters*, Illinois Association of School Administrators. December 2016.

A Shift in Perspective on the Principalship. *Vanguard*, School Administrators Association of New York State. Fall, 2014.

A TK-5 Model of District Wide Support for Teaching and Learning Math. San Diego County Office of Education Superintendent’s Achievement Gap Task Force. 2014.

Ten Strategies to Reduce Stress in the Principalship. No Excuses University National Convention. 2014.

How To Work Less, Produce More, and Still Get the Job Done in a Sensible School Week. Superintendents & Principals meetings at various school districts. 2014-17.

Increase Your API by Developing Successful Grade Level Teams. 11th Annual California Charter Schools Conference. 2004.

Parent Education Programs in Schools That Serve Immigrant Populations. Coalition of Essential Schools Fall Forum. 1997.

John Bowes, Ed.D.

PROFESSIONAL EXPERIENCE

Superintendent**2016-Present**

Davis Joint Unified School District

I am proud to lead the Davis Joint Unified School District - a diverse and engaged community that is a leading center of educational innovation. Fostering a love of learning and equipping each student with the knowledge, skills, character, and well-being to thrive and contribute to an evolving and increasingly connected world is exemplified in our Graduate Profile. My fluency in Spanish has allowed for greater engagement with the community, coupled with the development of responsive instructional practices and aligning our LCAP services to eliminate achievement, opportunity and access gaps. Outstanding music and theater programs, Seal of Biliteracy and world language offerings, an award-winning special education inclusion model, and a world-class robotics program all benefit our students. The creation of our own teacher credentialing program, the launch of Multi-Tiered System of Supports, an overhaul of our Career Technical Education program are significant accomplishments. The successful passage of the 2016 parcel tax for programs, passage of the 2018 facilities bond measure, passage of the 2020 parcel tax for employee compensation, a transition to By-Trustee election areas, the recasting of our websites and social media channels, and the use of school environment and student climate data to advance our equity work and social-emotional learning reflects my commitment to meet the needs of all students and to excellence in education. Leading DJUSD through the pandemic, the development of a high-quality Distance Learning program, and a successful transition to a five-day-a-week program for in-person and distance learning students are hallmarks of my leadership in DJUSD.

Assistant Superintendent, Human Resources**2014-2016**

Palos Verdes Peninsula Unified School District

As the Assistant Superintendent of Human Resources for the Palos Verdes Peninsula Unified School District, serving over 1400 employees and 11,500 students in a PK-12 setting, a primary focus was leading the District in recruiting and retaining talented and qualified educators and support staff committed to providing a world-class educational experience for our students. Leading our District negotiations, a focus on aligning our collective bargaining agreements with our District vision, goals and Roadmap, and playing a lead role in the integration of technology to enhance recruitment and operational systems were areas of significant accomplishment.

Director of Labor Relations**2012-2014**

Los Angeles Unified School District

As the Director of Labor Relations for the Los Angeles Unified School District, serving over 600,000 students and 1,000 schools, representing the District at the bargaining table with two certificated and ten classified bargaining units was crucial to keeping the District solvent during the recession. Developing labor, budget and communication strategies with the Superintendent and Board of Education was critical to building relationships with our unions that developed job restoration and furlough agreements, which saved thousands of jobs during the economic downturn. Leading these efforts in the second largest school district in the country required the coordination of multiple departments, superior relationship skills, navigating through great complexity, and clear communication with multiple constituencies.

ITEM 3

Assistant Chief Human Resources Officer
Los Angeles Unified School District**2009-2012**

As the Assistant Chief Human Resources Officer, my team of 15 certificated and classified experts advised over 2,200 school site, local district and central office administrators and supervisors on all aspects of collective bargaining, grievances, employee evaluation and discipline. In addition to leading labor negotiations during the recession, developing an administrative training program, co-chairing the Teacher Effectiveness Task Force, chairing the Task Force's committee on teacher evaluation, and utilizing digital tools and programs to improve our collective bargaining outcomes, evaluative, discipline, and grievance processes were a focus of my first Executive Cabinet role.

Field Director, Office of Staff Relations
Los Angeles Unified School District**2007-2009**

As a Field Director, a clear focus on advancing our instructional and operational goals for students anchored my work providing service to over 220 administrators and other District personnel in all collective bargaining matters. Supporting over 70 elementary, middle and high schools to develop win-win solutions in matters of contract interpretation and labor issues was a hallmark of this work. The review of charter school applications and serving on the District's health and welfare bargaining team were new learning experiences in this role. Serving on the California State University, Northridge Doctoral Program Advisory Board to establish their Ed.D. program was a unique district/university partnering opportunity.

Director, School Services
Los Angeles Unified School District**2004-2007**

As a Director of School Services, the primary focus was on improving the achievement and learning environments of 20 traditional and year-round calendar schools, which included over 12,000 students, 45 administrators and 700 teachers across a wide variety of San Fernando Valley neighborhoods. Regularly providing professional development that increased the instructional leadership capacity of principals and assistant principals focused on our district's theory of action for enhancing educational outcomes for all students focused these efforts. Establishing positive relationships with charter schools and deep involvement in the school construction process at new and existing sites was an expanding area of responsibility at that time. Spanish language fluency supported my work with parents and students across the district.

Principal, Coldwater Canyon Elementary School
Los Angeles Unified School District**2002-2004**

As the Principal at Coldwater Canyon Elementary, leading the development of model programs for standards-based instruction with a focus on the use of formative and summative data to transform how grade-level teams could change classroom practice was an area of significant accomplishment. Innovative special education mainstreaming and push-in programs while hosting a Reading First Federal Evaluation team as a demonstration site advanced our work in standards-aligned literacy development. The use of data-driven professional development and the use of assessments to ensure real-time instruction responsive to student learning needs was showcased in my best-practices presentation to State Superintendent Richard Riordan and LAUSD Superintendent Roy Romer.

ITEM 3

Principal, Lanai Road Elementary School
Los Angeles Unified School District**1999-2002**

As the Principal at Lanai Road Elementary, a clear and aligned focus on academic and social-emotional supports for students led to a 180-point increase of our API score over three years. In addition to implementing Arts Prototype, School for Advanced Studies and model special education programs, the engagement of parents and the community helped secure a Wonder of Reading Library, Anne and Kirk Douglas Playground, and Healthy Start Planning grants. Fluency in Spanish was critical to developing a shared vision and sustainable systems of practice of for the school with staff, parents and the larger community which established Lanai Road as a top-tier public elementary school.

Assistant Principal, Bassett Elementary School
Los Angeles Unified School District**1997-1999**

The launch of the standards-based instructional movement focused my staff development work with our staff. The use of data in improving classroom and school climate, student conduct and attendance helped focus my beliefs about the importance of equity and inclusion in our daily work as educators. Leading Student Success Teams and our Gifted and Talented program in this large, year-round, Title 1 school with a late-exit Spanish bilingual program were important learning experiences. Providing staff technology training and translating for Spanish-speaking parents at IEPs, Site Council meetings, English Learner Advisory, PTA meetings and other events was a regular and important part of my work.

Coordinator, Kittridge Elementary School **1995-1997**
Los Angeles Unified School District

Providing leadership for Title I, English Learners and School Improvement programs focused on the use of data to inform instructional and operational decisions. Leading parent trainings in Spanish and English, and regularly translating for Spanish-speaking parents at IEPs, report card conference meetings, English Learner Advisory, and school-wide assemblies were regular duties. Teaching courses in Health and Brain Based Learning for new teachers in the LAUSD District Intern program and my work on a Healthy Start Operational grant left a lasting impression on how health and wellness programs can have positive and direct impacts on student learning and well-being.

Teacher, Kittridge and Plasencia Elementary Schools
Los Angeles Unified School District**1990-1995**

Serving as a teacher in grades K-2 in a full-bilingual setting and my leadership work at these schools focused on science and the use of technology. These large, year-round, schools served many recent immigrant students and their families, and my fluency in Spanish was an important part of being able to make connections and create classroom environments where students felt safe and able to achieve their full potential. Completion of my teaching credentials through the LAUSD District Intern program took place during my first three years as a teacher. Being the first District Intern to become a Director in the LAUSD was a proud moment later in my career.

ITEM 3

United States Peace Corps Volunteer
Guatemala

1988-1990

Beginning my service as a United States Peace Corps in Guatemala, one month after graduating from Virginia Tech, in the newly formed Small Enterprise Development program was a coming-of-age experience. Working in the western highlands of Quetzaltenango and in the desert of El Progreso allowed me to support local entrepreneurs in augmenting their family income in businesses as diverse as producing cashew nuts, chicken raising, ceramic fuel-efficient stoves, glass blowing, assisting agricultural cooperatives and clothes making. My service there sparked a belief in the power of education as a means to success in life and to dedicating myself to become an educator.

SPECIALIZED TRAINING

Masters in Governance California School Boards Association	2018
Leading Edge Administrator Certification Technology Information Center for Administrative Leadership	2016
California Association of School Business Officials Certification University of Southern California – Rossier School of Education	2013-2014
Superintendents Academy Association of California School Administrators	2011

EDUCATION

Doctor of Education (Ed.D.) - Educational Leadership University of California, Los Angeles <i>Dissertation – Instructional Program Coherence in the Implementation of an Elementary English Language Arts Curriculum in a Large, Urban District</i>	2004-2007
Professional Administrative Credential University of California, Santa Barbara	1997-1998
Master of Arts, Educational Administration, Preliminary Administrative Credential California Lutheran University	1994-1995
California Multiple Clear Subject Credential California Bilingual Cross-Cultural Specialist Credential - Spanish District Intern Program Los Angeles Unified School District	1990-1993
Bachelor of Science Degree - Finance Bachelor of Science Degree - Management Minors in English and Sociology Virginia Polytechnic Institute and State University (Virginia Tech)	1983-1988

ITEM 3

RECENT PRESENTATIONS

- CCSS 2020 Implementation Consortium - Distance Learning in DJUSD
- CSBA 2019 Annual Education Conference - Social Emotional Learning and Student Voice: Moving Beyond the Buzzwords
- CSBA 2019 Delegate Assembly - Expert Panel on Special Education
- CSBA 2018 Annual Education Conference - Leveraging Student Voice and Engaging Every Learner
- ACSA 2018 Superintendents Symposium - Actionable Measures of Student and Family Engagement
- CASBO Sacramento Section 2017 Conference – The Future of Education
- Yolo County Office of Education Annual Elected Officials and Leaders Breakfast Forum 2016, 2017, 2018, 2019, 2020 – State of the District presentation

CURRENT AFFILIATIONS AND DISTINCTIONS

- UC Davis School of Education Dean’s Advisory Board
- California Collaborative for Educational Excellence (CCEE) Advisory Council
- University of California, Davis - UC Davis Superintendents Network
- Cited as one of the Top 300 Leaders in the Sacramento region – Sacramento Magazine, December 2019
- California School Boards Association (CSBA) Superintendent Advisory Council
- State Superintendent of Public Instruction Transition Team Workgroup on Public Pensions
- Northern California Superintendents Association
- Scaling Student Success Advisory Council
- Association of California School Administrators (ACSA)
- California Association of School Business Officials (CASBO)

COMMUNITY INVOLVMENT

- Rotary International, Davis Sunrise Rotary Chapter
- City of Davis and Davis Joint Unified School District 2 x 2 Committee
- Yolo County Supervisors and Davis Joint Unified School District 2 x 2 Committee
- University of California Davis and Davis Joint Unified School District Subcommittee
- Citizens Parcel Tax Oversight Committee, Davis Joint Unified School District
- Citizens Bond Oversight Committee, Davis Joint Unified School District
- Parent, Certificated, Classified, District English Learner, Special Education and School Climate Advisory Committees - Davis Joint Unified School District
- Davis Schools Foundation
- Davis Chamber of Commerce
- Davis Parent University

REFERENCES

Please see application packet

Amy Nguyen-Hernandez, Ed. D.

“Success is... knowing your purpose in life, growing to reach your maximum potential, and sowing seeds that benefit others. – John C. Maxwell

EMPLOYMENT HISTORY

Beaumont Unified School District (2020 – present)

- Assistant Superintendent of Instructional Support Services

Adelanto Elementary School District (2014 – 2020)

- 2017 – 2020 Superintendent
- 2014 – 2017 Chief Academic Officer

Chino Valley Unified School District (2006 – 2014)

- 2013 – 2014 Director of Curriculum and Instruction
- 2010 – 2013 Principal, Lyle S. Briggs (K-8) School
- 2008 – 2010 Principal, Rolling Ridge Elementary School
- 2006 – 2008 Assistant Principal, Rolling Ridge Elementary School

Rowland Unified School District (1998 – 2006)

- 2005 – 2006 Program Specialist/Literacy Coach
- 2004 – 2005 Teacher in Charge in Principal’s absence, Jellick Elementary
- 2002 – 2006 Beginning Teacher Support and Assessment (BTSA) Provider
- 2001 – 2003 Adjunct Site Faculty, CalState TEACH, Cal State Pomona
- 2001 – 2003 Pre-Intern Coach
- 1998 – 2006 Teacher

EDUCATION

2010	University of Southern California	Ed. D. Educational Leadership
2006	National University	M.S. Educational Administration
1997	State University of New York, Geneseo	B.S. Elementary Education

CREDENTIALS

- California Administrative Credential
- California Clear Multiple Subject Teaching
- California Cross-Cultural Language Acquisition

PROFESSIONAL MEMBERSHIPS

- Association of California School Administrators (ACSA)
- American Association of School Administrators (AASA)
- San Bernardino County District Advocates for Better Schools (SANDABS), Executive Member (2019 – 2020)
- California School Board Association (CSBA), Superintendent Advisory Council (2017-2019)

ITEM 3

RELATED PROFESSIONAL ACTIVITIES

Budget and Finance

- Oversight of \$105,000,000 annual budget
- Monitored \$83,700,000 Base, Concentration, and Supplemental Funds
- Refinanced \$8,135,000 in Certificate of Participation (COP) and \$16,000,000 in Community Facilities District (CFD) bonds

Community Relations

- Regularly attends school and community events
- Conducts parent group meetings such as LCAP Update and Input Meetings, District Advisory Council (DAC), African American Parent Council (AAPAC), Latino/Hispanic American Parent Council (LHPAC), and District English Language Advisory Council (DELAC)
- Organized and led community outreach meetings for District-wide school boundaries and school grade level configuration changes in 2015-16
- Created the District's Family Engagement Center

Educational Leadership

- Monitors legislation regarding academic programs, procedures, and processes and communicates implications to the Board through presentations and workshops
- Analyzes student performance data (District and State data) and communicates to the Board and Site Administrators
- Creates and leads Staff professional development trainings for Certificated and Classified Management team members
- Increased articulation and collaboration to our High School District
- Increased class options at the Middle Schools to include Honors, CTE introductory classes, and Spanish classes for A-G requirement credit
- Oversaw and evaluated all existing Charter Schools and new Charter School petitions when in the role of Chief Academic Officer
- Assisted in establishing and implementing the Linked Learning Pathways at 4 high schools when in the role of Director of Curriculum and Instruction

Personnel Relations

- Supervised and evaluated Cabinet members
- Supervises and evaluates Instructional Services Directors and School Site Principals
- Gave guidance on improving protocols and practices for hiring of staff
- Served on the District negotiations team in the role of Chief Academic Officer and Principal
- Served as the Skelly Officer in Classified and Certificated pre-disciplinary hearing cases

Relationship with the Board

- Delivers weekly Friday updates
- Consistent, timely email and text communication of incidents which may result in litigation or press coverage
- Facilitated yearly workshops for the Trustees to update the Governance Handbook
- Facilitated a workshop to create a Governance Calendar as modeled by CSBA
- Work collaboratively with each Trustee and the Board as a whole

James M. Elsasser, Jr., Ed.D.

EXPERIENCE

- 2012 – Present **SUPERINTENDENT** – Claremont Unified School District (District ADA – 7,000)
- 2009 – 2012 **ASSISTANT SUPERINTENDENT, HUMAN RESOURCES** – Anaheim City School District (District ADA – 19,300)
- 2005 – 2008 **DIRECTOR, CLASSIFIED PERSONNEL AND SPECIAL PROJECTS** – Los Alamitos Unified School District (District ADA – 9,500)
- 2000 – 2005 **PRINCIPAL**, Oak Middle School – Los Alamitos Unified School District (School ADA – 1,150)
- 1996 – 2000 **ASSISTANT PRINCIPAL**, East Middle School – Downey Unified School District (School ADA – 1,200; District ADA – 22,500)
- 1994 – 1996 **TEACHER**, West Middle School – Downey Unified School District
Taught beginning, advanced, and marching bands; vocal music; and introduction to music.
- 1992 – 1994 **ASSISTANT ADMINISTRATOR, HUMAN RESOURCES** – Downey Orthopedic Medical Group
Responsible for all aspects of human resources for a large orthopedic practice in Southern CA.
- 1990 – 1992 **TEACHER**, East Middle School – Downey Unified School District
Taught beginning, advanced, and jazz bands; vocal music; and introduction to music.

EDUCATION

- 2011 **UNIVERSITY OF SOUTHERN CALIFORNIA**, Los Angeles, CA
Doctorate degree in Educational Leadership with an emphasis in administration. Dissertation title: Allocation of Educational Resources to Improve Student Achievement
- 1994 **AZUSA PACIFIC UNIVERSITY**, Azusa, CA
Master of Arts degree in Education
- 1990 **AZUSA PACIFIC UNIVERSITY**, Azusa, CA
Bachelor of Arts degree in Music Education

PROFESSIONAL GROWTH

- 2015 – 2019 Education Research and Development Institute biannual conferences
- 2015 – 2018 Suburban School Superintendents annual conferences
- 2014 – 2018 National Center for Education Research and Technology biannual conference
- 2013 – 2020 Association of California School Administrators Superintendents' Symposium annual conferences
- 2011 – 2012 Association of California School Administrators Superintendents' Academy
- 2010 – 2012 Association of California School Administrators Negotiators' Symposium
- 2009 – 2019 California School Boards Association annual conferences
- 2005 – 2006 Association of California School Administrators Personnel Academy

ITEM 3

JAMES M. ELSASSER, JR., ED.D.
Page 2

PROFESSIONAL ACCOMPLISHMENTS

SUPERINTENDENT OF THE YEAR – Named Superintendent of the Year by ACSA Region 15 in 2017.

STRATEGIC PLANNING PROCESS – Implemented Claremont Unified School District's (CUSD) newly adopted strategic goals, mission, vision, and core values.

BOARD WORKSHOPS – Implemented an annual midyear CUSD Board of Trustees workshop on various topics to build our leadership capacity as a cohesive team of six, including Governance Team and Superintendent Protocols, Board self-study, and any other timely topics of interest to the Board. This workshop also provides time for executive staff to provide a year to date progress on LCAP goals and actions.

LEADERSHIP DEVELOPMENT – Created opportunities in CUSD to build staff leadership capacity through the creation of leadership positions at the elementary level. Implemented mentor program for new administrators as well as for those looking to advance their careers. Initiated coaching and leadership development for members of Leadership Team Council (LTC) throughout each year. Co-Developed a monthly leadership development training in Anaheim City School District (ACSD) for aspiring administrators. Served as a mentor in the CALSA Leadership Program to provide assistance to guide and empower a protégé to achieve her goals in education through passion, persistence, and integrity.

FISCAL SOLVENCY – Guided CUSD through fiscal recovery following the 2008 recession, implemented LCFF, and made necessary reductions as a result of deficit spending and declining enrollment (approximately 100 students per year for the past three years) while always maintaining positive budget certifications from LA County Office of Education.

INSTRUCTIONAL LEADERSHIP – Increased school and district API scores while under *No Child Left Behind*, and increased percentage of students meeting or exceeding standards on the Smarter Balance Assessments under *Every Student Succeeds Act*.

TECHNOLOGY IMPLEMENTATION – Initiated a one-to-one iPad program (grades 3-12) which allowed an increase in the use of on-line and blended instructional strategies and expanded the use of Learning Management Systems. Developed a comprehensive, multi-year professional development program to support all teachers with the implementation of instructional technology.

STEAM EDUCATION – Initiated STEAM education through the creation of K-6 Makerspace, Project based learning, and Linked Learning pathways with support from newly created Arts and Science/Technology Teachers on Special Assignment (TOSAs).

RACIAL EQUITY – Created a CUSD District Advisory Committee to meet monthly during the 2020-2021 school year to study racial equity throughout the District. This will also include professional development on racial equity for the Board of Trustees and Leadership Team Council, as well as student and community forums. Additional training for staff will be conducted in 2021-2022. Enlisted an outside consultant who has spent her life studying this work to facilitate these meetings and professional development.

PROFESSIONAL DEVELOPMENT – Implemented two additional workdays annually dedicated solely to professional development in CUSD. Professional development has included (but not limited to) training in Thinking Maps, Write from the Beginning and Beyond, Kagan instructional strategies, Multi-Tiered Systems of Support, Response to Intervention, Positive Behavior Interventions and Supports, Next Generation Science Standards, social-emotional learning (SEL), one-to-one devices in the classroom, Advancement Via Individual Determination (AVID) Elementary, *Wonders* English language arts adoption, *Go Math!* adoption.

FACILITIES – Established a Facilities Master Plan and subsequently passed a \$58 million general obligation bond in Claremont in 2016 after implementing a *grass roots* approach to garner community support, including hosting 70 community engagement meetings.

NEGOTIATIONS – Negotiated multi-year contracts with teachers and classified associations in CUSD. Implemented Interest-Based Bargaining with classified association in CUSD. While serving as chief negotiator for ACSD during 2009-2012, negotiated contracts that included unpaid work furlough days, increased class size, and increased employee contributions toward health and welfare benefits. Contracts were passed with over 90% support.

ITEM 3

JAMES M. ELSASSER, JR., ED.D.

Page 3

PROFESSIONAL ACCOMPLISHMENTS (continued)

DUAL-LANGUAGE IMMERSION – Implemented a K-6 Dual-Language Immersion program (Spanish).

INTERNATIONAL BACCALAUREATE MIDDLE YEARS PROGRAMME – Expanding the IB program to include the Middle Years Programme (in progress) and eventually the Primary Years Programme.

COMMUNITY PARTNERSHIPS – Developed collaborative relationships with booster organizations, Claremont Parent Faculty Association, Claremont Educational Foundation, Claremont After-School Programs, local businesses, city government, public agencies, local colleges, and community service organizations. Implemented a College and Career Access Pathway Partnership with Citrus Community College that allows students to have concurrent enrollment earning up to nine college units prior to high school graduation. Collaborated with Baldy View ROP to offer Career Technical Education classes and pathways to postsecondary education and careers. Developed a Partnership for Access to College Education agreement with the University of La Verne and Azusa Pacific University which will guarantee admission into these universities and provide a \$40,000 scholarship over four years to all CUSD students who meet the admission requirements.

COMMUNITY LEADERSHIP – Executive Board member for the Claremont Chamber of Commerce and staff liaison to the Claremont Educational Foundation.

LOCAL, STATE, AND NATIONAL SCHOOL AWARDS – California Distinguished School Awards, National Blue Ribbon School Award, Gold Ribbon School Award, Model Continuation High School Award, Green Ribbon School, and Top LA Public Schools for Underserved Students have been earned at multiple schools under my leadership in CUSD and Los Alamitos USD.

GOLDEN BELL AWARDS – Awarded by the California School Boards Association for the partnership between CUSD and the Claremont After-Schools Program which provides after school tutoring, homework support, and activities at multiple sites throughout Claremont; and for the robotics competition which is a collaborative project between CUSD and Harvey Mudd College.

APPLE DISTINGUISHED SCHOOL AWARDS – Four schools named Apple Distinguished Schools for continuous innovation in learning, teaching, and the school environment.

MEMBERSHIPS

Education Research and Development Institute – member since 2014
National Center for Education Research and Technology – member since 2014
Suburban School Superintendents – member since 2015
Association of California School Administrators – member since 1996
Southern California Superintendents – member since 2015
USC Dean's Superintendents Advisory Group – member since 2012
Rotary Club of Claremont – member since 2013
Claremont Chamber of Commerce – executive board member since 2012

REFERENCES

David Nemer, President, Board of Education, Claremont Unified School District (909) 621-2703
Nancy Treser Osgood, Vice President, Board of Education, Claremont Unified School District (909) 731-5848
Steven Llanusa, Clerk, Board of Education, Claremont Unified School District (909) 215-1290
Hilary LaConte, Clerk, Board of Education, Claremont Unified School District (909) 921-8863
Susan Preus, Former President, Board of Education, Anaheim City School District (714) 269-2091
David Chamberlain, President, Claremont Faculty Association (951) 966-4417
Amy Weiler, President, California School Employees Association, Chapter 200 (909) 525-7764
Tara Schultz, Claremont City Manager, (626) 644-1398

Additional References Available Upon Request

Appendix B

Client Letters of Recommendation



Office of the Superintendent
255 Pico Avenue, Suite 250
San Marcos, CA 92069

T 760.752.1299
F 760.471.4928
www.smusd.org

ITEM 3

August 18th, 2021

To whom it may concern,

It is my absolute pleasure to recommend Education Support Services Group (ESS) Beverly Hempstead and Suzette Lovely as extremely competent and capable experts for any district engaged in a superintendent search. The San Marcos Unified School District Governing Board was fortunate to employ ESS through the 2020-21 school year as we searched for our next superintendent, and I cannot recommend them highly enough.

With three newly elected Board members, there was a lot of learning for us. Beverly and Suzette provided clear direction on the importance of finding the perfect superintendent during a difficult time when the district was absent of leadership. These incredibly professional women took us step-by-step through the process of defining what we were looking for in a candidate, collecting information from all stakeholders, and compiling this information to create a job posting that would cast a wide net.

Suzette and Beverly directed the Board through a painstaking process of vetting dozens of highly qualified applicants to narrow down the search. They took their time to help us understand the process, see things from multiple angles, and helped us create an interview process that landed the perfect candidate for our district.

ESS was consistent with their messaging, very professional in every interaction, and demonstrated a deep understanding of this process which made every step a learning experience for all our board members. I believe the extensive experience both Beverly and Suzette have as former superintendents provides them with a unique perspective from which both new and existing board members will greatly benefit.

As a board member I was always fully informed as the process unfolded, with open lines of communication from beginning to end. I don't know how we would have completed the task of hiring a new superintendent without their assistance and guidance. I would highly recommend ESS and I look forward to working with them again.

If you have any questions, please feel free to contact me.

Sincerely,

Jaime Chamberlin

jaime.chamberlin@smusd.org
310-415-2115

16a

John A. Bowes, Ed.D.
Superintendent



Jason Boxer
Jennifer Cochran
Jen Fenton
Cathey Graves
Sally Peel

Manhattan Beach Unified School District

325 South Peck Avenue • Manhattan Beach • California 90266 • (310) 318-7345 • FAX (310) 303-3822

August 16, 2021

To Whom It May Concern:

Last spring, while managing school reopenings, in-person and distance learning platforms, curriculum changes, and second interim budget reports, the Board of Trustees for the Manhattan Beach Unified School District (MBUSD) was given an additional task. Our incredible Superintendent for over eleven years decided he would not renew his contract in June, and thus we needed to find a new leader. What felt impossible, given our own self-imposed deadline of hiring someone by July 1, was met with ease and professional integrity from the moment Education Support Services Group (ESS) submitted their RFP.

After reading eight applications from search firms across the nation, ESS stood out as the frontrunner. In addition to their experience with similar districts, they researched our community, watched previous board meetings, and had an expansive network of potential candidates to recruit from. During the public interview, ESS continued to shine. The firm presented a comprehensive timeline that corresponded to our district's calendar, explained the level of engagement and listening that would be conducted with various stakeholder groups, and most importantly, talked about utilizing this search process as a road for healing.

And as soon as ESS was hired, they prioritized MBUSD and finding our new Superintendent. In addition to analyzing previously compiled survey data about desired characteristics or experience from students, parents, and staff, ESS drafted a supplemental constituent questionnaire to develop a leadership profile and job description. ESS simultaneously conducted a compensation study and immediately began scheduling meetings with focus groups consisting of over 220 people. At every step of the way, our consultants provided in-depth updates, communicated regularly with the board, and made presentations at meetings to inform the public about the search.

As July 1 drew near, ESS remained calm, focused, and continued to demonstrate a level of expertise that aligned with our district's goals. They brought several highly-qualified candidates to the board for consideration and did extensive background research on each applicant. Not only did ESS coordinate two back-to-back days of interviews, they helped guide our conversation as we deliberated for several hours on which individual would best serve our district.

When our new Superintendent was finally selected, by the deadline we set, the consultants prepared a press-release, created a multi-tiered action plan to disseminate the news, and checked in daily to ensure a smooth transition. ESS constantly supported the board with resources that went beyond the scope of our search, and developed long-term relationships with those in our district. In fact, if we could hire ESS for every task or issue that falls within the scope of the board's purview, we would!

Our experience with the firm was truly exceptional from start to finish. And while it was sad to say goodbye to the former Superintendent, the board is confident that we found the best person to lead MBUSD into the future.

Best,


Jen Fenton

Manhattan Beach Unified School District, Board President



Board of Trustees

Kathy A. Thompson
President

Joan R. Weiss
Board Clerk

Stacy C. Henry
Trustee

Hugh M. Jackson
Trustee

Vacancy
Trustee

Administrators

Amy Nguyen-Hernandez
Superintendent

Lizette Diaz
Assistant Superintendent,
Student Achievement /
Educational Services

Michelle Dynes
Assistant Superintendent,
Human Resources /
Safety Preparedness

Lori L. Isom
Assistant Superintendent,
Business Services

There is no more important undertaking for a board of trustees than the search and hiring of a new superintendent. The Central School District has been fortunate to have had many years of stability, and our most recent superintendents have all come from within the organization. This made the task even more daunting for us. It was critical that we found a search firm that could help us find the perfect match for our district and its needs.

The Education Support Services Group became that firm for us. Having known Dr. Gary Rutherford for many years in mutual groups within the county, there was a fantastic basis of trust. Dr. Suzette Lovely was the perfect partner and the two were able to work together to determine the interests and needs of our district and reach out to those that could meet those needs.

The multi-step approach to the search was thorough in every detail. A clear overview of the services that would be provided allowed us to know every step of the process. The four phases, Engagement, Activation, Selection and Transition helped us as a district to determine our focus, refine our priorities and hear from all stakeholders. The board was involved in each phase and had input on everything from questions to be asked, whom to reach out to and timelines that would be most effective. Drs. Rutherford and Lovely provided frequent updates and were available anytime the need for clarification or concerns arose.

As president, what I most appreciated was the personal care that was taken to make sure that every trustee was involved, and their concerns and priorities were heard. No issue was too small or deemed inconsequential. There was a mutual goal to find just the right person to take us into the future. Every effort was taken to ensure that we got to that result. Having ESS to do the candidate screening, background checks and their knowledge of local professionals was a great reassurance to us as trustees, as there is no more valuable asset than the reputation of the district.

Our district is excited as we anticipate the future with our new superintendent. We look forward to forming a new governance team and know that we can reach out to ESS should the need arise. Drs. Rutherford and Lovely took an overwhelming task and made it a very positive experience for us as a leadership team. We are unified and ready to move into the future with great confidence for success for all stakeholders.

Sincerely,

Kathy Thompson
President, Board of Trustees

16c



**PLACENTIA-YORBA LINDA
UNIFIED SCHOOL DISTRICT**

1301 E. Orangethorpe Avenue
Placentia, CA 92870
www.pylusd.org

James Elsasser, Ed.D.
Superintendent

Board of Education
Marilyn Anderson
Leandra Blades
Carrie Buck
Karin Freeman
Shawn Youngblood

June 14, 2021

Dr. Suzette Lovely
Dr. Alan Rasmussen
Education Support Services
12800 Center Court Drive, Suite 300
Cerritos, California 90703

Dear Dr. Lovely and Dr. Rasmussen,

The Placentia-Yorba Linda Unified School District Board of Education recently conducted a superintendent search and contracted with ESS to facilitate this effort. The selection of a new superintendent is the most important decision that a school board can make. Therefore, it was of utmost importance to feel confident and comfortable with whomever we would select. Our Board has conducted a superintendent search in the past and knew what we wanted in a search firm. We are pleased to say that from the beginning to the conclusion of this search, the working relationship with the search team went as we hoped, and the results confirm that we made a good choice in hiring ESS.

The professionalism of Dr. Lovely and Dr. Rasmussen was evident. Their thoroughness in the initial presentation before the Board greatly aided in our decision of which firm to hire. They were very open to questions and transparent about all the steps that would be taken during the search timeline. At no time during the search were there any surprises.

Their recruitment brought forth highly qualified candidates to consider for interviews. We were impressed with the caliber of the candidates and the in-depth background checks of these individuals which assisted us in the determination of those we would interview.

Dr. Lovely and Dr. Rasmussen kept us current as we moved through the various steps. They were always easy to access, supportive, and responsive to any questions we had. They set a positive tone for the days we conducted interviews. Clearly, it was important that all participants (candidates and Board members) felt at ease and ready to have a conversation about the candidate's suitability for the position.

Without hesitation, we would recommend ESS and the search team of Dr. Lovely and Dr. Rasmussen to other school boards which find themselves in need of selecting a new superintendent. ESS will listen to you, work with you, and professionally guide you through this experience. We are grateful for the outcome, namely our new superintendent.

Sincerely,

Karin M. Freeman
Board President



SAN DIEGUITO UNION HIGH SCHOOL DISTRICT
Engaged, Inspired, Prepared

Superintendent Search Proposal

September 2021



HYA Executive Search
Hazard, Young, Attea & Associates

ITEM 3

August 27, 2021

San Dieguito Union High School District
710 Encinitas Blvd.
Encinitas, CA 92024

Dear Members of the San Dieguito Union High School District Board of Education:

Thank you for the opportunity to present this proposal of the services that Hazard, Young, Attea & Associates, (HYA) can provide in your search for a new Superintendent. We look forward to working with you. HYA has a long and successful history due to the following factors:

NATIONAL REACH – LOCAL KNOWLEDGE: We have conducted over 1400 searches and are represented by 100 associates across the nation. HYA began working with Boards more than thirty years ago in an effort to assist them in making the best leadership decisions possible. The consultants who will be working on your search, Dr. Carolyn McKennan, and Dr. Jacqueline Horejs have collectively completed over 80 searches. We recruit using our extensive network of national associates to bring to your search a national reach and as well as an understanding of the local context and the uniqueness of the San Dieguito Union High School District.

PROVEN TRACK RECORD: During a typical year, HYA conducts 40-60 executive searches per year. We find that the large quantity of searches the firm conducts puts us at a competitive advantage with respect to other search firms, in that our search volume places us in more frequent contact with a larger number of potential candidates. More than 85% of the superintendents selected have remained in their positions for at least five years.

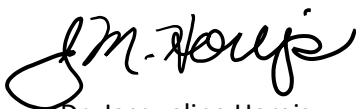
COMMUNITY ENGAGEMENT: We use a variety of methods to authentically engage the voices of all stakeholders. In addition to extensive focus group and individual interviews, we use a customized web based survey to obtain all stakeholders' perspectives. Information received from these processes helps identify the goals, needs, and priorities of the school system to help better match a candidate's skills with the needs of the District and gives valuable information to the Superintendent, day one of employment, to set goals and priorities.

CUSTOMIZATION: One of the hallmarks of our search process is the customization we offer to meet the unique needs of each district. We do your search your way. We have been successful in completing searches in both a virtual and a hybrid environment; we are committed to working closely with the Board to determine the most effective ways to find the very best candidates for the next San Dieguito Union High School District Superintendent.

Sincerely,



Dr. Carolyn McKennan



Dr. Jacqueline Horejs

ITEM 3

INTRODUCTION

Hazard, Young, Attea and Associates, (HYA) Proposes to conduct a national search for talented and highly qualified candidates for the position of superintendent of Schools for San Dieguito Union High School District (hereinafter referred to as District). This document serves to clearly outline the specific services, deliverables and costs proposed for San Dieguito Union High School District.

FIRM INFORMATION

We appreciate the opportunity to present this overview of services typically provided by Hazard, Young, Attea & Associates in a search for the position of Superintendent of Schools. Our firm has been working with Boards for more than 32 years, and our track record of successful placements is a reflection of HYA's ability to identify and attract highly qualified executives for superintendent positions.

HYA, a national firm with a home office in Schaumburg, Illinois, has assisted more than 1400 school boards with executive searches in its over 32-year history. HYA is represented by 100 Associates from throughout the United States who assist with the firm's mission to provide aggressive, thorough and quality assistance to school boards in need of identifying and recruiting highly qualified executives for executive positions. HYA is a national corporation focusing on executive searches, strategic planning, governance workshops, and goal setting and evaluations. HYA Associates work as independent contractors and are supported by employees of its parent company, ECRA Group, Inc. in the following areas: accounting/business office, IT services, marketing, administrative support, etc. Local search associates, Dr. Jacqueline Horejs and Dr. Carolyn McKennan will provide the services with support from the project team in the main office. HYA's associates bring extensive executive search experience and broad educational backgrounds to their practice. Through continuing involvement in district and university work, HYA associates are aware of current educational issues and have strong relationships with educational leaders and opinion-makers in administrative leadership and management. Over 85% of Superintendents hired in the last six years with HYA's assistance are currently in their same positions.

HYA's Signature Search Process consists of three main phases:



Engage Phase

HYA takes great pride in its commitment to community engagement and thoroughness of the processes used to gather input. We have a strong reputation for deep and meaningful engagement at stakeholder forums, community interest group meetings and individual interviews. The Engage Phase can be provided in person or virtually depending on current state and local requirements. HYA also uses a locally designed survey and is presented with disaggregated data by stakeholder group. Some of the most important deliverables during the engagement phase of the search include the following:

ITEM 3

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

The HYA team will work with the Board to customize an approach to stakeholder engagement that takes into consideration current status of social distancing and the specific needs of the district community. Long before Covid-19, our firm was conducting online community forums. In addition, with current travel and meeting restrictions we have recently conducted on-line focus groups with students, staff, alumni, community groups, city and county council members, etc. HYA has also reported and presented to school boards at public meetings and in closed sessions using the whole array of digital platforms.



Recruit Phase

We use a myriad of recruiting techniques to ensure we are reaching out to all potential candidates. The Recruit Phase consists of national and regional advertising packages for Board consideration and leveraging HYA's extensive national network of Associates and incorporating advertising strategies. Our Associates throughout the country are aware of outstanding superintendents and aspiring superintendents in their state and region and maintain close professional relationships with many educators and school district leaders who might be interested in making a job change or a career move. We have ongoing relationships with state and national superintendent organizations and leaders so that they can recommend candidates to us. We have Associates who serve on the Boards of the American Association of School Administrators, the California Association of Latino Superintendents and Administrators, the CA African American Association of School Administrators, and the National Alliance of Black School Educators. Associates are kept informed of the searches the firm is conducting and we seek recommendations from them regarding candidates who fit the profile being sought for that district. The proof of our recruiting network and efforts is the fact that approximately two thirds of the candidates ultimately selected by Boards with whom we work were recruited for the position rather than self-selected or self-nominated. The deliverables during the recruitment phase include:

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

ITEM 3

- Identify best qualified candidates;
- Prepare application materials of selected slate of candidates for Board consideration.

SCREENING CANDIDATES

Reference checking is one of the most important tasks in the search process. We often begin with the informal references of referrals for potential candidates. Once an individual moves to the level of a potential candidate through the application process or through recommendations and recruitment efforts, we begin our vetting process. This includes contacting the listed references on the application or provided by the candidate. While this step is necessary it is not sufficient as most candidates will provide references that will provide only highly favorable comments. We continue the vetting process by conducting comprehensive internet searches to review any public information regarding the candidates. HYA Associates conduct confidential reference calls to obtain deep insight on any candidate that would be recommended to the Board for consideration. Given our network of Associates and many professional relationships, it is likely that we know someone who either knows the candidate directly or knows someone who knows the candidate. These references often provide confidential, hard-to-obtain information about the candidate that is invaluable in determining whether or not to recommend the candidate to the Board.

Two additional steps are recommended towards the end of the selection process, before any public announcement: a comprehensive independent background check by an outside firm and a site visit. The comprehensive background checks can be conducted on the single finalist or on the three semi-finalists that the Board brings back for second interviews. These are not simple background checks by searching a social security number. The due diligence background checks are conducted by a third-party entity and include checking on issues related to criminal and civil court records, financial records, driving records, college degrees and university accreditations. They can also include print and social media reviews. The site visit is optional, and is typically completed on the sole finalist once a selection is made but before a contract is signed.

**Select Phase**

HYA believes that the Associates are responsible for supporting the school board in all phases of the search. This is particularly true during the interview process for semi-finalists and finalists because we want the Board members focused on assessing the candidates, not managing logistics. The Associates are available during the interview process to ensure that all runs smoothly and to facilitate debriefing the interviews and what the Board learned about the candidates. Some of the specific deliverables during this phase include:

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

ITEM 3

- The Board’s decision to hire or not hire a particular candidate is at the sole discretion of the Board; and the Board takes responsibility for that decision.

Upon completion of screening interviews conducted, the Associates will present a slate to the Board. The number of candidates on the slate will have been determined by the Board during the initial Planning Session. Prior to presenting the slate (or in a separate advance session, if preferred), the consultants will conduct a seminar for the Board designed to prepare for candidate interviews. This workshop will include written guidelines and protocols to ensure informative and comprehensive interviews. Approximately one to two hours in length, the workshop will also review the steps in the final stages of the search.

Prior to this workshop, HYA will solicit questions, hypothetical situations and/or topics of interest, identified by the Board as desirable topics of discussion for the Board’s initial interviews with the candidates. Such feedback will be developed into an Interview “Script,” which will be reviewed and revised during the aforementioned workshop and then used by the Board during the first round of interviews. The second interviews are generally unscripted and designed to follow-up on topics and questions identified during the first interviews.

The consultants will facilitate each decision-making session of the Board, if desired. Such involvement permits more active engagement by all Board members in both the general search process and the specific dialogue regarding the candidate pool. In facilitating the decision-making process, HYA assists the Board in assessing the abilities of the respective candidates in relation to the criteria identified by the Board.

**Transition Phase**

At the conclusion of the selection process, HYA offers a combination of included services and optional services to assist with the transition of the new superintendent. The included services are:

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

THE SEARCH TEAM

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

ITEM 3

HYA ASSOCIATE	CELL PHONE	EMAIL
Dr. Carolyn McKennan	831-295-0982	carolynmckennan@hyasearch.com
Dr. Jacki Horejs	408-843-6434	jacquelinehorejs@hyasearch.com

The Director of Operations, Daneyelle Martell, serves as project manager and can be reached at 847-744-5640.

Dr. Carolyn McKennan serves as Senior Associate, Hazard, Young, Attea & Associates (HYA) and was previously the West Coast Regional President of HYA. Before joining HYA, she served 16 years as a school superintendent in two California districts. During her years with HYA she has completed seventy searches on behalf of the firm including those in Arizona, California, Montana, Oregon, and Washington. HYA is a national search firm with 120 associates representing most of the states in our country. She is nationally known having presented at many conferences including the American Association of School Administrators (AASA) and the Association of Latino Superintendents and Administrators (ALAS). She has worked closely with the California Association of African American School Administrators (CAAASA) and the California Association of Latino School Administrators (CALSA). Her leadership and collaborative style are well known throughout the educational community including the many school boards she has served.

Jacqueline Horejs, Ed.D. Associate of Hazard, Young, Attea & Associates (HYA) has a wealth of experience working in education. Her educational background includes a Bachelor of Arts Degree from the University of Illinois, a Masters from San Jose State University, and a Doctorate in Educational Leadership from the University of Southern California. Prior to working as an Educational Consultant, she most recently served nine years as the Superintendent of Union Elementary School District in San Jose, CA. During her tenure as Superintendent she was elected to serve as the Chairperson of the Santa Clara County Superintendents Association and was the President of the California City Schools Superintendents. Additionally, she was a presenter at the ACSA Superintendents' Academy, networking with executive level administrators aspiring to become Superintendents. An acknowledged leader of leaders, Dr. Horejs was selected as the Association of California School Administrators (ACSA) Assistant Superintendent of the Year, and served as ACSA's Region 8 President. She has extensive experience at all levels of site, district, county and regional administration. In addition to working as a site administrator, she has served as the Director of Educational Services for the Santa Clara County Office of Education as well as the Regional Director for the Statewide System of School Support providing services to districts in five counties. Most recently Dr. Horejs has provided executive leadership services. For the past six years she has been an HYA Associate conducting over a dozen Superintendent and Cabinet level searches and providing Board Governance workshops. In addition to her work on executive searches, Dr. Horejs teaches in the Administrative Credential Program and also coaches Superintendents and other administrators. She has a reputation as a highly professional and collaborative leader and is well respected in the educational community she has served.

ITEM 3

REFERENCES

HYA's reputation for effectiveness and integrity is extremely important. The following references were chosen because the Board worked with the HYA Associates being proposed for the search or because the district has a similar demographic profile to San Dieguito Union High School District. The reference contact information includes the Board President of the District.

DISTRICT NAME	REFERENCE NAME	CONTACT INFORMATION
Cupertino Union SD, CA	Lori Cunningham	cunningham_lori@cusdk8.org
Palo Alto Unified SD, CA	Ken Dauber	kdauber@pausd.org 650-906-4340
Campbell Union High School District, CA	Linda Goytia	loytia@cuhsd.org 408-230-7414
Portland Public Schools, OR	Amy Kohnstamm	akohnstamm@pps.net 503-916-2000

In addition to the references listed above, an extensive list of national searches our firm has completed since 2015 is attached.

FEES

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

- A. Consulting Fee for the search in the amount of \$25,000. This fee is due in three installments:
 - 50% will be invoiced upon execution of the contract/agreement
 - 25% will be invoiced upon presentation of the Leadership Profile Report
 - 25% will be invoiced upon presentation of the slate

- B. Based on past experience, HYA has designed advertising packages to maximize exposure for the vacancy. The Board will choose the package that best suits their needs. The cost is approximately \$1,200.

Optional Additional Services

- C. If the Board chooses to reimburse candidates for travel for interviews, candidates will submit their expenses directly to the district for reimbursement.

- D. Advertising on HYA's webpage (over 18,000 page views on our Active Search page per month) and social media pages are included in the consulting fee. Based on past experience, HYA has designed advertising packages to maximize exposure for the vacancy.

- E. Background checks/Executive Due Diligence Services, if desired and selected by the Board, the cost ranges from \$1105 - \$1950 per candidate.

ITEM 3

F. Printing and Postage; HYA is a green corporation whereby all documents related to the search will be provided via a Board portal. If the Board wishes to have hard copies, 5% of the Consulting Fee will be added to the agreement as an additional fee to cover the costs associated with printing, binding and shipping all materials.

G. A research-based on-line Community and Leadership Profile Survey is available in English and Spanish to provide the Board with a detailed analysis of the needs of the district and the top attributes and characteristics desired by the community, parents, teachers, staff, and students. The cost of this analytical report is \$2,000. If the district wishes to offer the survey in additional languages, the fee is \$415 per language.

GUARANTEES**Fixed Price**

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

Non-Solicitation of Selected Candidate

The Superintendent appointed with HYA's assistance will not be presented to another Board as a candidate if it would result in the Superintendent leaving the district within three (3) years of employment unless the Board provides written authorization to HYA that they may do so.

Client-Satisfaction

If the Superintendent departs from the position during the first year under any circumstances or within two (2) years if a majority of the Board is still in place and departure is due to dissatisfaction and not personal or familial reasons, HYA will recruit new candidates for the Board at no additional cost barring travel, advertising and due diligence expenses.

Price Match

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

Reimbursable Expenses

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

ITEM 3

**San Dieguito Union High School District
Suggested Traditional Search Calendar – September 2021 – Dec. 2021**

Date	Activity
September 16 Regular Board Meeting	Board Planning Meeting to develop schedule
September 17 – Oct. 10	Begin online advertising Individual Interviews w/Board members Leadership profile Focus groups: Consultants meet with staff, parents, community members and local officials designated by the Board. Online Survey available to public for completion Advertising through Oct. 30
October 14 Regular Board Meeting	Board meeting to present, review Leadership Profile Report (LPR)
October 30	Recommended application deadline - applications will still be accepted until position is filled.
Week of Nov. 1	Top candidates interviewed by consultants.
Nov. 18 Regular Board Meeting – closed session	Consultants meet with the Board to identify slate of semifinalists - plan initial interviews and develop questions (open and closed session)
Week of November 22	Board interviews slate of semifinalists. The Board will meet with consultants at the conclusion of the interviews; consultants will conduct extensive background checks on the finalists. Two days for interviews are recommended to be calendared.
Week of November 29	Board Second interview with finalists. <i>Details of the second interview will be determined after the semifinalist interviews. If the Board chooses to have an Advisory Committee participate in the final selection, this will be scheduled.</i>
After interviews	Board will meet with consultants immediately following final interview to determine preferred candidate
Week of December 6	Finalize contract
December 14 Regular Board Meeting	Introduce superintendent

ITEM 3

Suggested "Light" or Expedited Search Calendar Sept. – Nov. 2021

Date	Activity
September 16 Regular Board Meeting	Board Planning Meeting to develop schedule
September 17 – Oct. 1	Begin online and print advertising Individual Interviews w/Board members and key decision makers to determine selection criteria. Online Survey available to public for completion
October 9	Recommended application deadline - applications will still be accepted until position is filled.
Week of October 11	Candidates prescreened and interviewed by consultants.
October 14 Regular Board Meeting	Board meeting to present, review Leadership Profile Report (LPR)
Week of October 18 Special Board Meeting – Closed Session	Consultants meet with the Board to identify slate of semifinalists - plan initial interviews and develop questions (open and closed session)
Week of October 25	Board interviews slate of semifinalists. The Board will meet with consultants at the conclusion of the interviews; consultants will conduct extensive background checks on the finalists. Two days for interviews are recommended to be calendared.
Week of October 25	Board Second interview with finalists. <i>Details of the second interview will be determined after the semifinalist interviews.</i>
After Interviews	Board will meet with consultants immediately following final interview to determine preferred candidate
Week of Nov. 1	Finalize contract
Nov. 18 Regular Board Meeting	Introduce superintendent

ITEM 3

Throughout the search process, the Associates will update the Board with regular weekly emails and/or phone calls, depending on the preferences of Board members. We recommend that the Board appoint a liaison, usually the Board President, to interface with Associates on logistical matters. HYA Associates are available 24/7 to address questions and concerns from Board members.

Optional “Light Recruitment” Draft Scope of Services

Please note: We will work with the Board to customize any and all aspects of the search. The draft of “light” or expedited scope of services below is meant to serve as a basis for collaborative conversation with the Board.

The following services could be included in this option for a reduction in fees:



Engage Phase

Input from Board members and key decision makers, identified by the Board, will be interviewed by HYA Associates. School and community stakeholders will provide input and feedback on the selection criteria through a locally designed online survey.



Recruit Phase

The amount of time scheduled and the number of media used for advertising and recruiting will be reduced.



Select Phase

HYA Associates will provide the same level of service during the selection process with the exception of not providing assistance if the Board decides to include a Community Advisory group and/or a site visit for input into the selection process.



Transition Phase

The same level of services will be provided in the transition phase.

We will work with the Board to customize any and all aspects of the search.

CAROLYN K. McKENNAN, Ed. D.

PROFESSIONAL EXPERIENCE

2018-2021 Senior Associate, Hazard, Young Attea & Associates, Executive Searches
 2003-2018 West Coast Regional President, Hazard, Young, Attea & Associates, Executive Searches
 2005-2012 Member Services Representative, Association of California School Administrators, Region 5, San Mateo-San Francisco County, Region 8, Santa Clara County
 2008-2010 Pivot Learning Partners, Executive Coach
 1996-2005 Superintendent of Schools, Morgan Hill Unified School District (CA)
 1990-1996 Superintendent of Schools, Soquel Union Elementary School District (CA)
 1989-1990 Assistant Superintendent Instructional Services, San Luis Coastal Unified School District (CA)
 1988-1989 Associate Superintendent Administration and Instructional Services Sunnyvale Elementary School District (CA)
 1987-1988 Acting Superintendent, Sunnyvale Elementary School District (CA)
 1986-1987 Associate Superintendent Curriculum and Instruction, Sunnyvale Elementary School District (CA)
 1985-1986 Executive Director Curriculum and Instruction, Billings Public Schools (MT)
 1973-1985 Principal, Elementary-Junior High School, Billings Public Schools (MT)
 1967-1973 Teacher, Billings (MT)

EDUCATION

Ed.D. 1992 University of Southern California, Policy Planning and Administration
 M.S. 1973 Montana State University, Billings, Ed Administration
 B.S. 1967 Montana State University, Billings, Special Education

PROFESSIONAL AFFILIATIONS

Member (by invitation) Northern California Superintendents, 1996-present
 President, Superintendents Council, Association of California School Administrators, 2002-2005
 President, California City School Superintendents Association, 2000-2001, Secretary 1999-2000
 Association of California School Administrators Curriculum Management Audit Committee Governance Council, member, 1997-2003
 Chairperson, Mentor New Superintendent's Workshop, Association of California School Administrators, Program, 1993-1994
 President, Santa Cruz County Administrative Women in Education, 1992-1994
 Vice President, Legislative Action, Santa Cruz Chapter, Association of California School Administrators, 1992-1994
 American Association of School Administrators
 Association for Supervision and Curriculum Development
 Phi Delta Kappa

HONORS (selected)

Elected President, Association of California School Administrators Superintendency Council, 2002-2005
 CA School Boards Association, Superintendent's Advisory Council, appointed representative, 2003-2005
 Association of CA School Administrators, elected representative, Region 8 Superintendency Committee
 Association of School Administrators Legislative Policy Committee, 1997-1998
 American Association of School Administrators, California Delegate
 Association of CA School Administrators, elected representative, Region 10, Superintendency Committee, 1995-1998
 Montana State University, Senior Level Traineeship (tuition, fees, stipend)

Jacqueline M. Horejs, Ed. D.

EDUCATION

1996	University of Southern California	Ed.D. - Educational Leadership
1991	San Jose State University	Masters Educational Leadership
1971	University of Illinois	Bachelor of Arts Education

PROFESSIONAL EXPERIENCE

2016-Present

- Hazard, Young, Atea & Associates – **Associate**
- Superintendent and Administrator **Coach** (Santa Clara and San Mateo counties)
- Executive Leadership Center (ELC) Superintendent Seminar **Facilitator**
- **Instructor** – Administrator Credential Program, Santa Clara County Office of Education
- Educational Leadership **Consultant**
 - Board/Superintendent Governance Workshops
 - Board/Superintendent Goal Setting and Evaluation Workshops

2006-2015 ***Superintendent of Schools, Union School District, San Jose, CA***

2001-2006 ***Asst. Superintendent Educational Services, Gilroy Unified School District, Gilroy, CA***

1999–2001 ***Director, Educational Services Santa Clara County Office of Education***

1998–1999 ***Administrator, Standards and Assessment, Santa Clara County Office of Education***

1994–1998 ***Principal, Moreland Elementary School District, San Jose, CA***

1993-1994 ***Asst. Principal Middle School, Moreland School District, San Jose, CA***

1990-1993 ***Assistant Principal, Gilroy Unified School District, Gilroy CA***

PROFESSIONAL AWARDS, AFFILIATIONS AND ACTIVITIES

President, California City Schools Superintendents, (CCSS) 2013/14
 Vice President, California City Schools Superintendents, (CCSS) 2012/13
 Chairperson, Santa Clara County Superintendents Association, 2007/08
 Assistant Superintendent of the Year, ACSA Region 8, 2004
 ACSA Region President
 ACSA Region 8 Vice President Legislative Policy
 West Valley ACSA Charter President
 West Valley AFSA Executive Board
 Association for Supervision and Curriculum Development (ASCD)
 American Education Research Association (AERA) Presenter, 1997
 University of Illinois educational scholarship

Letters of Recommendation

ITEM 3

#1.

August 25, 2021
San Dieguito Union High School District
710 Encinitas Blvd.
Encinitas, CA 92024

Dear Board Members,

I am writing to highly recommend the search firm of Hazard, Young, Attea & Associates (HYA). As a member of the Union School District (USD) Board, I have personally worked with the associates from HYA for our past two superintendent searches, and I can attest to the high quality of their processes and overall services and professionalism.

As soon as HYA was selected to the search, a planning meeting with the Board in open session was held during which a detailed outline of the entire search process was agreed upon and made available to the public. Regular updates on the search were provided to Board members and were posted on the district's website. All non-confidential information was transparently communicated to stakeholders and confidential information on candidates was made available only to Board members through HYA's applicant portal. Throughout the process, HYA associates in both searches were available to answer any questions Board members had.

In both of the searches HYA did for USD, our timeline for beginning the search was later than was optimal, but the search consultants did an amazing job of reaching out and identifying candidates who matched what we were looking for in our next superintendents. In both cases, we had a robust pool of candidates, all of whom could have successfully done the job. We all felt that the search consultants did an excellent job of finding and vetting the candidates to bring forward to us as "Tier 1 candidates" - those who most likely met the criteria we required.

For the first search we did with HYA, the entire process was in person; for the second search it was entirely virtual except for the final interview with finalists. In each of these environments, HYA provided second to none services. The outreach to school and community stakeholders to gather input on the selection criteria was thorough and yielded important information to the governance team as we moved forward with a new superintendent at the helm.

I recommend Hazard, Young, Attea, & Associates without reservation. They will do all that they can to ensure that the San Dieguito Union School District has an exemplary leader and member of your governance team.

Please feel free to contact me if you have any questions, (408) 888-3268.

Sincerely,



Sheila Billings
Union School District
Board of Education Former President
Current Board Vice-President

ITEM 3

#2.

To any Board engaged in selecting a search firm:

Five years ago, when I was serving as a Board President for the Campbell Union HSD, I conducted brief but intensive research into the consultants available to us. I spoke with Board Members from 40 districts over a nine-day period. Data and comments gathered in this process were shared with the Board which voted to engage HYA.

We were very satisfied with our choice, both in terms of process and result. Carolyn McKennan and her colleagues were incredibly responsive, thorough, and professional. It was a pleasure to work with them, start to finish, and their guidance was invaluable. We received a binder filled with useful information and a timeline for all steps to be completed. Each board member was surveyed, both in writing and in person, to assist the firm in building an understanding of our vision of a "perfect" superintendent. We were advised with regard to pitfalls to avoid, positive steps to take and process options.

The Superintendent we hired as a result has been with us now for five years and has just received a positive evaluation for his guidance of our District through the fiasco of the pandemic. We are very grateful to HYA for a job well done.

Linda Goytia,



Trustee, Campbell Union High School District
Board President, MetroEd / Silicon Valley Career Technical Educaiton
408-230-7414
lgoytia@cuhsd.org

#3.

ITEM 3

August 31, 2021

I am serving my 25th consecutive year as a trustee of the Mountain View—Los Altos Union High School District (“MVLA”), after having served 13 years consecutively as a trustee of the K-8 Los Altos School District (for which MVLA is the high school district). Those 38 years provided five occasions on which I was one of five trustees who chose a search firm to find candidates worthy of being the superintendent. Four of those occasions gave prospective search firms a relatively easy task: find candidates who could come to a high performing district already functioning well, and fine-tune it to make it even better. The search firms responding to our RFPs seemed indistinguishable, whether by their written proposals or their in person interviews, both of which showed them all to be content merely to follow an industry standard cookbook recipe.

The other occasion presented a substantially more difficult task: find candidates who could manage increasingly militant teachers, fear spreading divisively among parents about academic stress, and the social problems often attendant upon a burgeoning, ever more culturally diverse population. On this occasion, I was board president, and our board was determined to hire a firm that demonstrated convincingly its service would be customized to our district’s then current state of affairs.

Among the respondents to the RFP, only HYA succeeded in making that demonstration. When we asked for more information from respondents, they were the first to provide what was requested, and by far the most thorough in their responses. They took great pains to ask insightful questions about our district and to attend closely to the details that set a carefully considered development of a plan apart from a perfunctory one.

After we hired HYA, I worked closely with Diane Siri and Carolyn McKennan. Julie Haff, the third member of their team, operated in the background as the data analyst. She did a superb job of distilling the data Diane and Carolyn had diligently amassed, thereby making those data informative. My board colleagues were free to communicate directly with Diane, Carolyn and Julie, but chose for the most part to communicate through me.

The HYA team fashioned an inclusive and comprehensive process that left all our stakeholders feeling assured that their voices had been heard and understood, and would be taken into account by the board. Importantly, the board—with HYA’s support—firmly made clear that only it would be interviewing candidates.

Recruiting applicants, culling the viable ones, doing background checks, preparing three-paragraph summaries of viable applicants, working exhaustively with the full board to identify those who would get a first interview, and preparing the board for the first interviews were among the areas in which HYA’s performance stood far above those of the four other search teams whose efforts I had experienced. Unlike those other search teams, HYA did not balk at the board’s insistence that the first half-hour of finalists’ second interview be used for them to produce, in person on a district provided air-gapped computer, a written response to a board-produced prompt that they would see for the first time upon their arrival. Nor did HYA object to the board’s not using set questions in the second interviews. In the end, the candidates who got second interviews were so good that the board had a hard time choosing one. We did, of course, and could not be happier with our choice. HYA’s dedication, communication, and collaboration left each board member with high esteem for their service, and the good feeling that they had more than earned their fee.

With my best wishes for a successful search,
Phil Faillace

Example Resumes of Successfully Placed Candidates:

Donald Austin, Ed.D.

949-243-5580

Skills

Respected leader
Student advocate
Relentless work-
ethic Trusted
mentor
Successful leadership in high-demand
environments Strategic thinker

Professional Experience

Palo Alto USD, Superintendent of Schools

2018 - Present
10,500 students | 2,000
employees

Leading the top-ranked comprehensive school district in the state, while finding ways to continuously improve. Partnering with local Stanford University, Silicon Valley technology industry giants, and local officials to maintain our profile as a model for public education. Serving as a mentor to superintendents across the state, and advocate for students at the highest legislative level, and considered a top contributor to the profession of school administration.

- Niche #1 ranked K-12 school district in California
- Developed a "Fortune 500" approach to school district management First Santa Clara County School District to reopen after closures State and national leader
- for safe return to schools
- Association of Latino Administrators & Superintendents National "Fab Five" Leadership Award

Palos Verdes USD, Superintendent of Schools

2014 - 2018
11,400 students | 1,600 employees

Led high-profile and demanding school district into unparalleled success. Created efficient and streamlined ways of reaching all students, despite having no school bonds, no additional local taxes, no concentration money, and a tiny unduplicated count.

- Niche #6 ranked K-12 school district in California
- Maximized outcomes for school district with bottom 10% per pupil funding in California Developed succession plan pipeline still producing results

ITEM 3

- Implemented the “Yearly Results Book” to measure progress against established goals publicly
- Created Tier I and Tier II administrative programs free of charge to aspiring leaders

Huntington Beach UHSD Assistant Superintendent, Educational Services

2011 - 2014
16,000 students | 2,100 employees

Served in the #2 position supporting six comprehensive high schools, a continuation school, and a large Adult School. Led all aspects of the Educational Services division, including curriculum and instruction, special education, instructional technology, student services, and

Laguna Beach USD, High School Principal

2007 - 2011
950 students | 140 employees

Led California Distinguished School and National Blue Ribbon, Laguna Beach High School, in affluent and high-demand area of Orange County. Made significant changes to policy and culture resulting in CSBA Golden Bell and College Board AP Honor Roll for under-represented student participation and success.

Alvord USD, High School Principal

2001 - 2007
3,200 students | 265 employees

Led large urban high school through tremendous growth. Students experienced 125 points of improvement in state accountability system (API) during tenure. Became an AVID National Demonstration School and had 400% increase in Advanced Placement participation.

Yucaipa-Calimesa JUSD, Middle School Assistant Principal

1999 - 2001
1,100 students | 80 employees

Teacher / Activities Director

1994 - 1999

References

- Shounak Dharap
Board of Education President,
PAUSD

- Jennifer DiBrienza
Board of Education Member,
PAUSD

ITEM 3

- Ed Shikada
City Manager, City of Palo Alto

██████████

- Marc Tessier Lavigne
Stanford University,
President

██████████

- Wes Smith
ACSA, Executive
Director

██████████

- Maria Armstrong
ALAS, Executive
Director

██████████

- Kevin Gordon
Capitol Advisors,
President

██████████

P H O N E (9 2 5) 3 3 2 - 6 4 9 4 • E - M A I L

N E L L I E M E Y E R @ C O X

NELLIE MEYER

OBJECTIVE

To create a positive district wide culture that produces positive results for all students.
To make a positive difference in the lives of our students and to prepare all students for success in post high school.

SKILLS

Strong Interpersonal Skills

Successful Superintendent Experience

Published Author of Professional Guidance

WORK EXPERIENCE

2019-present Mountain View Los Altos Union High School District, Mountain View, California

Superintendent

Mountain View Los Altos High School District is a top rated public school serving 4,548 students offering a world-class education with AP and SAT scores among the highest in California. The Superintendent works to create a balance between supporting all students and maintaining high academic standards in their two high schools.

2013-2019 Mt. Diablo Unified School District Concord, California

Superintendent

The Superintendent creates the district wide vision with the Board of Education. Responsible for managing a 450 million budget, works with seven bargaining units, provides leadership for the district and community in pursuit of student success.

- Responsible for 56 campuses Pre-K to Adult Education
- Created Middle College: College Now
- Implemented International Baccalaureate Diploma Program
- Increased College and Career Pathways
- Created and Implemented eight magnet schools
- Developed counseling program K-12
- Led successful Bond Initiative with a 70% pass rate
- Strengthened Partnerships with Business Partners and Higher Education Partners

2010-2013 San Diego Unified School District**San Diego, California***Deputy Superintendent*

The Deputy Superintendent plans, organizes, controls and directs the following divisions:

- School to Career Education
- Instructional Support Services
- Federal and Special Programs
- Gifted and Talented Education
- Office of Language Acquisition
- Standards, Assessment and Accountability
- Enrollment Options
- Magnet School Program
- Dropout Prevention

The Deputy Superintendent also serves as a member of the Superintendent's Cabinet.

Under my leadership, San Diego Unified experienced six successive years of academic growth.

2010-2010 San Diego Unified School District**San Diego, California***Chief Elementary School Improvement Officer*

- Responsible for 133 Elementary Schools
- Served on Superintendent's cabinet
- Supervised five School Improvement Officers, principals, parent support liaisons, and classified staff
- Accountable for 50,000 students' academic success
- Created Professional Development for Elementary campuses
- Facilitated board reports on initiatives regarding district wide efforts
- Evaluated and monitor site operations and educational programs
- Represented the district on committees and organizations including partnerships with local agencies and Universities
- Collaborated and worked with parents and the community
- Communicated and partnered with community organizations
- Monitored and implemented Transitional Kindergarten
- Administered literacy, math, and Science benchmarks district wide
- Implemented and monitored Response to Intervention intensive services
- Responsible for K-12 Positive Behavior Implementation Program
- Worked with media to publicize ongoing efforts of our elementary schools
- Collaborated with the County Office of Education

2009- 2010 San Diego Unified School District**San Diego, California***Executive Director Dropout Prevention*

- Created and implemented a district wide community partnership/Task force to evaluate all policy impacting drop outs
- Created a department vision and implementation plan for a wide range of student support initiatives
- Supervised district wide support for the California High School Exit Exam
- Facilitated board reports on initiatives regarding district wide efforts in dropout prevention

ITEM 3

- Responsible for K-12 Positive Behavior Implementation Program
- Communicated and partnered with institutes of higher education
- Evaluated and monitored Credit Recovery Program
- Coordinated and presented Professional Development for Graduation Coaches
- Supervised staff responsible for District wide dropout initiatives
- Supervised and directed implementation of Assembly Bill 342
- Worked with media to publicize ongoing efforts of community to support at risk youth
- Worked with public officials in San Diego, Sacramento and Washington D.C regarding issues of dropout, High School exit exams, NCLB legislation's impact on at risk youth
- Developed Community wide task forces surrounding student support
- Represented the district on committees and organizations including President Steven Weber's
- SDSU Admission Advisory Board, ConnectEd
- Monitored and implemented grants including 21st Century/ASSETS, and other support via community partnerships
- Collaborated with the County Office of Education on joint projects including AVID and After school programs
- Supported Eighth grade support programs at all 22 of our district middle schools
- Facilitated innovative student supports including ninth grade attendance, mentoring "10 to succeed." and online learning
- Evaluated and monitored ongoing supports for students at risk.

2008-2009 San Diego Unified School District San Diego, California

Chief High School Improvement Officer

- Responsible for 33 High Schools including comprehensive, small school, atypical and alternative models
- Served on Superintendent's cabinet
- Supervised two School Improvement Officers, principals, parent support liaisons, and classified staff
- Accountable for 36,000 students' academic success
- Evaluated and monitored site operations and educational programs
- Represented the district on committees and organizations including President Steven Weber's
- SDSU Admission Advisory Board, ConnectEd
- Collaborated and worked with parents and the community regularly in pursuit of student success
- Communicated and partnered with institutes of higher education
- Monitored and implemented grants including Small Learning Communities, Advanced
- Placement Incentive Grant, Carnegie, ConnectEd Implementation (co-principal), 21st
- Century/ASSETS, Early College High School, and other support via community partnerships
- Administered Preliminary Scholastic Aptitude Test (PSAT) district wide

ITEM 3

- Implemented and monitored programs in high schools to increase graduation including APEX Online Credit Recovery, Project Recovery, MyACCESS Online Writing tool, Turn-It-In online
- Implemented and monitored California High School Exit Exam (CAHSEE) intensive services
- Major accomplishments in high schools include:
 - Decrease in drop out rate from 17.8% in 2006-07 to 9.3% in 2007-2008
 - Decrease in suspension rate from 20.1% to 19.81%
 - Decrease in average expulsion rate from .60% to .36%
 - Increase in the CAHSEE pass rate in 68% of high schools
 - Increase in average attendance rate from 84.42% to 87.51%

2006–2008 San Diego Unified School District San Diego, California
Assistant Superintendent of High Schools

- Responsible for 33 High Schools
- Supervised 33 principals
- Accountable for 36,000 students
- Evaluated and monitored site operations and educational program
- Represented the district on committees, organizations
- Collaborated and worked with parents and the community
- Communicated and partnered with institutes of higher education
- Monitored and implemented grants including Small Learning Communities, Advanced Placement Incentive Grant, Carnegie and other support via community partnerships

2001–2006 San Diego Unified School District San Diego, California
Principal, Clairemont High School

- Instructional leader of a comprehensive high school
- Supervised thirteen district administrators
- Successfully secured the AP Incentive grant, GEAR UP, AVID mentor grant
- Increased AP offerings from 5 to 17 courses
- Implemented AVID school wide
- Increased AVID from 3 to 8 elective sections
- Demonstrated ongoing academic growth on California Standards Tests
- Led campus out of state intervention

1999–2001 San Diego Unified School District San Diego, California
Vice Principal, Pershing Middle School

- Created master schedule, all school schedules
- Supervised and evaluated teachers
- Provided professional development in Literacy strategies
- Created school wide discipline plan

1989–1999 San Diego Unified School District San Diego, California
Teacher, Grades 6-12

Credentials:

- Social Science
- English
- Language Development Specialist

ITEM 3

Experience teaching: Psychology, Economics, U.S. History, World History, Advanced Humanities, Reading, Pre-Algebra

1982–1989

San Diego Unified School District

San Diego, California

Teacher's Assistant

Doctorate Educational Leadership: Dissertation focus: Student Voice/Dropout Prevention in Continuation Schools

ACCREDITATIONS

- California State Schools Superintendents, Vice President
- Presenter at California School Boards Association: *Creating Individualized Professional Learning for Teachers*
- Kappan Award: Educational Leadership
- Presenter at the Secretary of Education's High School Summit/Sacramento Topic:
 - *Turning a School Around, Strategies for Success*
- Presenter at National AVID conferences: *Creating AVID School wide: represented the San Diego Unified District as both Principal and Assistant Superintendent on expert panels*
- Presenter at the Greater Council of City Schools-Coronado, California
- Contra Costa Leads: Presenter on Educational Trends and their impact on Contra Costa County
- *AVID School wide: Intervening for at-risk youth, co-presented with Chicago Unified*
- *district.*
- Presenter at the National Center for School Transformation (NCUST)
- Evaluator/researcher for Best Practices in High Schools for NCUST
- Representative on the California Interscholastic Federation Advisory

PROFESSIONAL MEMBERSHIPS

- California Collaborative for Educational Excellence: Board Member
- East Bay Leadership Association: Director
- Diablo Managers' Association
- National Center for Urban School Transformation Visiting team member
- Stanford University's Secondary Reform Network
- Association of California School Administrators

COMMUNITY ACTIVITIES

- Bike Concord
- Blue Ribbon Regional Task Force
- District Wide City Council Visiting presenter
- PTSA Member
- MDUSD Education Foundation Board Member, Ex Officio

ROBERT BRAVO

135 Rose • Campbell, CA 95008 • (925) 324-9355 •

**Summary of
Qualifications**

- Thirty years of educational leadership experience at the school site and district office levels.
- Skilled in leading teams focused on accelerating student achievement and closing the opportunity gap.

**Professional
Experience****2016 Campbell Union High School District
Superintendent of Schools**

- Guiding a system of six high schools and an adult education program towards the goal of moving from eighth to top three of Santa Clara County districts in terms of college and career

**2015 Dallas Independent School Dallas,
Chief of School Leadership TX**

- Led the School Leadership department in the selection, supervision and evaluation of the 227 K-12 principals in Dallas public schools.
- Oversaw professional development for site administrators, principal supervisors, and

**2008 L.A. Unified School Los Angeles,
Instructional Area Superintendent of ESC South**

- Led a team serving 119,000+ students in 154 K-12 schools in Los Angeles from South Los Angeles to the Port of LA as well in the cities of Bell, Carson, Cudahy, Gardena, Huntington Park, Lomita, Maywood and South Gate.
- Oversaw transition to Common Core State Standards by 6800+ teachers.
 - ◁ ESC South high schools' cohort graduation rates improved from 65% in 2011-12 to 85% in 2014-15.
 - ◁ The number of AP course enrollments increased 32% from 5,995 in 2013-14 to 7,934 in 2014-15.
 - ◁ The percentage of students with 96% attendance and above increased 5.1% from 66% in 2011-12 to 71.1% in

Senior Coordinator, Charter Schools Division, 2010-2012

- Led a team of Specialists and Advisors in the oversight of over 60 independent charter schools including those operated by Green Dot, Aspire, KIPP, and Magnolia Schools.

ITEM 3

California Searches Conducted by Hazard, Young, Attea & Associates

School District	Position
Acalanes Union HSD	Superintendent
Alvord USD	Superintendent
Anaheim Elementary SD	Superintendent
Antioch SD	Superintendent
Baldwin Park USD	Superintendent
Bassett USD	Deputy Superintendent
Belmont-Redwood Shores SD	Superintendent
Beverly Hills Schools	Chief Human Resources Officer
Beverly Hills Schools	Executive Director - Special Education
Beverly Hills Schools	Superintendent
Bonny Doon Elementary SD	Superintendent
Brisbane SD	Superintendent
Bullis Charter School	Principal/Executive Director
*Burlingame ESD	Superintendent
Campbell Union HSD	Superintendent
Capistrano USD	Superintendent
Carlsbad USD	Superintendent
Castro Valley USD	Superintendent
Centinela Valley UHSD	Superintendent
Coachella Valley USD	Superintendent
Compton USD	Superintendent
Coronado USD	Superintendent
*Cupertino USD	Superintendent
Downey Unified Schools	Superintendent
Dublin Unified School District	Superintendent
East Side Union HSD	Superintendent
*El Rancho Unified SD	Superintendent
Eureka SD (Granite Bay)	Superintendent
Fremont Union High School District	Superintendent
Fremont Unified School District	Superintendent
Fresno USD	Superintendent
Galt HSD	Superintendent
Gilroy USD	Superintendent
Gilroy USD	Asst. Superintendent - HR
Gilroy USD	Asst. Superintendent - Ed Services
Gravenstein Union SD	Superintendent/Principal
Hillsborough City School District	Superintendent
Hollister School District	Superintendent
Jefferson UHSD	Superintendent
*Lafayette SD	Superintendent
Laguna Beach USD	Superintendent
La Mesa Spring Valley SD	Asst. Superintendent - Business Services
*Las Lomas ESD	Superintendent
Leadership Public Schools	Chief Executive Officer
Leadership Public Schools	Chief Academic Officer
Live Oak SD	Superintendent
Loma Prieta Joint Union SD	Superintendent
Loomis USD	Superintendent

ITEM 3

California Searches Conducted by Hazard, Young, Attea & Associates

School District	Position
Los Altos SD	Superintendent
Los Angeles County High School for the Arts	Principal
Los Angeles County Office of Education	Asst. Superintendent - HR
Los Angeles County Office of Education	Deputy Superintendent
Los Angeles County Office of Education	Asst. Superintendent - HR
*Los Angeles Unified SD	Superintendent, Deputy Superintendent - Instruction
Los Gatos Union Elementary SD	Superintendent
Los Gatos -Saratoga Union HSD	Superintendent
Manhattan Beach USD	Superintendent
Mill Valley Schools	Superintendent
Montecito Union SD	Superintendent
Mountain View SD	Superintendent
Mountain View-Los Altos High School District	Superintendent
*Oakland USD	Deputy Chief, Facilities – Facilities Planning and Management
Oceanside Unified SD	Superintendent
Ocean View SD	Superintendent
Orinda Union SD	Superintendent
Pajaro Valley USD	Deputy Superintendent
*Palo Alto USD	Superintendent
Piedmont USD	Superintendent
*Pleasanton USD	Superintendent
Portola Valley SD	Superintendent, High School Principal, Director of Assessment
Ravenswood City School District	Superintendent
Redwood City Schools	Superintendent
Reed SD	Superintendent
Rescue Union SD	Superintendent
Riverside USD	Superintendent
*Ross SD	Superintendent
*Ross Valley SD	Superintendent
Rowland USD	Superintendent
Saddleback Valley USD	Superintendent
Salinas City Elementary School District	Superintendent
San Bruno Park School District	Superintendent
*San Carlos SD	Interim Superintendent, Superintendent
*San Diego City SD	Superintendent
*San Diego County Office of Education	Superintendent
San Dieguito UHSD	Superintendent
San Francisco USD	Superintendent
San Leandro USD	Superintendent
San Mateo County Office of Education	Asst. Superintendent - Special Ed
San Mateo Union High School District	Superintendent
San Mateo-Foster City School District	Superintendent
*Santa Ana Unified SD	Superintendent
*Santa Barbara SD	Superintendent
*Santa Clara County Office of Education	Chief Academic Officer, Chief Business Officer, Director of Special Education

ITEM 3

California Searches Conducted by Hazard, Young, Attea & Associates

School District	Position
Santa Monica - Malibu USD	Superintendent
Saratoga ESD	Superintendent
Saugus Union SD	Superintendent
Sausalito Marin City SD	Superintendent
*Sequoia Union HSD	Superintendent, High School Principal
Solana Beach SD	Superintendent
Sonoma Valley USD	High School Principal
Soquel Union ESD	Superintendent
South San Francisco USD	Superintendent
Southwestern Community College	President
Stockton USD	Superintendent
Sweetwater Union HSD	Superintendent
Tamalpais UHSD	Asst. Superintendents - Ed Services
Tamalpais UHSD	Asst. Superintendents - HR
Tamalpais UHSD	Superintendent
Tustin USD	Superintendent
*Union Elementary School District	Superintendent
Vallejo City Schools	Superintendent
Vista USD	Superintendent
*Walnut Creek ESD	Superintendent
West Contra Costa USD	Superintendent
Woodside Elementary SD	Superintendent

** Denotes district in which we have conducted multiple searches*

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA Associates at 408 843-6434 or 831 295-0982 or at hya@ecragroup.com with questions or requests for additional information.



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

San Dieguito Union High School District	Turnkey Strategic Relations, LLC
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

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

Services Provided:

- Global Organizational Development

Mental Health Cooperative

Pam Womack - CEO

615-726-3340

Nashville, TN

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

Services Provided:

- Organizational Development
- Board Consultation



Addendum Three – sampling of who we have served.

