



RBL Enterprises LTD

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November 14, 2008

Dr. Roberta Mayor,
Interim Superintendent
Oakland Unified School District
1025 2nd Avenue
Oakland, CA 94606

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O U S D

Dear Dr. Mayor;

Thank you very much for transmitting the Request for Proposal. We are very pleased to submit our proposal to conduct the search for the superintendent of schools.

Attached please find our proposal. Should you have any questions or concerns, do not hesitate to contact us.

You have our best wishes as you undertake this important process. Indeed, selecting the superintendent is one of the most important decisions the Board of Education will make.

Sincerely Yours

Ruth B. Love
President

RBL ENTERPRISES

Executive Search Consultants

**Proposal
For
Executive Search Services**

SUPERINTENDENT OF SCHOOLS

for

BOARD OF EDUCATION

Oakland Unified School District

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TABLE OF CONTENTS

Introduction	1
Background	1
Scope of Work	2
Approach to the Search	
Work Plan	3
Proposed Process, Deliverables and Timeline	
Search for Qualified Candidates	4
Candidate Evaluation	5
Interviews and Site Visits	6
Negotiation	6
Closure	6
Qualifications	7
References	7
Timeline	8
Professional Fees and Expenses	8
Search Team (short bios)	9

SUPERINTENDENT SEARCH

INTRODUCTION

One of the most important decisions the Board of Education will make is that of selecting a superintendent of schools (CEO). The Chief Executive is charged with implementing Board policies and leading the school district, is responsible for progress within the district and the community.

RBL ENTERPRISES believes that the most successful search evaluates what a candidate has done and how he/she has done those critical tasks. This experience and style are important criteria to evaluate in the choice of a search firm as well. This proposal outlines our methods and characteristics. Our company has developed effective and efficient approaches that assure the School Board of high quality candidates. Our approach, while carefully defined, is flexible and can be adapted to meet the needs and priorities of the Oakland Unified School District Board of Education. The qualifications and experience of our firm is such that we focus primarily on urban school districts. It is our belief that cities can solve the challenges facing schools and the Board can select an educational leader with the intellect, skill set, commitment and energy to lead reform efforts necessary to not only close the achievement, but to elevate the school district to its highest level.

BACKGROUND

THE OAKLAND UNIFIED SCHOOL is characterized by its diversity.. The district's 100 schools serve nearly 46,000 K-12 students, thousands of adult students and some 6,000 employees. The district's budget is \$250, 959,000.

The Board, citizens and staff are committed to educational excellence and will require a superintendent who can build on the many fine efforts currently in existence within the district and community. The district leader may need to institute some additional reforms, if necessary.

Oakland Public Schools' Board of Education has a mission that speaks to its goals for all students. It is a commendable goal; "The mission is to EXPECT SUCCESS and to provide a safe learning environment, where all

students acquire the skills and knowledge necessary for success in a global community where cultural differences are honored.

Organizationally, the Oakland Unified School District has a State Administrator, an elected school board, an Interim Superintendent, all with discreet duties and responsibilities. This district's strategy team implements and monitors plans in support of improving educational opportunities for all students. Further, the School district is divided into School Networks designed to facilitate education improvement in elementary, middle, high schools and charter schools. The principals and teachers are responsible for education at school and in the classrooms.

The district has made academic progress and continues to strive for excellence for all students.

SCOPE OF WORK

APPROACH TO THE SEARCH

RBL Enterprises offers a valuable process in developing an open, relationship with the Board, designated staff and a knowledge of the community. Our team is experienced and is nationally recognized as educational leaders. Consistently adhering to the criteria from the board and community, we will develop a position profile and will present an array of strong, qualified individuals who also match the values and style of your organization (district). Concurrently, we will work with the school board, interim superintendent, human resources department and other designated individuals or groups.

During the search we will:

- Facilitate a session to establish *consensus* on the complete hiring criteria and position profile or job description
- Place advertisements in Education Week, selected newspapers, periodicals and place vacancy notice on our website
- Conduct a comprehensive community engagement process as well as obtain input from the district staff.
- Conduct a professional, confidential and thorough search of qualified candidates in the field. This includes actively seeking out potentially qualified candidates (that may or may not be looking) as well as evaluating the candidates' match for the position.
- Consistently assess both internal (if applicable) and external candidates (nationally). The process includes evaluation of candidates' written responses to criteria related questions, telephone interviews and face-to-face interviews prior to submitting them to the Board of Education.

- Prepare a review of qualifications on the top candidates and retain an outside agency to conduct criminal and credit verifications. Our company will conduct educational verifications. We will recommend a slate of candidates to interview as Semi Finalists. Once the Board has reduced the Semi Finalists to two or three Finalists, we will schedule another round of interviews.
- Prepare suggested questions and a process to be discussed and used during in interviews
- Advise the OUSD in developing the complete compensation package, including salary, benefits and relocation expenses.
- Develop, in consultation with OUSD, a plan to transition into the position of superintendent.
- Facilitate a session to determine the new superintendent's (CEO) Initial objectives and recommend a process for Board evaluation of the executive, if desired.

WORK PLAN

Our objective is to find the best-qualified candidates for the position, based upon the school board's priorities and preferences:

- Key Board Priorities
- Experience of Candidates
- Professional and Personal Characteristics
- Track record of success in prior positions
- A solid philosophy that believes all students can learn
- Has an accountability system for all employees
- Other Related Factors

RBL Enterprises uses a defined process that describes the tasks and responsibilities of the Search Team. These phases are:

PROPOSED PROCESS	DELIVERABLES	TIMELINE
I. Recruitment Profile & Recruitment Package		
Meet with Board as a group and individually to determine priority criteria for the new executive	List of Priority Criteria	week 1
Sponsor a series of community hearings & Hold focus groups for corporate/business leaders, (qualities of supt.)	Summary recommendation	week 2
Contact district organization leaders and	Summary	week 1

distribute surveys to members (qualities of supt. from credentialed and classified)	suggestions	
Draft position description (vacancy announcement) using Board priorities and input from community and staff.	Position Description	week 2
Submit job description to board for approval		week 2
Develop with Board a salary range based On comparable salaries and districts		week 2
Establish optimum schedule and timeline		
Prepare Recruitment Package (with district staff, develop brochure , vacancy posting)	brochure	week 3
Identify target audiences, individuals, nominators and organizations/agencies		week 3

II. Disseminate information

Advertise broadly to Education Week, AASA Journal, Executive Educators and selected newspapers	ads	week 3
Place on our website.		Week 3
Contact other Search Firms to notify them of vacancy.		
Mail Recruitment package to "Nominators" who are designated to identify qualified candidates	copies of brochures & vacancy posting	week 3/4
Send information package to Deans of Education, State Education Departments, County Offices, Individuals from List of potentials candidates.		

III. Search for Qualified Candidates

Search out qualified candidates through our network contacts	acknowledge applications	weeks 4-8
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Contact prospective candidates
nominated by sources

Contact individuals who responded to
ads and vacancy announcements

summary of
applications

Contact "passive" candidates in
targeted districts & organizations

Utilize national postings & ads

List of postings
& nominations

IV. Candidate Evaluation

Establish confidential files of applicants

weeks
9-11

Send letters of receipt to all applicants

Conduct thorough credential screening
of each applicant

Obtain written responses to criteria
related questions

Status of background
checks

Conduct multiple telephone interviews

Conduct face-to-face interviews with the most
qualified applicants (at AASA conference)

Retain outside agency to conduct credit
and criminal background checks

Include findings
in summaries

Verify educational background

Conduct reference check on semi finalists

Prepare and submit thorough documentation
on semi-finalists; including resumes, strengths,
weaknesses and results of reference checks

Profiles

V. Interviews and Site Visits

Schedule and coordinate a multi-stage interview process with Board and/or Board liaison	Schedule of week 12 interviews
Prepare suggested questions and a "real Problem" for interviewees	Interview Ranking Form
Facilitate interviews and discussion of applicants	
Facilitate narrowing pool to 2 to 3 finalists	
Schedule second interview, if desired	
Schedule Board visit to home districts	Schedule of week 13 Site visits
Facilitate reporting findings from visits	
Facilitate Board selection of Superintendent	

VI. Negotiation

Assist in developing the offer package of Salary, benefits, relocation, contract Provisions. Work with district legal counsel	Comparable week 14 salary/benefit information
Advise Board on transition, if desired	
Facilitate the offer and assist in preparing press release	
Suggest strategy for introducing new Superintendent to district and community	

VII, Closure

Advise Board on making offer or not making offer	week 14
Facilitate meeting to establish goals and methods	

of evaluation for new superintendent

QUALIFICATIONS

RBL Enterprises was founded by Ruth B. Love in 1986 and is headquartered in Oakland, CA. Consultants on search teams are experienced and highly respected. The firm has specialized in executive recruitment, strategic planning, professional development and coaching for superintendents. Consultants have conducted searches primarily for urban school Boards of Education. In several instances, the company has been selected to conduct searches for two and three times for a given district's Board of Education. RBL Enterprises has developed unique and successful procedures that are key to identifying the most qualified candidates to meet the Board's requirements. Each of its searches attracts significant numbers and quality candidates. This is due to several related factors; a) The network of contacts with state and national organizations, b) Our relationship with respected education leaders who make informed nominations and c) Our ability to persuade the best individuals to apply; and d) Many candidate realize they will receive fair and objective consideration and screening. Lists of highly qualified candidates are in our computerized list of effective leaders. However, each applicant's file is reviewed and ranked. While there are numerous searches in the 14,000 school districts, it is our practice to be selective about those searches for which we compete. Resumes are provided in the appendix.

REFERENCES

Dallas Board of Trustees, 160,000 students
3700 Ross Avenue
Dallas, TX 95204

Mr. Hollis Brashear (214) 376-3484
or Mr. Lew Blackburn (972) 925-3700

Atlanta Board of Education, 49,773 students
130 Trinity Avenue, SW
Atlanta, GA 30303

Mr. Joe Martin (404) 802-3500

Rochester City Board of Trustees, 44,000 students
131 W. Broad Street
Rochester, NY 14614

Mr. Curry
(585) 262-8100

Rialto Unified School District, 30,000 students
182 East Walnut Avenue
Rialto, CA 92376

Mr. Dennis Mobley
(909) 820-7700

Other references are available upon request.

TIME FOR PERFORMANCE

It is anticipated that this search can be completed in four months. Should the Board and Interim Superintendent let the contract in December, the search could begin in January. By the end of May, the search can be completed. Depending upon our joint schedule, the search could be completed in three months.

PROFESSIONAL FEES AND EXPENSES

FEES

The flat fee for this search is discounted to \$45,000 plus expenses. The fee is negotiable. Retainer billing is \$5,000 upon initiation of the search and \$10,000 per month until the assignment is completed. It is anticipated that the services will not require more than the stipulated. In any case, RBL Enterprises will remain until the tasks are completed.

Expenses

Expenses include costs associated with searches and will be billed monthly. They include telephone calls, advertising fees, travel, and hotel (when necessary for recruitment at conference/s). It is suggested that a credit card or mobile phone be made available exclusively for the search consultant. The anticipated travel to the Board of Education and Interim Superintendent's offices would be billed on a mileage basis. Given the fact that our offices are within the same city, there would be minimum travel costs. Additionally, cost to attend the conference of the American Association of School Administrators is held this year in San Francisco. Hence, the cost would include travel and possibly hotel. It provides a solid opportunity to interview prospective candidates. As a member of Central

General, Dr. Love participates in screening potential superintendents for the association.

It is estimated that total expenses will be \$20,000 including advertising, travel telephone calls and travel. These expenses will be invoiced on a monthly basis.

SEARCH TEAM

The Search team is composed of Dr. Ruth B. Love, the Lead consultant; Dr. Jose Lopez, consultant and Ms Norma Gray, Operations.

Dr. Ruth Love has 22 years of experiences in executive searches. She is the founder and President of RBL Enterprises. Her experience in urban education spans some forty (40) years, beginning as a teacher. Dr. Love has worked at all levels of the education spectrum; local, state and federal. As Superintendent of the Oakland Unified School District, she is most proud of the significant improvement in academic achievement; with students reaching the national norms on standardized tests. In the Chicago Public Schools, as General Superintendent, the academic performance of the vast student population of 500,000 students was most rewarding. Dr. Love's network of contacts with professional organizations and individuals is enormously in recruitment. Her years at the university has enabled her to become acquainted with Deans and faculty in urban universities. Currently, in addition to managing her company, she is a professor in a doctorate program (U.C. Berkeley) to prepare urban superintendents.

With regards to searches, Dr. Love focuses on urban district, both large, average and small. It is her belief that the cities and their school districts must have a symbiotic relationship. Urban school districts can provide educational excellence and equity to all students. Hence, the recruitment of highly qualified candidates is challenging and rewarding. It is a task that Dr. Love will assume willingly and passionately.

Dr. Jose Lopez has 38 years of experience in public education. Beginning in the state of Texas, he rose from teacher, principal, district director to superintendent of McAllen Independent School District. Since 1993, he has worked at California State University, East Bay. Currently, he heads the university's doctorate program to prepare urban superintendents. He is conversant with superintendents and prospective superintendents throughout the nation.

Dr. Lopez will assist primarily in sourcing candidates and in participating in the hearing. He will also assist in the important task of screening