

### RFQ Responses for Search and Selection of Superintendent

	<b>Garcia, Hernandez Sawhney</b>	<b>Leadership Associates</b>	<b>McPherson &amp; Jacobson</b>
Firm Location	Oakland, CA	Santa Barbara, CA	Omaha, NE
Fee	\$35,000	Full search: \$42,500 Abbreviated: \$29,500	\$36,900
Expenses	Actual costs of large copy/print jobs, outside translation services, delivery fees, parking, mileage, travel expenses (airfare, lodging, meals and ground transportation) and consultant fees. Costs exceeding \$1000 to be pre-approved by board.	Consultant business expenses not to exceed \$5,000. Candidate travel as approved by the board.	\$14,600 (consultant travel to meet with the board; travel for stakeholder meetings (4 days); \$2000 advertising; resume and interview materials; video interviews of 5 candidates
Total Cost	\$35,000 plus costs	Full search: nte \$47,500 Abbreviated: nte \$34,500	\$51,500
Services responsive to RFQ	<ul style="list-style-type: none"> <li>• Interview Board members</li> <li>• Create timeline and workplan</li> <li>• Develop a job description and application</li> <li>• Work with OUSD HR dept. to advertise the position</li> <li>• Provide Board with options re screening, interviews and selection</li> <li>• Provide relevant market info re superintendent compensation</li> </ul>	<p><b>FULL SEARCH:</b></p> <ul style="list-style-type: none"> <li>• Meet with board re characteristics seeking in new superintendent, strengths and challenges for future, process for engaging groups and individuals in district and community, create timeline, possible contract parameters, and potential internal candidates</li> <li>• Community and staff input and engagement plan; meet with groups and individuals to solicit input re desired qualities; create online survey to encourage broader participation; prepare thorough report with comments from each group, individuals and survey.</li> <li>• Prepare position description and make changes as requested by board</li> </ul>	<p><b>Phase 1</b></p> <ul style="list-style-type: none"> <li>• Using group process, identify most important characteristics of future superintendent</li> <li>• Establish timelines</li> <li>• Determine advertising venues</li> <li>• Identify appropriate stakeholder groups</li> <li>• Assist board in determining compensation parameters</li> <li>• Identify point of contact for district</li> </ul> <p><b>Phase 2</b></p> <ul style="list-style-type: none"> <li>• Work with district to schedule stakeholder input meetings</li> <li>• Meet with stakeholder groups to solicit input</li> <li>• Develop and distribute application and advertising materials</li> <li>• Actively recruit and track applicants</li> </ul> <p><b>Phase 3</b></p> <ul style="list-style-type: none"> <li>• Evaluation and reference checks of applicants</li> </ul>

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		<ul style="list-style-type: none"> <li>• Advertise and actively recruit statewide and nationally, check references</li> <li>• Selection of finalists – meet with board to review and discuss all applicants, recommend candidates for consideration</li> <li>• Final interviews – board conducts interviews but present to help facilitate discussions; various follow up steps and inform all candidates of the outcome</li> <li>• Coordinate visit to finalist’s district (board determines who goes on the visit); work with board and finalist on final parameters of a contract</li> <li>• Assist board and staff with communication plan and other activities to support the approval of the new superintendent</li> </ul> <p>ABBREVIATED SEARCH:</p> <ul style="list-style-type: none"> <li>• Assist board in updating the profile from previous search and then recruit 3-5 internal and/or external candidates who meet that profile. Candidates will be presented to the board to determine whether to proceed with interviews. LA would support the interview process, which may include a stakeholder panel that could meet with the finalists and the board in closed session. Board to reconvene to make the final decision.</li> </ul>	<ul style="list-style-type: none"> <li>• Pre-interview and video of shortlist applicants</li> <li>• Selection of applicants to be interviewed</li> <li>• Develop interview questions</li> </ul> <p>Phase 4</p> <ul style="list-style-type: none"> <li>• Interview candidates</li> <li>• Candidates meet with stakeholders</li> <li>• Selection of new superintendent</li> </ul> <p>Phase 5</p> <ul style="list-style-type: none"> <li>• Establish superintendent performance objectives</li> <li>• Evaluation of superintendent</li> <li>• Guarantee</li> </ul>
Familiarity with OUSD	Outside counsel	Placed prior superintendent	None

	<b>Garcia, Hernandez Sawhney</b>	<b>Leadership Associates</b>	<b>McPherson &amp; Jacobson</b>
Experience level of provider	Founded in 2006 and have advised school districts and agencies on how to proceed with hiring	Founded in 1996. Specializes in helping CA school boards find new superintendents. Over 350 searches in CA.	Founded in 1991 and have placed over 650 superintendents
Reflective of Oakland/ Diverse	Majority woman-owned and 100% minority-owned law firm	Partners are all former superintendents with successful leadership experiences; a number are bi-lingual in Spanish	Almost one-fourth of McPherson & Jacobson consultants are minorities or female. Over fifty % have a doctorate degree.
References	<p>Foothill College (<i>Statewide EEO &amp; Diversity Summits</i>)</p> <p>Gilroy USD Board of Education (<i>Assist BOE w/strategic planning, negotiations, superintendent contracts, cabinet level recruitment, searches, background checks and hiring issues</i>)</p> <p>Oxnard Elementary School District's BOE (<i>Assist BOE as General Counsel with a variety of superintendent searches and contracts</i>)</p>	<p>Similar project experience:</p> <p>San Jose USD</p> <p>West Contra Costa USD</p> <p>Pittsburg USD</p> <p>Riverside USD</p> <p>Corona-Norco USD</p>	<p>Glendale USD</p> <p>Elk Grove USD</p> <p>Charlotte-Mecklenburg Schools (Charlotte, NC)</p> <p>Wake County Public School System (Cary, NC)</p>

PROPOSAL SUBMITTED

BY

**GARCIA HERNÁNDEZ SAWHNEY, LLP**

IN RESPONSE TO

**OAKLAND UNIFIED SCHOOL DISTRICT**

REQUEST FOR QUALIFICATIONS – RFQ

SUPERINTENDENT SEARCH SERVICES

December 12, 2016

On behalf of Garcia Hernández Sawhney, LLP (GHS), we are pleased to submit a proposal to provide Superintendent Search Services to the Board of Education of the Oakland Unified School District (District).

## **B. Organizational Experience**

### ***1. Similar Project Experience***

#### ***Experts on Diversity in Hiring***

When we founded our firm in 2006, we set the vision for what our firm should be that remains as our vision statement, and our reality, today: Premier legal professionals, strengthened by diversity and passionately committed to making a meaningful difference in our clients' businesses, communities and lives. We are the most diverse law firm serving school districts and have firsthand experience in building and hiring outstanding diverse staff at all levels. Before training others in diversity in hiring, we did it ourselves. GHS is a majority woman-owned and **100%** minority-owned law firm. Our firm's legal professionals reflect the full diversity of California with approximately 14% African American, 21% Asian American, 29% Latino and 36% White attorneys. The majority of our attorneys are women. **Every** attorney in the Firm graduated from a top tier law school and half of our attorneys have a degree from Harvard University.

Since GHS opened its doors in August 2006, our attorneys have advised clients on Equal Employment Opportunities laws and affirmative action/diversity goals in a post Prop 209 environment. Following a groundbreaking workshop in 2013 at a Community College League of California conference featuring Mary Hernandez and Nitasha Sawhney, along with current and former Community College Presidents and Trustees ("Coloring Inside the Lines: What are the Rules around Building and Maintaining Diversity (Really)?"), our firm has also been frequently called upon to provide counsel and assistance to institutions of higher education as a recognized expert on Equal Employment Opportunity laws and ways to promote diversity in hiring. In 2015, GHS Equity Partner, Nitasha Sawhney, was a key participant in EEO/Faculty Diversity Summit trainings that were provided throughout California on behalf of the Office of General Counsel, California Community Colleges Chancellor's Office.

#### ***Experts on Facilitating Strategic Governance Issues and Negotiations with Boards***

Our firm specializes in providing outside General Counsel services to school districts, community college districts, other public agencies and nonprofits. In districts where we serve as General Counsel, we have acted as facilitators on key policy and governance issues, frequently including issues relating to strategic planning and issues relating to recruiting, hiring, negotiating contracts with, evaluating and/or releasing superintendents. In some cases, where a district's board has chosen not to hire a search firm for a cabinet level position, they have relied on us as General Counsel to advise them on how to proceed and to assist in the search to bring the best candidates possible to them. Whether it is collective bargaining or negotiating a superintendent's contract, it is a common practice for our lawyers who act as General Counsel to meet with individual Board

members and then facilitate a united approach to the development of bargaining or policy positions in advance of commencing negotiations or other policy work. We work with our Boards to analyze and anticipate community goals and concerns, help them develop communications plans and networking strategies and also have facilitated outreach to community groups to gather input and build consensus. We have provided trainings on equity, diversity and equal opportunity issues to Board members, staff and stakeholder groups in order to (1) show that commitment to equity, diversity and equal opportunity is the moral high ground, (2) show that these principles are inclusive of everyone, (3) provide a linguistic framework for discussion of the issue that fosters commitment to the principles; and (4) provide the Board with an opportunity to invite community and stakeholders to join the Board in accomplishing the mission of the District.

### ***Extensive Statewide Networks***

Our attorneys are distinguished leaders in their various communities. A partial listing of the organizations that our attorneys work or volunteer with include:

Advancement Project  
Asian Americans Advancing Justice  
Asian Pacific Islander Trustees and Administrators  
California Association for Bilingual Education  
California Latino Community College Trustees and Administrators  
California Latino School Boards Association  
California State Bar Foundation  
Californians Together  
Chinese American Citizens Alliance  
For People of Color, Inc.  
Hispanic National Bar Association, Commission on Status of Latinas in the Legal Profession  
Latino Business Action Network  
League of California Cities, Latino Caucus  
NAACP, Oakland Chapter  
OCA – Greater Los Angeles  
Sikh Coalition  
Sikh American Legal Defense and Education Fund  
South Asian Americans Leading Together

An example of our firm's networking in action is the statewide Latino Policy Summits held in 2014 and 2015 organized by GHS Equity Partner Bonny Garcia and hosted by Marymount California University, where he served as a Board member. More than 50 participants, including Latino elected officials, chief executive officers and administrators from cities, school and colleges throughout the State, convened to make joint decisions on Latino policy issues. The organizations participating, including the California Association of Latino Community College Trustees & Administrators, the California Latino School Boards Association, the League of California Cities

Latino Caucus, the California Association of Latino Superintendents and Administrators and the Western Association of School Administrators, collectively represent the overwhelming majority of Latino local elected officials and administrators in California. At both Summits, the Chair of the Latino Legislative Caucus participated as a Key Note speaker so that the local officials represented could have the opportunity to learn about and influence state policy issues as well.

## **2. Key Team Members**

Given the diversity of our firm's attorneys, we plan to involve most of them, as needed, particularly our Equity Partners and our Alameda Office staff. All attorney profiles are available at [www.ghs.com](http://www.ghs.com) but the backgrounds of those we expect to be most involved are summarized below. We will also engage our paralegals from time to time and our media consultant, David Garcia, to assist with communications strategies.

### ***Bonifacio Bonny Garcia***

Bonifacio Bonny Garcia is the managing partner and a founder of Garcia Hernández Sawhney, LLP. He is a graduate of Harvard Law School and has been awarded Martindale and Hubbell's highest "AV" rating for Ethics and Competence. Garcia currently serves as General Counsel to the Palmdale Unified School District, Special Collective Bargaining Negotiations Counsel for the Pasadena and Santa Ana Unified School Districts, legal counsel to the Rio Hondo and Ventura Community College Districts and City Attorney for the City of Delano. He was named Top Governmental Lawyer by the *San Diego Transcript* in 2010 and awarded Top Lawyer 2013 in Labor and Employment status by *American Lawyer Magazine*, *Corporate Counsel Magazine* and the *National Law Journal*. He serves on the Board of Trustees of Marymount California University, Catholic Charities of Los Angeles, Inc. and the Advancement Project.

### ***Mary T. Hernández***

Mary T. Hernández is a founding partner of Garcia Hernández Sawhney, LLP. She is a graduate of Stanford Law School with an undergraduate degree, *magna cum laude*, from Harvard University. Mary serves as General Counsel to the Gilroy Unified School District, the Fairview Fire Protection District, the California Association for Bilingual Education, the Latino Business Action Network, and the Society of Hispanic Professional Engineers, and special counsel to the Alameda County Office of Education, the Santa Clara County Office of Education, the Hayward Unified School District, the San Francisco Unified School District, and the San Leandro Unified School District, among others. Mary is a Past President of the Hispanic National Bar Association and the San Francisco Board of Education and currently serves on the Board of the California Bar Foundation and the HNBA's Commission on the Status of Latinas in the Legal Profession. As President of the SFUSD Board of Education in 2000, Mary led the superintendent search process on behalf of the Board which resulted in Dr. Arlene Ackerman getting the post that year.

### ***Nitasha Kaur Sawhney***

Nitasha Kaur Sawhney is an equity partner of Garcia Hernández Sawhney, LLP. She is a graduate of the U.C. Davis Law School with an undergraduate degree from U.C. Berkeley.

Sawhney currently serves as the Acting General Counsel at the Peralta Community College District and General Counsel to the John Swett Unified School District, the Hueneme Unified School District and the Oxnard School District and as special legal counsel to several other educational institutions throughout California. Nitasha frequently provides counsel on matters involving hate crimes, civic engagement, and employment discrimination. She is a past Chair of the California Commission on Asian Pacific Islander Affairs, serves on the Board of South Asian Americans Leading Together (SAALT), the legal advisory council of the Sikh Coalition and was featured as an expert in the award-winning documentary *Divided We Fall: Americans in the Aftermath* regarding hate crimes in the Sikh Community.

### ***Danielle Charles***

Danielle Charles is an associate of Garcia Hernández Sawhney, LLP. She is a graduate of Harvard Law School with an undergraduate degree from Columbia University. Danielle is an active member of the NAACP, Oakland Chapter. She is a member of the Firm's education and public law groups.

### ***Lawrence Joe***

Lawrence S. Joe is an associate of Garcia Hernández Sawhney, LLP. He is a graduate of UCLA's School of Law and the School of Public Affairs. He received his Bachelor of Arts from U.C. Berkeley and a Master of Arts from Harvard University's Graduate School of Education. Joe works with a variety of the firm's school district and public entity clients. Joe served as Co-Chair of the 2014 Organization for Chinese Americans (OCA) National Convention in Los Angeles, which hosted more than 600 Asian Pacific American leaders from throughout the United States. Lawrence provides support in all areas of practice for our school district clients.

### ***Thomas Smith***

Thomas Smith is an associate of Garcia Hernández Sawhney, LLP. Smith is a graduate of Harvard School of Law with an undergraduate degree from Seton Hall University, where he graduated with high distinction. He is an active member of the NAACP's Oakland Chapter. He is a member of the Firm's education and public law groups. He is a member of the Massachusetts Bar and is a candidate for admission to the California Bar.

### ***Leah Smith***

Leah M. Smith is an Associate of Garcia Hernández Sawhney, LLP. Smith is a cum laude graduate of William & Mary School of Law with an undergraduate degree from U.C. Berkeley, where she graduated with high distinction. She is a member of the Firm's education and public law groups.

### ***David Garcia***

Dave Garcia is the Senior Director of his Multi-Platform Media Management Group and is on retainer with our firm as a media/communications consultant. He brings more than 40 years' experience in electronic and print media, including having anchored or reported in top 100



markets across the U.S. and Mexico. Dave was a member of the 1985 Pulitzer Prize winning team for his coverage of the Los Angeles Olympics and has been featured in the Discovery Channel and on CNN. As the Managing Editor of network affiliates in Texas, he has mentored and guided many present anchors and reporters in the U.S. He has been a part of transition teams in Washington D.C. as well as New Mexico and Texas state capitals. At home, Dave serves as a member of a parochial school board and as a deacon of his church.

3. References. The references below can speak to our experience with diversity in hiring, with strategic planning and governance work with school boards, and with respect to our ability to bring diverse statewide networks together when needed.

- Thuy Nguyen, President, Foothill College; Former General Counsel, California Community Colleges Chancellor's Office  
*Project: Statewide EEO & Diversity Summits*  
Current Contact Information:  
Foothill College  
12345 El Monte Road  
Los Altos Hills, CA 94022  
nguyenthuy@fhda.edu  
Tel: 650.949.7200
- Fred Tovar, Outgoing President, Gilroy Unified School District Board of Education  
*Project: Assistance to the Board of Education with strategic planning, negotiations, superintendent contracts, cabinet level recruitment, searches, background checks and hiring issues*  
Contact Information  
Stanford School of Medicine,  
Primary Care Associate Program,  
Director of Student Affairs,  
Assistant Director of Admissions  
Email: ftovar@stanford.edu  
Tel: 650-725-5342  
Cell: 408-750-7029
- Veronica Robles-Solis, Past President, Oxnard Elementary School District's Board of Education  
*Projects: Assistance to the Board of Education as General Counsel with a variety of superintendent searches and contracts*  
Contact Information  
Oxnard School District  
1051 South A Street  
Oxnard, CA 93030  
Tel: 805-385-1501  
Email: vero\_r@yahoo.com

- Dr. Barbara Flores, President, California Latino School Boards Association; Board Member, San Bernardino City Unified School District; Board Member, CABA  
*Project: Statewide Latino Policy Summit and Statewide Networking*  
Contact Information  
769 Sonora St.  
San Bernardino, CA 92404  
Email: barbaraflor25@yahoo.com  
Cell: 909-223-2356
- Dr. Francisco Rodriguez, Chancellor, Los Angeles Community College District; President, California Latino Community College Trustees and Administrators  
*Project: "Coloring Inside the Lines" and other diversity training workshops and statewide networking*  
Los Angeles Community College District  
770 Wilshire Boulevard  
Los Angeles, CA 90017  
Tel: 213-891-2000  
Email: RodrigFC@email.laccd.edu

### C. Project Approach and Work Plan

A traditional search firm often expends significant time calling and coaxing particular individual candidates to apply. Because Oakland Unified School District (District) is a large school district located in one of California's most prominent cities, the State is already abuzz with discourse regarding the vacant Superintendent position and qualified candidates are already waiting for the opportunity to apply. We are not a search firm but do believe that we can provide effective services to the Board of Education in this superintendent search process. Our approach would be to work with the Board to ensure that the Board feels empowered and in charge of the entire process; to ensure the broadest applicant pool possible by disseminating information that makes the Board's priorities and desired qualifications abundantly clear; and to help ensure that the District's stakeholders feel included and confident about the process. We believe our firm has the requisite experience working directly with and empowering school boards to facilitate the hiring of a highly-qualified candidate who has a proven track record working with a diverse demographic of students and families in an urban setting.

Our initial step would be to interview all Board members and meet with the OUSD's General Counsel's office. The timeline and detailed workplan would be developed immediately after these meetings and would then be discussed with and approved by the Board. We anticipate developing a job description and application based on interviews with Board members, meetings with stakeholders as agreed upon and as discussed with and directed by the Board as a whole. We expect to work with the District's human resource department to advertise the position including on EdJoin, the District's website, and with the many California organizations that work with school administrators that exist (e.g., AAPA, ACSA, ALAS, CAASA, CABA, CALSA, etc.) as well as

the other postings that the District's human resources department normally uses for recruiting and/or that we feel have connections to individuals that would meet the qualifications set by the Board. We will provide the Board with options regarding screening, interviewing and ultimately selecting the final candidates and proceed in accordance with the Board's desired approach. We will lead the process on background checks, again with the level of detail as directed by the Board (with options provided) to give the Board the necessary confidence regarding their finalists. We will gather and provide the Board with relevant market information regarding superintendent compensation, a legal analysis of key terms and conditions subject to negotiation for the superintendent's employment contract and facilitate the negotiation process as needed. We anticipate having a timeline that would permit a July 1, 2017 start date, unless the Board directs otherwise.

#### D. Cost and Time

Our goal would be to include as many members of our statewide team of legal professionals as would be helpful and we are therefore proposing a flat fee so that our team can put in as much effort as needed without worrying about running up costs. Depending on the Board's direction on Board and community meetings, the amount of time devoted to this project would minimally be between 150 and 200 hours over the next six months. We propose a flat fee of \$35,000, plus costs (discussed below) payable \$5,000 per month for the first five months and \$10,000 in the sixth month. Post hiring consultations requested by the Board that might occur in the seventh or eighth month, including participation in a retreat with the newly hired Superintendent in order to development mutually agreeable communications and governance protocols to foster effective communications and a successful, long-term relationship, would be provided at no extra charge.

GHS will absorb incidental charges such as minor in-house copy jobs, facsimile and minor postage charges. Other incidentals, such as large copy or print jobs, outside translation services, messenger and other delivery fees, parking, mileage at the IRS rate, travel expenses, if any (including airfare at the least expensive rates, lodging, meals, and ground transportation), and consultants' fees would be billed to the District on a monthly basis at cost. Our firm does not mark-up any of these incidental expenses. Access to the firm's media/communications consultant would be provided at no cost to the Board. We will not make use of any other outside consultants at the District's cost, or incur any costs exceeding \$1000, unless approved by the Board in advance. GHS would, of course, itemize all costs incurred and provide back-up documentation upon request.

We greatly appreciate the opportunity to submit this Proposal. Should you desire any additional information, feel free to contact me at (510) 695-2802 or on my cell at 415-722-4152.

Respectfully Submitted,

*Mary T. Hernández*

Mary T. Hernández, Equity Partner  
Garcia Hernández Sawhney, LLP



PROPOSAL TO CONDUCT A SUPERINTENDENT SEARCH  
FOR



OAKLAND UNIFIED  
SCHOOL DISTRICT

*Community Schools, Thriving Students*

DECEMBER, 2016



## COVER SHEET

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- Leadership Associates is applying as a Firm.
- Leadership Associates is not currently an OUSD contractor.
- Leadership Associates has served as an OUSD contractor in past years.

Scope of Work: *Superintendent Search, 2014*  
*Executive Search for General Counsel*



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December 12, 2016

Board of Education  
Oakland Unified School District  
c/o Marion McWilliams  
Legal Counsel, Legal Department  
1000 Broadway, Suite 680  
Oakland, CA 94607

Dear Members of the Board:

Leadership Associates is pleased to submit a proposal to partner with the Oakland Unified School District Board of Education to select a new superintendent. We are submitting this proposal in response to the RFQ sent to us by the District on December 8, 2016.

This unique proposal presents different search options to the Board for consideration: Option One provides a full search; Option Two provides an abbreviated version of a full search at a lower cost; and Option Three concerns our interest in supporting the Board in a search for an interim superintendent, should that be deemed helpful by the Board. A brief summary of each of these is as follows:

Option One: Leadership Associates will conduct a full search including meetings with staff, community, and students to gain input for the profile. Leadership Associates will then recruit candidates who meet the profile. These candidates will be presented to the Board and the Board will determine whether to proceed with interviews. Leadership Associates will provide support with the interview process, which could include a stakeholder panel that would meet with the finalists and the Board in Closed Session. The Board will then reconvene and make the final decision. Cost: \$42,500

Option Two: Leadership Associates will assist the Board in updating the profile from the previous search and then recruit 3-5 internal and/or external candidates who meet that profile. These candidates will be presented to the Board and the Board will determine whether to proceed with interviews. Leadership Associates will provide support with the interview process, which could include a stakeholder panel that would meet with the finalists and the Board in Closed Session. The Board will then reconvene and make the final decision. Cost: \$29,500

Option Three: Leadership Associates will help the Board find an Interim Superintendent who could serve for a six to twelve-month period. The Board would then make a decision to stay with the Interim Superintendent or proceed with a search. Cost: \$15,000

By way of background, our firm has worked with a wide variety of school districts throughout

California since our founding in 1996. We have completed more than 350 searches for California school boards since that time. More than 85% of the superintendents selected have remained in their positions more than five years. Our work includes partnering with Boards in several similar districts in terms of geography, size, and/or demographics. These include but are not limited to the Sacramento City, Oakland, San Jose, Pittsburg, and West Contra Costa unified school districts and the Los Angeles County Office of Education. We have also done Executive Director searches for statewide organizations including the Association of California School Administrators (ACSA) and the California Collaborative for Educational Excellence (CCEE). Please note that both the San Jose Unified and West Contra Costa Unified searches were completed in the last 18 months and that both are urban PreK-12 districts.

We are a California-based executive search firm that is mission-driven and values-based. We are committed to helping Boards find strong educational leaders who share our belief that superintendents must always keep students first, share the district's values and beliefs, work diligently with integrity to address issues related to equity and excellence, and keep everyone focused on the power of high quality teaching and learning.

To this end we recruit candidates who are the right match for the District we are serving. Even though we may work with more than one district at any given point in time, we treat each district as unique and deserving of the best candidates. While there are similarities among districts, we believe that each district has a unique culture that is important to respect and understand. There are many good superintendent candidates but only some will be the right match for Oakland Unified School District. Our job is to find those individuals who are that right match. It is also important for you to know we are currently partnering with these districts to select their next superintendent: San Francisco Unified, La Habra City, Carmel Unified, and San Dieguito Union High School Districts. We are prepared to discuss this in greater depth with the Oakland Board particularly with regard to the San Francisco search.

We recruit nationwide and have a deep understanding of the ever-changing California educational landscape and the leaders who will best thrive in that environment. Through the continued participation of several of our partners in education organizations such as the California Collaborative for District Reform, we have remained current on key education policy and system wide developments including Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation.

In considering the uniqueness of the Oakland Unified School District, Leadership Associates is very aware and respectful of the strengths of Oakland and will bring you candidates who will build on those strengths and address the challenges that lie ahead. We recognize the need to hire a new superintendent who will build on the good work that has already been accomplished. As an example, Oakland's Pathway to Excellence provides a clear roadmap for the future. The district's work on Social Emotional Learning and Equity is providing students with the social and emotional behaviors required for success in the classroom. The Equity work including the specific support provided to African American males is helping close the achievement gap. The District's core values and your three core priorities help define and shape a culture that motivates everyone to do their best work and improve achievement across the board.



We believe that our familiarity and knowledge of Oakland Unified will be a major asset throughout the search process. We partnered with the Board in the selection of Superintendent Wilson. We also assisted the District in the selection of its General Counsel. Just this last week Leadership Associates partners Kent Bechler and Jim Brown interacted with members of your leadership and instructional teams while attending the California Collaborative for District Reform meeting, which focused on Oakland's Equity and Social Emotional Learning.

We would welcome the opportunity to partner with you to discuss the different search process options including others we may not have identified. We can also discuss options for staff and community input, an overview of the potential candidate pool, timeline, and the importance of maintaining a confidential process.

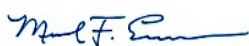
If our firm is selected, Dr. Dennis Smith will be the lead consultant overseeing the search. Assisting him will be Dr. Michael Escalante, Mr. Rich Thome, and Dr. Peggy Lynch. All will be actively involved with this search. In addition, to ensure the widest possible pool of qualified candidates, all partners who are located in various geographical regions of the state will actively support and assist with the search. We will also use our extensive statewide and national network of qualified education leaders to assist us with recruiting a high quality pool of diverse candidates. Profiles of each partner are provided in this proposal.

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

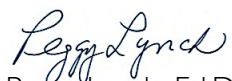
Respectfully,



Dennis Smith, Ed.D



Michael Escalante, Ed.D



Peggy Lynch, Ed.D



Rich Thome



## KEY COMPONENTS OF SEARCH PROCESS

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

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

In conclusion we believe the strengths of our firm are the right match for Oakland Unified School District. The superintendent position is one of the most challenging leadership positions in this



country. It demands a unique knowledge base and skill set. The new superintendent will need to inspire the confidence of teachers, parents, and community leaders, build on the good work done by so many, but never be afraid to challenge everyone to do better and encourage innovative thinking wherever possible. We are the firm that will help the Board find that leader.

### Our Best Practices Include:

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

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



- ✓ **Soliciting Meaningful Engagement, Input and Feedback from All Stakeholders** – An extensive process for stakeholder engagement is critical before the hiring process begins. This ensures accurate data, buy-in and support for both the process and the final candidate. Multiple opportunities should be provided for people to participate.
- ✓ **Using Relevant Data in Developing the Position Description** – This is a key document because it informs the recruiting, reference checking, and interview processes. It should include the information identified and collected from the County's database as well as the input received from the various County focus groups on qualities and characteristics desired, including a description of the County and community. It is critical that the selected candidate is hired for the district he/she will lead and not just the position.
- ✓ **Development of Search Transition Agreements** – Prior to the selection of the superintendent there should be a discussion of the leadership transition process, the roles and responsibilities for the next superintendent, and County Office and Superintendent goals for the coming year.
- ✓ **Communicating Superintendent Search Updates** – Opportunities for regular Board and community updates are critical to both the process and the calibrating of the search criteria as needed.
- ✓ **Strategic Recruiting and Advertising** – Utilizing and tapping into key professional educational networks, outside organizations, business leaders, labor groups, and media outlets are critical in identifying the “match” of candidates for the next superintendent.
- ✓ **Thoughtful Review of Candidates** – The application process provides an initial screening of qualifications; however, an in-depth confidential review of each candidate is critical as a predictor of future performance and success. Reference checking should include people not listed by the candidates. Checking databases is also essential as well as background checks for the finalists.
- ✓ **Rigorous Interview Process** – Leadership Associates remains with the Board during the entire interview process. We help the Board develop questions which are linked to the position description and are carefully analyzed and discussed prior to the interview. Additionally, each question response should be independently rated to assist in the review of candidate performance. All interviewees should be asked a similar set of questions in the first round. The second round with finalists is more informal.

Search committee members commonly make decisions about candidates within the first three minutes of an interview and base these decisions upon personal attraction, candidate reputation or candidate connections to a Board member. Well coached candidates know this. In hiring, it is important to consider these initial reactions but remain focused on the goals and criteria for the hire. The hiring process should be methodical in surfacing these initial reactions and helping Board members make a well-informed decision and to resist the quick and emotional decision.

- ✓ **Selecting the Final Candidate** – The Search Firm should provide protocols to assist the Board with its deliberations about the final candidates and be prepared to assist in arranging a site visit if desired. Representatives of the firm should be available to facilitate the deliberation process.

## PROPOSED SEARCH OPTIONS / WORK PLAN

Leadership Associates has identified several options for the Oakland Unified School District Board of Education to consider for selecting its next superintendent.

### **Option 1: Full Search Process**

The following is a brief description of each of the key steps of the search process. We provide this outline to give you an overview, but also for your reference so you know what we are doing on your behalf throughout the search and particularly in the periods of time between our meetings with you. Our meetings with you are italicized and marked with an asterisk\*.

#### **Phase 1 - *\*Initial Meeting with the Board***

Leadership Associates will meet with the Board once we have been selected to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services. These will certainly include the characteristics the Board is seeking in the next superintendent; District strengths and challenges for the future; the process for engaging groups and individuals in the District and community in the search process; the final timeline and meeting dates; Board and Search Firm protocols during the search; possible contract parameters for the new superintendent; potential internal candidates; the Board's liaison with Leadership Associates and spokesperson for the Board; and all other matters addressed in the RFP Scope of Services which the Board may wish to discuss.

We will also meet with Board members individually, in person or by phone to learn each member's unique perspective.

#### **Phase 2 - Community and Staff Input**

After working with the Board and staff to develop a student, staff, and community engagement plan, we meet with the individuals and groups per your request (Community, staff, students). We share the search process, timeline, answer questions and then solicit input regarding the desired qualities, characteristics, background and experiences of the new superintendent, as well as the key characteristics of the District's culture, strengths, and future challenges and issues. We spend the time necessary to ensure full input. If individuals are unable to attend the meetings, would like to provide additional information, or prefer to submit their ideas in a different format, opportunities are provided to contact us via email or telephone.

We also have an online survey that can be posted on the District website to encourage broader participation of staff and community.

We prepare a thorough report containing the comments from each group, individuals, and the survey, and send it to Board members approximately one week after the input. We follow up with you after you receive the report to review any questions you have.

#### **Phase 3 - Position Description**

The Position Description is prepared reflecting the input we receive on qualities and characteristics desired, a description of the District and community, and key search dates. The Board reviews the

draft and makes changes before the description is finalized. The description is then posted on our website and distributed widely and can be posted on the District's website.

#### **Phase 4 - Advertising, Recruitment, Reference Checking**

After our meetings with the Board, staff and community, we advertise and actively recruit both statewide and nationally. We will also conduct reference and database checks on all potential candidates. All partners participate in this process in order to take advantage of our extensive state and national network. These are very critical activities as we work diligently to find the candidates that best match those qualities and characteristics on the Position Description. We verify degrees, credentials and professional experiences. We do extensive confidential reference checking including conversations with people not listed on the candidate's application. We keep the Board informed on a regular basis about the progress of the search.

#### **Phase 5 - *\*Selection of Finalists***

At this meeting we will review and discuss all applicants, recommend candidates you should consider interviewing, and explain our rationale for recommending some and not others. We will provide an executive summary on each candidate that will include a tiered ranking of candidates for your review. The Board, however, makes the final decision on those to be interviewed and determines the interview schedule and location. We offer sample interview questions and assist the Board in finalizing them. In addition to making interview arrangements with the candidates, we provide all the materials the Board needs for the interview, and make logistical arrangements in coordination with the superintendent's assistant or designated district liaison.

#### **Phase 6 - *\*Final Interviews***

The Board conducts the interviews with the consultants observing and handling all the logistics. We are present during the interviews and will help facilitate discussions assisting the Board as needed to help you in making your selection of the final candidate. We also assist with various follow up steps that need to be completed and inform all candidates of the outcome.

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

The purpose of the visit is to validate the Board's choice prior to the official contract offer. The Board will determine who will go on the visit; the consultants will not participate in the visit. We work with the Board and the finalist as needed to develop final parameters for an agreement on the superintendent's contract. We recommend prior discussions with the Board on this topic since it is our intention to recruit candidates who will work within the contract parameters established by the Board.

We particularly want to note the importance of building longevity incentives into the contract. For example, Leadership Associates is comfortable with a "non-solicitation clause" which will bind us not to recruit the Oakland superintendent for any period of time. We also ask the Board to consider compensation incentives based on longevity and performance and a clause requiring the Superintendent to advise the Board if he/she is applying for another position.

#### **Phase 8 - Public Approval of the New Superintendent**

Following the validation visit, the Board takes public action at a regularly scheduled board meeting to employ the new superintendent. Leadership Associates will assist the Board and staff with a communication plan and other activities to support the approval of the new superintendent's contract.

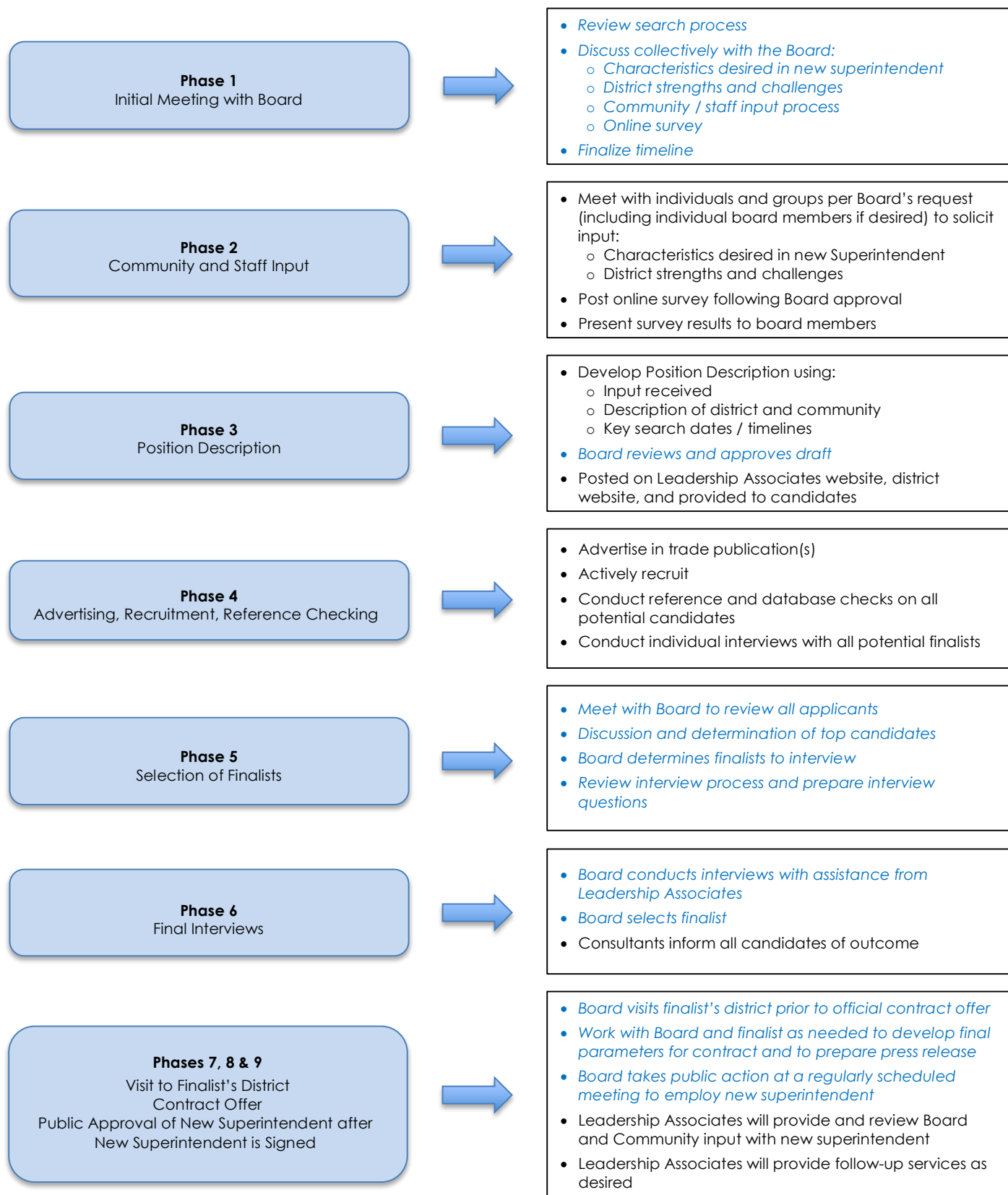
### **Phase 9 - After the New Superintendent is Signed**

We provide and review with the new superintendent the Board and community input. We are available to provide additional follow up services as desired. These services could include developing a transition plan and an initial workshop for the governance team to establish goals for the new superintendent and the superintendent's evaluation process.

Confidentiality: Leadership Associates strongly believes the quality of the applicant pool is directly dependent on the confidentiality of the process. Leadership Associates will not divulge the names of interested applicants to any party other than the Board within Closed Session. Reference checks will also be conducted using strategies that will maintain the confidentiality of the process.

Throughout the process Leadership Associates will be available to answer any questions you may have.

### OPTION 1 SUPERINTENDENT SEARCH PROCESS



Note: *Blue italicized text* indicates Board Participation



## **PROPOSED SEARCH PROCESSES, OTHER OPTIONS**

### **Option Two**

Leadership Associates will assist the Board in updating the profile from the previous search and then recruit 3-5 internal and/or external candidates who meet that profile. These candidates will be presented to the Board and the Board will determine whether to proceed with interviews. Leadership Associates will provide support with the interview process, which may include a stakeholder panel that could meet with the finalists and the Board in Closed Session. The Board will then reconvene and make the final decision.

Cost: \$29,500

### **Option Three**

Leadership Associates will help the Board find an Interim Superintendent who could serve for a six to twelve-month period. The Board would then make a decision to stay with the Interim Superintendent or proceed with a search.

Cost: \$15,000.

## SCOPE OF SERVICES

1. Meet with the Board and individual Board members to assess Board priorities, goals, and objectives to develop a recruitment plan. The Board will determine the scope of the search.
2. Conduct all aspects of the recruitment process as directed by the Board.
3. Develop and implement a plan to engage with relevant stakeholders to help determine desirable attributes for a successful OUSD Superintendent. Create a profile of attributes, knowledge, skills, experience, and values needed for success as an OUSD Superintendent. Synthesize the key criteria for evaluating candidates and establish a related rubric.
4. Work with staff and the Board to develop a plan and timeline for the search that includes community involvement while balancing the need for confidentiality of applicants.
5. Assist the Board in conducting a search that generates a diversified pool of highly qualified candidates that demonstrate a knowledge of and commitment to Oakland's quality community schools.
6. Prepare and distribute and broadly post materials to advertise the position.
7. Assist the Board in developing an appropriate compensation package that supports the recruitment and retention efforts.
8. Timely communicate with candidates in a professional manner, maintain confidentiality of other candidates, and respond to inquiries as appropriate.
9. Screen, evaluate and rank qualified applicants and provide a report on each applicant using criteria established by the Board.
10. Conduct reference and background checks, including unsolicited references, on all interviewees.
11. Provide regular updates to the Board on the status of the search, including any recommendations to improve the process.
12. Coordinate and facilitate the interview process and make necessary arrangements for candidate travel and accommodations.
13. Maintain strict confidentiality throughout the search process, as directed by the Board. Maintain confidentiality of all interviews and closed sessions of the Board.
14. Assist the Board in developing a transition plan for the new Superintendent.
15. Perform other related services and assistance in the conduct of the search.

## OPTION 1 SUGGESTED TIMELINE

Timeline is flexible based on Board direction

DATE		EVENT
December, 2016 – January, 2017	December 12	Leadership Associates submits Proposal to District
	December / January	Consultants present proposal to Board
	December / January	Board selects search firm
January- February, 2017  <b>(Phases 1-4)</b>	January	<i>Board meets with consultants and determines characteristics, skills &amp; qualities desired in a new superintendent, Board publicly announces timeline and procedures for superintendent selection</i>
	January / February	Consultants meet with staff and community designated by Board to receive input; online survey posted
	February	Development and approval of Position Description; Position description posted; Online survey completed
	February	Advertising and active recruitment; Ad appears in AASA and EdCal
February-March, 2017  <b>(Phase 5)</b>	Early March	Deadline for applications
	February / March	Consultants identify candidates
	Mid-March	Consultants complete comprehensive reference and background checks on applicants
	Late March	<i>Board meets with consultants, reviews all applications and selects finalists to be interviewed</i>
April, 2017  <b>(Phases 6-8)</b>	April	<i>Board interviews finalists; schedules meeting for contact approval</i>
	April	<i>Board visits community of leading candidate</i>
	April	<i>Board approves / offers contract</i>
July 1, 2017 <b>(Phase 9)</b>	(or as mutually agreed)	New Superintendent begins

Note: *Blue italicized text* indicates Board Participation

## \*OPTION 2 SUGGESTED TIMELINE

Timeline is flexible based on Board direction

DATE		EVENT
December, 2016 – January, 2017	December 12	Leadership Associates submits Proposal to District
	December / January	<i>Consultants present proposal to Board</i>
	December / January	<i>Board selects search firm</i>
January-February, 2017	January	<i>Board meets with consultants and determines characteristics, skills &amp; qualities desired in a new superintendent, Board publicly announces timeline and procedures for superintendent selection</i>
	January / February	Consultants meet with staff and community designated by Board to receive input; online survey posted
	February	Development and approval of Position Description; Position description posted; Online survey completed
February – April, 2017	February	Recruitment notice; Ad appears in AASA and EdCal; selection of candidates for interview
	March	<i>Board meets with consultants, reviews all applications and selects finalists to be interviewed</i>
	April	<i>Board interviews finalists; visits community of final candidate</i>
	April	<i>Board approves / offers contract</i>
July 1, 2017	(or as mutually agreed)	New Superintendent begins

### \* Option 3 – Timeline to be determined

Note: *Blue italicized text* indicates Board Participation

## ORGANIZATIONAL EXPERIENCE

### I. PROFILE OF FIRM

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

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

In conclusion we believe the strengths of our firm are the right match for San Francisco Unified School District. The superintendent position is one of the most challenging leadership positions in this country. It demands a unique knowledge base and skill set. The new superintendent will need to inspire the confidence of teachers, parents, and community leaders, build on the good

work done by so many, but never be afraid to challenge everyone to do better and encourage innovative thinking wherever possible. We are the firm that will help the Board find that leader.

## II. PROFILE OF CONSULTANTS

1. All keep superintendent searches as their core work
2. All have national and state-wide networks and alliances including Council of the Great City Schools; Urban Dialogue; Association of California School Administrators (ACSA), California Association of Latino School Administrators (CALSA); American Association of School Administrators (AASA); Suburban School Superintendents; and California City School Superintendents
3. All belong to organizations which include top and emerging leaders
4. Three were California State Superintendent of the Year
5. Three chaired the California state superintendents committee for ACSA; two were presidents of ACSA
6. A number are bi-lingual in Spanish
7. Many facilitate workshops in districts throughout the state: board/superintendent relations; board/superintendent protocols; strategic planning; superintendent evaluations; team building; and instructional improvement. Several coach and mentor superintendents and other top district leaders
8. Most have taught or are currently teaching leadership courses at universities
9. All have received awards for educational and community work, regionally, statewide, and nationally; and one was honored by the Mexican Consulate
10. Partners have authored or co-authored the following publications; A Practical Guide to Effective School Board Meetings; Eight at the Top; Superintendent-School Board Practices; and The Superintendent's Planner

## III. KEY TEAM MEMBERS

### Lead Consultants

#### **Dennis Smith, Ed.D, Lead Partner**

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (25,000 ADA) in Orange County until his retirement in June 2012. He also served as superintendent of the Orange County Public Schools in Orlando, Florida, the 16th largest school district in the United States. Prior to that, he served as superintendent of the Irvine Unified, Cajon Valley Union and Laguna Beach Unified School Districts. Dennis served a total of 26 years as a Superintendent of Schools. Dennis has experience conducting executive searches since 2005, and has facilitated or assisted in the facilitation of more than 20 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as

President of the Southern California Superintendents' Association. Dennis received his Bachelor of Arts and Master's Degree from Arizona State University and his Doctorate from the University of Arizona. In addition, he has been an adjunct faculty member at California State University, Fullerton. Dennis has spoken at the local, state and national level on Board-Superintendent relations, Strategic Planning and Goal Setting and Organizational Management. He has consulted with school districts across the United States assisting school boards with superintendent searches and conducting workshops, trainings and organizational efficiency audits.

### **Michael Escalante, Ed.D, Co-Lead**

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

### **Peggy Lynch, Ed.D, Co-Lead**

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of more than 30 executive searches. She received her doctorate from the University of La Verne, her Master's Degree from Fullerton and her Bachelor's Degree from Parsons College in Iowa. Peggy chaired the ACSA Orange County and San Diego County Superintendents, was chair of the ACSA Superintendents' Symposium and ACSA's State Annual Conference. Peggy has received recognition from various organizations, including Southern California Women in Educational Management, Stanford University School of Engineering and the PTA. She has also co-authored several books, including Effective Superintendent-School Board Practices; The Superintendent's Planner, A Monthly Guide and Reflective Journal; and Eight at the Top: A View Inside Public Education.

### **Rich Thome, Co-Lead**

Rich served as Superintendent of Schools for South Bay Union School District and Cardiff Elementary School District. He has conducted more than 65 executive searches and more than 104 Board workshops or Superintendent Evaluations with School Boards. He also serves as part-time as Director of Partnerships for the Institute for Entrepreneurship in Education (IEE), a professional development and research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. Rich recently served on the University of San Diego School of Leadership and Education Sciences Advisory Board and on the Classroom of

the Future Foundation Board of Directors. He received his Bachelor's Degree from California State University, Los Angeles, and his Master's Degree from Pepperdine University. He is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich has been honored with the Honorary Service Award from the California Congress of Parents, Teachers and Students; The Orange County Hispanic Educator of the Year Award; and the Apple Distinguished Educator Award. Rich gained state-wide distinction while serving as Chairperson of the Superintendents' Technology Advisory Committee and leading the expansion of technology centers and efforts of school districts throughout the region as the Assistant Superintendent of Technology and Human Resources for the County of San Diego.

### **Other Partners**

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

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

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

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



**Marc A. Ecker, Ph.D – Partner**

Marc retired in December, 2014 as Superintendent of the Fountain Valley School District for 18 ½ years in that position. He served as Chair of the Orange County Special Education Alliance and is a past president of the Orange County Superintendents' Organization. Marc is a past State President of the Association of California School Administrators (ACSA). He served with other leading superintendents in providing input and advice on the development of the Local Control Funding Formula to the Governor and his staff. He also served on the State Public Schools Accountability Act Advisory Committee and two terms on the Financial Crisis Management Assistance Team Advisory Board. Marc is the financial officer for the California League of Schools and served as president of the Association of Middle Level Education. He is a full time faculty member at California State University, Fullerton in the position of Distinguished Professor in the College of Education. He directs the ACSA mentor program and is currently the chairperson of the Schools First Federal Credit Union Board of Directors. Marc received his Bachelor's Degree from UCLA, his Master's Degree from California State University, Fullerton and his Doctorate from Alliant University.

**Richard Fischer – Associate**

Rich served as Superintendent of Schools for 19 years in the Mountain View Los Altos Union High School District, Lake Tahoe Unified School District and the Harmony Union School District. He currently serves as Director of the Executive Leadership Center and is also a member of the El Dorado County Board of Education. Rich has been Director for the ACSA Superintendents' Academy and presenter and trainer for California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendents' Symposium, El Dorado County Instructional Leaders - Series on Effective Leadership Techniques, Leadership Mountain View, and California School Leadership Academy. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

**Sally Frazier, Ed.D – Partner**

Sally was elected Madera County Superintendent of Schools for six consecutive 4-year terms. She received her Doctorate from University of Southern California, and her Master's and Bachelor's degrees from California State University, Stanislaus. Sally served the California County Superintendents' Educational Services Association as President, Legislative Chairperson and numerous terms on its Executive Board. She was CCSESA's representative to ACSA's Superintendents Committee and its liaison to the Springboard Schools Board of Directors. Sally chaired CCSESA's Commission on the Organization of Policy Groups, Organizing for Action. Sally was appointed by former State Superintendent of Public Instruction, Delaine Eastin, to the Education Commission for Technology in Learning. Sally was also appointed by Governor Schwarzenegger to the Advisory Commission on Juvenile Justice and Delinquency.

**Don Iglesias – Partner**

Don served as Superintendent of San José Unified School District, the South Bay's largest school district with more than 32,000 students K-12. The district is culturally diverse with students speaking 85 languages and more than one-third designated as low income. Don was the State President of the Association of California School Administrators (ACSA), representing over 16,000 members statewide. He received his Bachelor's Degree from the University of California,

Berkeley and his Master's Degree in Multicultural Education from the University of Southern California. During his tenure as Superintendent, San José Unified was recognized by the Editorial Projects in Washington D.C. for having the second highest graduation rate in the nation for urban school districts among the nation's 50 largest cities. Graduation rate for seniors was 93%. Don served as the Chair of the Silicon Valley Chamber of Commerce Education Committee and as the Conference Chair for the California Superintendents' Symposium. He was also President of the California City Superintendents' organization. San José Magazine recognized Don as a member of the Power 100, the most influential people in the Silicon Valley and the Bay Area.

### **Phil Quon – Partner, Chief Financial Officer**

Phil served as Superintendent for 19 years in the Bay Area – 13 years at Union School District in San José and the last six years in Cupertino Union School District. He served as the President of the statewide ACSA Superintendents Council, the Chair of the ACSA Superintendents' Symposium, and the President of the California City School Superintendents. He also served on the American Association of School Administrators (AASA) Governing Board and on the CSBA Annual Education Conference Planning Committee and Education Legal Alliance Advisory Group. He has been the Director of the ACSA Superintendents Academy as well as a presenter in the ACSA "Leading the Leaders" Program for newly appointed superintendents in California. He has chaired numerous WASC accreditation teams in California and Hawaii. Phil was a member of the CTC Teaching Mathematics Advisory Panel and a contributor to the National Journal Online Education Blog. Phil received his Bachelor's Degree in Mathematics from UCLA and his Master's Degree in Education Administration from CSULA.

### **Sandy Sanchez Thorstenson – Associate**

Sandy Sanchez Thorstenson served as the Superintendent of the Whittier Union High School District for fifteen years having spent her entire 39-year career in Whittier Union. Prior to becoming Superintendent, Mrs. Thorstenson served as Assistant Superintendent, Educational Services, High School Principal, Assistant Principal and Teacher. The Whittier Union High School District, a minority-majority high school district with a student enrollment comprised of eighty-six percent Latino and sixty-nine percent socio-economically disadvantaged students, has demonstrated remarkable gains in student achievement at every school, in multiple indicators and over time. Most importantly, Whittier Union has narrowed the achievement gap from 35% to 9% and has proven on behalf of their students that demographics do not determine destiny. The Association of California School Administrators selected Mrs. Thorstenson as California's 2016 recipient of the Marcus Foster Administrator Excellence Award and its 2012 California Superintendent of the Year for AASA. She was selected as ACSA's Region XV Superintendent of the Year for 2007. Sandra Thorstenson served as president of ACSA's State Superintendency Council, president of California City School Superintendents Association, and was a member of Southern California Superintendents' Association and Urban Education Dialogue. She also served on the board for Pivot Learning Partners and the board of directors for the Whittier Chamber of Commerce. Mrs. Thorstenson was appointed by Governor Brown as the superintendent representative of the five-member board of the California Collaborative for Educational Excellence and served as chair helping to launch the state agency focused on providing support and assistance to school districts throughout California. She is a member of the California Collaborative for District Reform, serves on the board of directors of the Soroptimist International of Whittier and is an associate partner with Leadership Associates.

**David J. Verdugo, Ed.D – Associate**

David served as Superintendent of Schools for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as the Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA) and has held positions of Assistant Superintendent, Director of Secondary Education, Principal at both Elementary and High School levels as well as teacher and coach. David has served a total of 43 years in the field of education spanning Grades K-12. During his 43 years in the field of education, his duties have included school facility management; extensive involvement with budget development, implementation of technology programs, employer/employee relations, curriculum and instructional strategies, and organizational development. His experience includes servicing students of diverse populations and socioeconomic levels in urban and suburban settings. He was named ACSA's 2008 Region 14 Superintendent of the Year, and received the California State University Long Beach Outstanding Superintendent Leadership Award in 2012 and the ALAS, Association of Latino Administrators and Superintendents, National Outstanding Educator Award in 2013. He earned his Bachelor's Degree from Whitworth College in Spokane, Washington and his Master's Degree from the University of La Verne. His Doctoral Degree in Educational Administration was earned at the University of Southern California. Dr. Verdugo is a past Governing Board member to AASA and has addressed and spoken on State and National topics from building a case for reform to the importance of Arts in schools. Currently he is the Executive Director of the California Association of Latino Superintendents as well as the former Superintendents Leadership Academy Director for the Association of Latino Administrators and Superintendents based in Washington, D.C.

## REFERENCES / SIMILAR PROJECT EXPERIENCE

- 1. District:** **SAN JOSE UNIFIED SCHOOL DISTRICT**  
Contract Service: Superintendent Search  
Contact Name: Teresa Castellanos, Board President  
Phone: (408) 309-3580  
Email: [tcastellanos@sjusd.org](mailto:tcastellanos@sjusd.org)  
Contact Name: Pam Foley, Board Vice President  
Phone: (408) 505-1414  
Email: [pam@effoley.com](mailto:pam@effoley.com)  
Year: 2010 & 2016  
Consultants: Don Iglesias, Peggy Lynch, Phil Quon  
Project Outcome: Placement of Superintendent, Nancy Albarran (Current)
- 2. District:** **WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT**  
Contract Service: Superintendent Search  
Contact Name: Randy Enos, Board President  
Phone: (510) 932-2504  
Email: [randallenos@sbcbglobal.net](mailto:randallenos@sbcbglobal.net)  
Year: 2016  
Consultants: Jim Brown, Don Iglesias, Dennis Smith  
Project Outcome: Placement of Superintendent, Matt Duffy (Current)
- 3. District:** **PITTSBURG UNIFIED SCHOOL DISTRICT**  
Contract Service: Superintendent Search  
Contact Name: Duane Smith, Board President  
Phone: (925) 473-2336  
Year: 2014  
Consultants: Don Iglesias, Sally Frazier  
Project Outcome: Placement of Superintendent, Jane Schulze (Current)
- 4. District:** **RIVERSIDE UNIFIED SCHOOL DISTRICT**  
Contract Service: Superintendent Search  
Contact Name: Tom Hunt, Board President  
Phone: (951) 788-7135 ext 80417  
Email: [thunt@rusd.k12.ca.us](mailto:thunt@rusd.k12.ca.us)  
Year: 2014  
Consultants: Kent Bechler, Rich Thome, Gwen Gross  
Project Outcome: Placement of Superintendent, David Hansen (Current)
- 5. District:** **CORONA-NORCO UNIFIED SCHOOL DISTRICT**  
Contract Service: Superintendent Search  
Contact Name: Cathy Sciortino, Board Member  
Phone: (951) 316-3272  
Email: [csciortino@cnusd.k12.ca.us](mailto:csciortino@cnusd.k12.ca.us)  
Year: 2012  
Consultants: Larry Aceves, Gwen Gross  
Project Outcome: Placement of Superintendent, Michael Lin (Current)

\* Oakland Unified Superintendent Search, 2014; Consultants, Dennis Smith, Jim Brown, Mike Escalante  
Outcome: Placement of Superintendent, Antwan Wilson (Current)

## COST PROPOSAL

**\*TOTAL FEE TO CONDUCT OPTION 1**

FULL SEARCH FOR NEW SUPERINTENDENT – All Inclusive: **\$42,500**

Plus consultant business expenses not to exceed \$5,000, and candidate travel as approved by the Board.

**\*TOTAL FEE TO CONDUCT OPTION 2**

ABBREVIATED SEARCH FOR NEW SUPERINTENDENT: **\$29,500**

Plus consultant business expenses not to exceed \$5,000, and candidate travel as approved by the Board.

**TOTAL FEE TO CONDUCT OPTION 3**

INTERIM SUPERINTENDENT SEARCH: **\$15,000**

\*Fee for both, Options 1 and 2 includes:

- All meetings with the Board
- Gathering of community and staff input and providing Board with a written report, including online survey
- Assisting in the development of interview questions
- Acting as an advisor to the Governing Board
- Development and posting of the position description and recruitment announcement
- Cost of advertising in EdCal and AASA
- Acceptance of applications and responding to all inquiries regarding the position
- Recruitment of candidates and extensive background checks
- Coordination of logistics of the search:
  - Scheduling appointments
  - Notifications to unsuccessful candidates
  - Scheduling community visit
- Assisting the superintendent's executive assistant
- Assisting the new superintendent and Board through transition and first year
- Guarantee that should the new superintendent leave within one year, Leadership Associates will conduct a new search with no consultant fee, costs for travel and advertising expenses only, provided the Board majority remains the same

## LEADERSHIP ASSOCIATES SEARCHES

### **STATEWIDE**

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

### **COUNTY OFFICE OF EDUCATION SUPERINTENDENT**

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

### **SCHOOL DISTRICT SUPERINTENDENT (2013-Current)**

<b>District</b>	<b>County</b>	<b>ADA</b>
San Francisco USD	San Francisco	58,865
Santa Ana USD	Orange	57,410
Capistrano USD	Orange	53,833
Corona-Norco USD	Riverside	53,148
Sacramento City USD	Sacramento	47,616
Oakland USD	Alameda	46,486
Riverside USD	Riverside	42,560
Fontana USD	San Bernardino	40,374
San Jose USD	Santa Clara	32,938
Anaheim Union HSD	Orange	32,085
Mt. Diablo USD	Contra Costa	31,923
San Ramon Valley USD	Contra Costa	31,900
West Contra Costa USD	Contra Costa	30,596
Bakersfield City SD	Kern	30,262
Rialto USD	San Bernardino	26,468
Placentia-Yorba Linda USD	Orange	25,821
Palm Springs USD	Riverside	23,332
Lake Elsinore USD	Riverside	22,000
Hemet USD	Riverside	21,977
Pajaro Valley USD	Santa Cruz	20,438
Anaheim City SD	Orange	19,312
Antioch USD	Contra Costa	18,352
Ventura USD	Ventura	17,430
Santa Rosa City Schools	Sonoma	16,700
Oxnard School District	Ventura	16,533
Burbank USD	Los Angeles	16,207
Cajon Valley Union SD	San Diego	16,059

Proposal for Executive Search  
Oakland Unified School District  
Superintendent Search, 2016-17

<b>District</b>	<b>County</b>	<b>ADA</b>
Paramount USD	Los Angeles	15,681
Walnut Valley USD	Los Angeles	14,658
West Covina USD	Los Angeles	14,402
Fullerton SD	Orange	13,661
Vacaville USD	Solano	12,561
San Dieguito Union HSD	San Diego	12,485
Palo Alto USD	Santa Clara	12,357
Natomas USD	Sacramento	12,300
Metropolitan Education	San Jose	12,000
Oak Grove School District	Santa Clara	11,800
Victor ESD	San Bernardino	11,531
Franklin---McKinley SD	Santa Clara	11,269
Lucia Mar USD	San Luis Obispo	10,710
Pittsburg USD	Contra Costa	10,560
Azusa USD	Los Angeles	10,518
Dublin USD	Alameda	10,000
Roseville City ESD	Placer	9,943
Yucaipa---Calimesa Joint USD	San Bernardino	9,655
Ocean View SD	Orange	9,461
Davis Jt. USD	Yolo	8,626
San Mateo Union HSD	San Mateo	8,163
Novato USD	Marin	8,078
South Bay Union ESD	San Diego	7,682
Santa Maria JUHSD	Santa Barbara	7,633
Santa Cruz City Schools	Santa Cruz	7,092
Newhall SD	Santa Clara	6,831
Fountain Valley USD	Orange	6,337
Newark USD	Alameda	6,294
Ukiah USD	Mendocino	6,214
Brea Olinda USD	Orange	5,973
Alta Loma SD	San Bernardino	5,900
Orcutt Union ESD	Santa Barbara	5,087
Oakley Union SD	Contra Costa	4,871
Moreland SD	Santa Clara	4,670
San Lorenzo Valley USD	Santa Cruz	4,444
Ravenswood City SD	San Mateo	4,296
Paradise USD	Butte	4,261
Duarte USD	Los Angeles	4,247
Lindsay USD	Tulare	4,150
Central Union HSD	Imperial	4,104
Cypress SD	Orange	4,000
Eureka City Schools	Humboldt	3,884

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

#### **EXECUTIVE DIRECTOR/DIRECTOR**

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



## *Cover Sheet*

1. McPherson & Jacobson, L.L.C.  
7905 L St., Suite 310  
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Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)
2. McPherson and Jacobson, L.L.C. is applying as a Firm.
3. CEO/Owner: Thomas Jacobson
4. Telephone: 402-991-7031/888-375-4814  
Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)
5. McPherson & Jacobson, L.L.C. is not currently an OUSD contractor.
6. McPherson & Jacobson, L.L.C. has not served the OUSD as a contractor before.



*A Proposal Prepared for*

***Oakland Unified  
School District  
Oakland, California***

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted in collaboration with*



*by*

**MCPHERSON *MJ* JACOBSON, LLC**

**Executive Recruitment & Development**

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



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December 9, 2016

Board of Education  
Oakland Unified School District  
1000 Broadway Suite 680  
Oakland, California 94607

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 Oakland Unified School District in ensuring your superintendent search secures quality leadership for the district.

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

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

Our contact information:

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

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

Sincerely,

*Thomas Jacobson*

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



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## ***The McPherson & Jacobson Difference***

### ***“It’s About the Kids”***

- WE BELIEVE every student is entitled to a high quality education. We strongly believe quality education is dependent upon quality leadership.
- OUR MISSION is to ensure your search results in quality leadership for education excellence.

McPherson & Jacobson has developed a protocol that provides for high involvement of stakeholders, while keeping the board in complete control of the process.

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process. The openness of the process has not gone unnoticed. In the *Transparency—The McPherson & Jacobson Difference* section of this proposal you will find a selection from the many articles discussing McPherson & Jacobson’s stakeholder involvement, and editorials from newspapers across the country praising boards for being open, transparent, and doing the public business in the public.



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

### **Leading National Search Firm**

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 650 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.**

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

McPherson & Jacobson has **over 100 consultants** across the nation. Almost one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

### **Sustainability in Leadership**

Waters and Marzano (2006) review of 3.4 million students' achievement scores found that Superintendents' tenure is positively correlated with student achievement.

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



## ***Executive Summary***

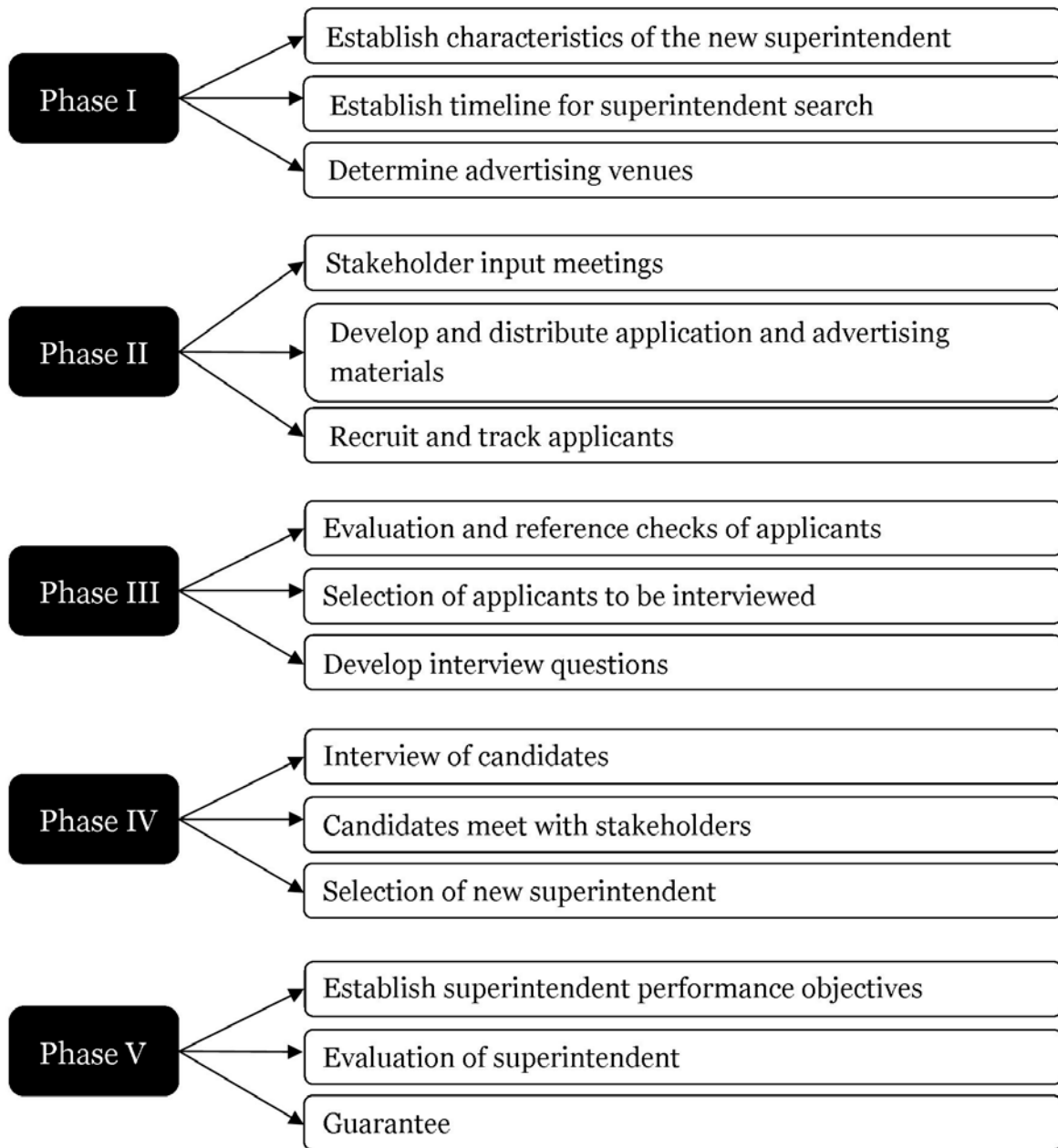
McPherson & Jacobson L.L.C. provides a comprehensive search process. Below are some of the highlights of our process:

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

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



## ***Five Phases of a Superintendent Search***







## *Phase I*

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

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

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

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

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

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

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

✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

## *Phase II*

In Phase II McPherson & Jacobson's consultants will:

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

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

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

The consultants will meet with the stakeholder groups identified by the board and solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the issues facing the new superintendent, and the characteristics they would like to see the new superintendent possess. The board chooses which groups it would like the consultants to meet with, but the most common groups include central office administrators, building administrators, teachers, classified staff, students, and community and business groups. The consultants will assist the board in choosing which groups it wishes to include.

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

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

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

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

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

McPherson & Jacobson's staff will prepare and place the announcement of vacancy. It will be sent to all state school board and administrator associations, as well as media venues selected by the board. Additionally, McPherson & Jacobson maintains an interactive website ([www.macnjake.com](http://www.macnjake.com)) that allows applicants to access all the application materials and apply on line. The website averages over 150,000 hits per month.

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

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

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

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

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

*Priscilla Cox, Elk Grove Unified School District, CA*

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

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

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

*Tamara Jones, Lakeside Union School District, Bakersfield, CA*

*"Thorough and open review of all candidates."*

*Michael Leydon, Newcastle Elementary School District, Newcastle, CA*

*"Best price, best service."*

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

### *Phase III*

In Phase III McPherson & Jacobson's consultants will:

✓ **Evaluate each applicant against the selection criteria.**

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

✓ **Conduct reference checks.**

We understand that applicants do not submit references who will not speak highly of them. We begin with the references given and ask them a list of questions relevant to the selection criteria. After asking those questions, we ask each reference to give us the names of other people who can speak of the applicant's qualifications. We then call those individuals and ask them the same set of questions, including asking them to give us the names of other people who can speak of the applicant's qualification. We go a minimum of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

## *Phase IV*

In Phase IV McPherson & Jacobson's consultants will:

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

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

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

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

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

Working with the board and the point of contact, the consultants will assist in establishing the finalist interview schedule that includes district staff, students, and community groups. A typical interview day will include a tour of the district and community, meeting with stakeholder groups, and a formal interview with the board.

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

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

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

We encourage boards to invite spouses/significant others to attend the interview day. The consultants will coordinate, with the point of contact, a portion of the interview day for the spouse/significant other to have an expanded visitation of the community. Tours typically include available housing, medical facilities, churches, recreational opportunities, and areas of interest unique to your community.

✓ **Assist the board in making final arrangements for each candidate's visit.**

It is common practice for the district to pay interview expenses for the candidates and their spouses/significant others. In order to ensure that expenses stay within established guidelines, the consultants will assist the point of contact in making lodging and travel arrangements for each candidate.

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

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

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

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

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

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

✓ **Conduct background checks.**

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

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

*Priscilla Cox, Elk Grove Unified School District, CA*

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

*Michael Leydon, Newcastle Elementary School District, Newcastle, CA*

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

*Chet Madison, Elk Grove Unified School District, CA*

## *Phase V*

In Phase V McPherson & Jacobson's consultants will:

✓ **Establish performance objectives for new superintendent.**

Working with the board and new superintendent, the consultant will assist in establishing two or three performance objectives the board wants the superintendent to focus on during the first year. These objectives are beyond the day-to-day school district operations.

Once the performance objectives have been identified, board members will be asked what they will accept as evidence of progress towards the accomplishment of the identified objectives.

The superintendent will take the information generated from this session and develop an action plan for achieving the performance objectives. The action plan will be presented to the board for formal approval and forwarded to McPherson & Jacobson's home office.

✓ **Provide a guarantee.**

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

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

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

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

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



## ***Timeline***

The timeline for the search process is established when we meet with the board so we can address the unique needs of the district. However, the time from our first meeting with the board until the finalist is selected is typically a minimum of two to three months.

Search sequence:

- At the beginning of the search
  - Advertising decisions are made
  - The qualities for the new superintendent are identified
  - Application information is posted
  - A formal timeline is established
  - A brochure is created to advertise the district and the vacancy
- At the time designated by the board
  - Stakeholder group meetings are held
  - A summary of stakeholder input is presented to the board
- As applications arrive in our office
  - Applications are monitored and applicants are notified of the deadlines to submit their materials
- After the closing date
  - All the completed applicant files are forwarded to the consultants
  - The consultants begin the review and pre-interview process
- Approximately two to four weeks after the closing date
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles of qualified candidates to the board
  - The board selects the candidates it wants to interview
  - McPherson & Jacobson notifies each applicant not selected for an interview
- Soon after the board selects their candidates
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent
  - A criminal/financial/credential verification background check is conducted on the selected candidate
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status



## ***Stakeholder Involvement***

### **Initial stakeholder input sessions**

The consultants will meet with groups identified by the board to solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the characteristics they would like to see the new superintendent possess, and the issues facing the new superintendent. The results of these meetings are summarized by the consultants and presented to the board. The board chooses which groups it would like the consultants to meet with, but the most common groups include central office administrators, building administrators, teachers, classified staff, students, and community and business groups. The consultants will assist the board in choosing which groups it wishes to include. An online survey option will be provided to stakeholders who are unable to attend the scheduled meetings.

### **Meeting the candidates**

A representative group of eight to twelve people will be selected to represent each of the groups identified by the board. The consultants will meet with a chairperson for each group to discuss their roles and responsibilities. The purposes of these groups are two-fold: one, to promote the school district and community to the candidate; and two, to form an impression of each candidate, which they will share with the board. The consultants will coach each group on how to conduct the meeting with each candidate and what questions they can or cannot ask. The consultants will also provide the chairpersons with a form in which, using group consensus, they will record their impressions of each candidate. The forms will be sealed in an envelope after meeting with each candidate and turned in to the district contact person. Upon completing the interview process with all candidates, the board will receive and open the forms from each group.

### **Process for Obtaining Staff Input**

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

Our normal protocol is to host meetings for the teachers and classified staff in the afternoon, right after school dismissal to give the maximum opportunity for the staff to participate. Central office and building administrator meetings are scheduled at multiple locations to maximize the opportunities for their input.

### **Process for Obtaining Parent and Community Input**

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

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

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

## ***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 100 consultants across the United States; we will send the information to all of our consultants across the United States, asking them to nominate candidates who would be a good match. Those candidates will be invited to apply. Some of our best candidates may not be actively seeking another position and will need to be recruited.

We do not maintain a stable of candidates, but we do follow the careers of successful administrators. Individuals who are currently looking to take a new position are encouraged to register with us so they can receive notification of the vacancies we are representing. We have over 900 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 have been invited two years in a row to be the only national firm to have a presence at the American Association of School Administrators' Female and Minority Administrators' conference. In addition, we have maintained an ongoing presence at the National Association of School Boards' annual conference. We represent three state school board associations as their superintendent search process; therefore we are the only private firm allowed to participate in their Job Central.



## ***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 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.

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.





## ***Communicating and Working with the Board***

The consultants will be in contact with the board during the search 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.

The consultants are available to meet with the board for additional issues, if the board desires; however, there is an additional fee for these meetings.



## ***Responsibilities of Oakland Unified School District and McPherson & Jacobson, L.L.C.***

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

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

## Oakland Unified School District

Event	School District's Tasks
1 <sup>st</sup> Board Meeting	<input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the board member list <input type="checkbox"/> Reviews the brochure
Community meetings are scheduled	<input type="checkbox"/> Names and addresses are sent to Home Office for community member stakeholder meeting invitations <input type="checkbox"/> Notifies internal stakeholders of times and locations for stakeholder meetings <input type="checkbox"/> Posts dates, times and locations of meetings and public forum(s) and encourages stakeholder attendance <input type="checkbox"/> Publishes link to online stakeholder input survey
3 <sup>rd</sup> board meeting	<input type="checkbox"/> Board decides if they wish to conduct semi-finalist interviews <input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour <input type="checkbox"/> Arrange logistics for stakeholder focus groups
Semi-finalist Interviews	<input type="checkbox"/> The board interviews each semi-finalist <input type="checkbox"/> The board determines the finalists to be interviewed
Interviews	<input type="checkbox"/> One candidate per day <input type="checkbox"/> Board member greets each candidate upon arrival to district <input type="checkbox"/> Coordinates candidate's meeting with stakeholder focus groups and retrieval of input forms <input type="checkbox"/> Informal interview-social setting <input type="checkbox"/> Formal interview <input type="checkbox"/> Spouse/significant other's visitation is coordinated
Meeting to Select Finalists/ Finalist selected and accepted	<input type="checkbox"/> Board members meet and discuss each candidate individually <input type="checkbox"/> Individually rank order candidates <input type="checkbox"/> Read input forms submitted by stakeholder focus groups <input type="checkbox"/> Select minimum of #1 and #2 candidates <input type="checkbox"/> Contact consultant with selection results <input type="checkbox"/> Send interview forms and files to the Home Office <input type="checkbox"/> Board completes an evaluation of the search service provided by McPherson & Jacobson
Phase V	<input type="checkbox"/> Superintendent creates plan with target objectives and timelines <input type="checkbox"/> Board adopts plan <input type="checkbox"/> Send copy of plan to Home Office



## ***Advertising***

The consultants will discuss with the board the advertising options available and the pricing for them. The minimum advertising we would recommend is AASA online, and *TopSchoolJobs.org* online.

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 150,000 hits per month
- Information regarding the position will be sent to the over 100 McPherson & Jacobson consultants located nationwide asking for names of potential applicants
- The over 2,000 potential applicants registered with McPherson & Jacobson will receive an email giving them opportunity to apply





## ***Applicant Confidentiality***

Names of applicants will be held in strict confidence whenever possible; however, McPherson & Jacobson complies with individual states' Freedom of Information laws.



## ***Investment***

**The investment for conducting the superintendent search is \$36,900 for Phases I-V.**

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

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

### **Estimate of expenses:**

The following expenses are estimated. McPherson & Jacobson is willing to provide a maximum not to exceed amount, which includes the fee and expenses.

<b>I. Advertising Expenses</b>	<b>\$ 2,000*</b>
<b>II. Travel Expenses</b>	<b>\$ 11,550**</b>
<b>III. Office Expenses</b>	<b>\$ 800***</b>
<b>IV. Video interviews of short list candidates (\$50/candidate)</b>	<b>\$ 250^</b>
<b>V. Criminal/Financial Background Checks</b>	<b>\$ *****</b>

\* Includes 30 days on EdJoin, one EdCal print ad, 30 days on American Association of School Administrators website (AASA.org) and 30 days on TopSchoolJobs.org, this amount will increase if the board chooses additional advertising media.

\*\* Includes travel, lodging, and meals for all consultants for the trips included in the proposal to the district. *(This expense includes two (2) teams of two (2) consultants for four (4) days of stakeholder meetings. This amount may decrease or increase dependent upon the number of stakeholder meetings the board chooses to have McPherson & Jacobson conduct.)*

\*\*\* Includes development and printing of Announcement of Vacancy, copying costs, telephone expenses, and postage

^Estimated based on a majority of searches having five shortlist candidates. The expense will vary based on the number of shortlist candidates.

\*\*\*\*\* Included in the fee is the criminal/financial/credential verification background check for the selected candidate. If the board chooses to conduct background checks on all the finalist candidates, the district will be charged the actual cost for the background check, a minimum of \$125 per candidate.

### **NOTE:**

- Interview expenses for the candidates are not included in the expenses listed above.

**Additional Services:**

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

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

## ***Price Breakdown for Search Activities***

<b>Phase</b>	<b>Description of Services</b>	<b>Fee</b>	<b>Expenses</b>	<b>Additional Costs/Notes</b>
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$ 8,200	\$ 4,050	Expenses include consultant travel and \$2,000 in advertising costs. Advertising costs are determined by the media selected by the board; therefore, this amount is an estimate only.
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$ 9,500	\$ 7,650	Expenses are based on two (2) teams of two (2) consultants conducting stakeholder meetings for four (4) days. If the board chooses additional meetings beyond the four (4) days, the expenses will increase. The fee for additional days of stakeholder meetings is \$500 per day per consultant plus expenses.
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$ 9,500	\$ 300	Expenses include office expenses for candidate recruitment and conducting reference checks.
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.	\$ 8,200	\$ 2,300	Expenses include preparation of materials, consultant travel expenses and video interviews of five candidates.
V	Meet with the board to determine the superintendent performance objectives.	\$ 1,500	\$ 300	Expenses include preparation of materials and consultant travel expenses.
<b>Totals</b>		<b>\$36,900</b>	<b>\$14,600</b>	<b>Fees and/or expenses will increase if</b> <ol style="list-style-type: none"> <li><b>1. the board chooses advertising media over \$ 2,000;</b></li> <li><b>2. the board requests more than four (4) days of stakeholder input sessions;</b></li> <li><b>3. The board requests more than 5 shortlist candidates</b></li> <li><b>4. the board requests consultants be present at meetings not included above;</b></li> <li><b>5. actual travel costs increase due to changing prices.</b></li> </ol>
	<b>Total*</b>	<b>\$51,500</b>		<i>*based on parameters above</i>



## ***Selected References***

### **Glendale Unified School District**

223 North Jackson St.  
Glendale CA 91206  
School Phone: 818-241-3111  
School District Contact: Phyllis  
Board Contact: Christin Walters, 818-749-5885  
Search Year: 2015/16  
Enrollment: 26,200

### **Elk Grove Unified School District**

9510 Elk Grove-Florin Rd.  
Elk Grove CA 95624  
School Phone: 916-686-5085  
School District Contact: Arlene Hein  
Board Contact: Priscilla Cox, 916-689-3518  
Search Year: 2014/15  
Enrollment: 62,000

### **Charlotte-Mecklenburg Schools**

600 E. Fourth St., Fifth Floor  
PO Box 30035 (zip 28230)  
Charlotte NC 28202  
School Phone: 980-343-5139  
Board Contact: Mary McCray, 704-281-6004  
Search Year: 2015/16  
Enrollment: 145,363

### **Wake County Public School System**

5625 Dillard Dr.  
Cary NC 27518  
School Phone: 919-431-7400  
School District Contact: Melissa Allen  
Board Contact: Keith Sutton, 919-606-6572  
Search Year: 2012/13  
Enrollment: 146,687





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

**Alisal Union School District**

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

**Alpine Union School District**

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

**Benicia Unified School District**

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

**Brawley Elementary School District**

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

**Conejo Valley Unified School District**

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

**El Monte Union High School District**

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

**Elk Grove Unified School District**

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

**Fallbrook Union High School District**

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

**Fort Sage Unified School District**

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

**Glendale Unified School District**

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

**Gustine Unified School District**

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

**Hemet Unified School District**

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

**Johnstonville Elementary School District**

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

**Lakeside Union School District**

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

**New Haven Unified School District**

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

**Newcastle Elementary School District**

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

**Old Adobe Union School District**

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

**Oxnard Union High School District**

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

**Paso Robles Joint Unified School District**

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

**Penn Valley Union Elementary School District**

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

**Pleasanton Unified School District**

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

**Pollock Pines Elementary School District**

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

**Red Bluff Joint Union High School District**

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

**Richland School District**

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

**Sausalito Marin City School District**

200 Phillips Drive

Marin City CA 94965

School Phone: 415-332-3190

Search Year: 2015/16

Enrollment: 524

**Winship-Robbins Elementary School  
District**

4305 S Meridian Rd

Meridian CA 95957

School Phone: 530-696-2451

Search Year: 2013/14

Enrollment: 200



## *Consultants for Search*

### **Thomas Jacobson Ph.D.**

#### **PERSONAL INFORMATION**

Name: THOMAS P. JACOBSON  
Address: 6930 S. 163 Cir.  
Omaha, Nebraska 68136  
Phone: (402) 943-7540 cell  
(402) 991-7031 office

#### **EDUCATIONAL BACKGROUND**

1983-86	Ph.D.	University of Minnesota Educational Administration
1977-80	Ed.S.	University of Minnesota Educational Administration
1971-73	M.S.	St. Cloud State University Educational Administration
1965-69	B.S.	Bemidji State University Elementary Education

#### **EXPERIENCE**

1996 -	Chief Executive Officer/Owner Key Concepts L.L.C.
1991 -	Chief Executive Officer/Owner McPherson & Jacobson L.L.C.
1991 -	Associate Professor University of Nebraska at Kearney Kearney, Nebraska
1988-91	President Consortium for School Improvement Gunnison, Colorado
1986-90	Superintendent Gunnison Watershed School District Gunnison, Colorado
1987-89	Adjunct Professor Western State College Gunnison, Colorado
1980-86	Superintendent Remer/Longville ISD #118 Remer, Minnesota
1982-84	Supervising Superintendent Tri-County Coop Grand Rapids, Minnesota
1979-80	Assistant Superintendent for Curriculum, Instruction, and Personnel Remer/Longville ISD #118 Remer, Minnesota
1975-79	Elementary Principal Remer/Longville ISD #118



## **WILLIAM M. HUYETT**

241 River Oaks Drive  
Lodi, CA 95240  
(209) 334-3375 (home)  
[williamhuyett@sbcglobal.net](mailto:williamhuyett@sbcglobal.net)

### **EXPERIENCE:**

2013—Present	Consultant, McPherson & Jacobson, L.L.C. Omaha, Nebraska
2008—2012	Superintendent, Berkeley Unified School District Berkeley, California
2000—2008	Superintendent, Lodi Unified School District Lodi, California
1996—2000	Superintendent, Dixon Unified School District Dixon, California
1992—1996	Assistant Superintendent for Secondary Education, Elk Grove Unified School District, Elk Grove, California
1998—1992	Principal, Florin High School Elk Grove Unified School District, Elk Grove, California
1984—1988	Principal, Elk Grove High School Elk Grove Unified School District, Elk Grove, California
1982—1984	Principal, James Rutter Middle School Elk Grove Unified School District, Elk Grove, California
1978—1982	Vice Principal/ Administrative Assistant, Elk Grove High School Elk Grove Unified School District, Elk Grove, California
1974—1978	Mathematics and Physics Teacher, Elk Grove High School Elk Grove Unified School District, Elk Grove, California

**EDUCATION:**

- University of Virginia, B. S., Mechanical Engineering, Graduated with Distinction
- University of Virginia, M.A.T., Math Education
- California State University, Sacramento, Administrative Credential

**ADDITIONAL TRAINING**

- Trained as a Teacher Expectation Student Achievement (TESA) Presenter
- CLAD Training, teaching strategies for bilingual children
- Beyond Diversity Training, Pacific Education Group
- ACSA Academies; Curriculum and Instruction, Superintendent
- ASCD High School Futures Consortium, represented Florin High School as one of twenty-six high schools in the nation to examine curriculum, instruction, organization and technology
- Western Association of Schools and Colleges visiting chair training for high school accreditation

**PROFESSIONAL CONTRIBUTION:**

- California High School Task Force, “Second to None”, Chair of the Curriculum Committee
- National Workshop Presenter for ASCD on Restructuring the High School
- WASC Advisory Committee Chair for development of “Focus on Learning” accreditation model
- ACSA Superintendent Academy Faculty
- Secretary/Treasurer Northern California Superintendents Association



## **Ben Johnson II**

BenJohnson2nd@gmail.com  
11307 Estates Court  
Riverside, CA 92503  
Cell: (951) 316-9615

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### **SENIOR LEADERSHIP**

Top-producing sales leader with dynamic career history of directing field sales and corporate training initiatives to drive market share growth for Fortune 500 pharmaceutical innovator. Solid leadership abilities, expertly employed in aligning marketing strategies with creative solutions to continuously fine-tune training programs for maximum effectiveness. Articulate communicator, adept in cultivating strategic relationships, identifying opportunities, and managing complex negotiations for profitable outcomes.

- High-performance track record of successfully turning around underperforming sales teams to surpass targeted goals for award-winning results including turning around a team ranked 44/55 to 11/55 in one-year.
- Successfully managed eight representatives that won President's Club, three promoted to managers, eight promoted to specialty roles and eighteen promoted within the career sales ladder.
- Proven ability to mentor, and motivate teams of 8-13 (average of 10) associates within small and multi-state markets.
- Decisive proactive manager, adept in market analysis, coordination of resources, and budget administration, leading individuals and teams to successful achievement of objectives.
- Regional recruiting & staffing specialist, experienced at attracting top-talent, and retaining through individualized career development

### **AREAS OF EXPERTISE**

Strategic Planning • New Business Development • Parallel Project Management • Market Expansion  
• Product Positioning • Client Relations • Territory Management • Consultative Sales  
• Proposal Development  
Persuasive Presentations • Sophisticated Negotiations • Account Management & Expansion  
• Special Events  
Recruiting • Interviewing • Team Building & Leadership • Sales Training & Development  
• Staff Management

### **PROFESSIONAL EXPERIENCE**

#### **The Audit Group**

*Vice-President of Business Development*

July 2014-Present

**MEDASSETS**

August 2013-July 2014

***Regional Vice-President (Spend & Clinical Management)***

**WORKFLOW ONE** Ontario, CA

March 2011- Aug. 2013

**Director of Healthcare-West**

**Regional Sales Manager**

**PACIFICORD BIO-TECH** Irvine, CA

June 2010-Dec 2010

**Regional Sales Manager (Field Sales, Customer Service Team & Health Educators)**

**SANOFI-AVENTIS U.S.**, Bridgewater, NJ

Sept 89 – June 2010

**District Sales Manager (12/97-6/10) Field Sales Trainer (1/95-11/97) Senior Sales/Institutional Sales (3/93-12/95) Sales Representative (9/89-2/93)**

**COMMUNITY SERVICE**

**Vice-President Alvord Board of Education (Alvord Unified School District)**  
(Dec 95-Present)

Elected to five (four year terms) times to the Alvord Unified School District Board of Trustees.

**Board of Directors (Riverside Community Health Foundation)** (Jan 07-Present)

**Parkview Community Hospital Advisory Committee** (Feb 2012-Present)

**ACHE Vice-Chairman Inland Empire Chapter**

**HMFA Member**

**WSHMAA** Western States Healthcare Materials Management Association

**CAHPMM** California Association of Healthcare Purchasing and Material Management

**Advisory Board Sigma Alpha Epsilon Alumni Association** (Aug 1993-Present)

**EDUCATION AND CREDENTIALS**

**Bachelor of Arts in Psychology**

UNIVERSITY OF CALIFORNIA, Irvine, CA

***Professional Development***

Situational Leadership 2015

DISC Leadership Training 2014

Mastering the Complex Sale 2014

Sales Force.Com Training-2010

Integrity Selling-2009

Creating Customer Value • Change Leadership – 2008

Coaching for Impact • Competitive Selling Through Advanced Demonstration – 2007

Managing Engagement for Business Results: Emotional Intelligence – 2007

Symphony • Target Selection Interviewing • P3 Coaching • Working with Territory  
Counterparts – 2006

## *California Consultants*

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

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

**Ms. Aida Buelna-Valenzuela**  
Retired Superintendent  
Woodland, California

**Mr. Robert Challinor**  
Retired Superintendent  
Victorville, California

**Mr. Robert Ferguson**  
Retired Superintendent  
Napa, California

**Dr. Donald Helms**  
Retired Superintendent  
Placerville, California

**Dr. Molly Helms**  
Retired Superintendent  
Placerville, California

**Mr. William Huyett**  
Retired Superintendent  
Lodi, California

**Mr. Benjamin Johnson, II**  
Board Member  
Riverside, California

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

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

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

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

**Mr. Edward Velasquez**  
Retired Superintendent  
Chino, California

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

**Dr. Thomas Jacobson, CEO/Owner**  
McPherson & Jacobson, L.L.C.  
Omaha, Nebraska

**Dr. Steve Joel, National Recruiter**  
Superintendent  
Lincoln, Nebraska



## ***Transparency—The McPherson & Jacobson Difference***

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process. The openness of the process has not gone unnoticed. The following article discusses McPherson & Jacobson's stakeholder involvement.

### **Report details what community members want in new Elk Grove district superintendent**

Residents, teachers and students in the Elk Grove Unified School District are all looking for the same characteristics in a new superintendent, according to report from McPherson & Jacobson LLC, an executive search firm hired by the district.

They want someone who is collaborative, culturally competent, approachable, has integrity and strong communication skills and is visible at schools. They also want someone who can lobby for legislation, policy and resources at the state and federal level, according to the report.

...

The report, compiled from more than 20 meetings with community members and stakeholders, was distributed to board members and others at a school board workshop Wednesday afternoon.

"It's a good process – to get a feel for the community, employees and students," said board President Priscilla Cox.

The report also says that stakeholders are in sync about issues at the district that they would like a new superintendent to know about. They list the achievement gap at the top of their list of concerns, as well as institutional racism and equity in the distribution of resources between schools.

They want the new superintendent to know that there is a split on the school board that makes it difficult for staff to work with trustees and that there is a need to re-establish trust between the administration and staff, according to the report.

The report will be used to help select a superintendent and will be distributed to the candidates so they can understand the community's needs, said Bob Ferguson, a consultant for McPherson and Jacobson LLC. The new superintendent also will receive a copy as a guide to taking the helm of the district.

The process is very effective, said William Huyett, a consultant for McPherson and Jacobson. By the third or fourth meeting, common themes began to emerge.

“It’s a healthy thing to talk to your stakeholders and to find out what the issues are,” Huyett said.

The school board adjourned to a closed session with the expectation that it would identify finalists for interviews that will begin Friday.

...

The entire board will conduct formal interviews of candidates in closed sessions. Interviews could continue Monday if the board selects more than four finalists. Representatives of employee, district and community organizations have also been selected to participate in the interviews.

**Taken in part from Lambert, Diana, *Sacramento Bee*,  
Wednesday, Sep. 3, 2014 - 9:30 pm**

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

### BOARD OF EDUCATION

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

### SUPERINTENDENT

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

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

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

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

Betsy Connolly DVM

June 3, 2014

To Whom It May Concern:

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

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

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

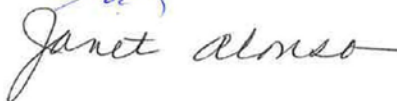
Sincerely,

Winship-Robbins Elementary School Board

Hassan Mohsen, President



Janet Alonso, Clerk





## ***Applicant Diversity***

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

Over 25 percent of McPherson & Jacobson consultants are minorities or female. We use our consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants.

McPherson & Jacobson has placed numerous minority/female candidates; our most recent placements are listed below:

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

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