



SACRAMENTO CITY UNIFIED SCHOOL DISTRICT BOARD OF EDUCATION

Agenda Item# 11.3

Meeting Date: November 2, 2023

Subject: Superintendent Search Firm Presentation and Approval

- Information Item Only
- Approval on Consent Agenda
- Conference (for discussion only)
- Conference/First Reading (Action Anticipated: _____)
- Conference/Action
- Action
- Public Hearing

Division: Board of Education

Recommendation: Receive information from respondent search firms and possible approval of firm to assist with Superintendent search process.

Background/Rationale: The Board of Education is seeking the services of a qualified firm with expertise in all phases of the Superintendent search process. Accordingly, a Request for Statement of Qualifications (RFQ) for a search consultant was issued with a submittal deadline of August 8, 2023. The scope of services shall include the Board's desire for community engagement and transparency in the Superintendent search process. Once a firm is selected a consultant contract will come back to the Board for approval.

Financial Considerations: To be determined.

LCAP Goal(s): N/A

Documents Attached:
Proposals received by firms

Estimated Time of Presentation: 10 minutes

Submitted by: Chinua Rhodes, Board President

Approved by: Lisa Allen, Interim Superintendent

A Proposal Prepared for

Sacramento City Unified School District

Sacramento, California

for

*The Search and Selection of a
Superintendent of Schools*

submitted in collaboration with



by

MCPHERSON *MJ* JACOBSON, LLC
EXECUTIVE RECRUITMENT & DEVELOPMENT



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



MCPHERSON & JACOBSON, L.L.C.

Executive Recruitment & Development
in collaboration with the California School Boards Association



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

PART I – COVER LETTER

August 7, 2023

Board of Trustees
Sacramento City Unified School District
5735 47th Avenue
Sacramento, California 95824

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. intends to provide Sacramento City Unified School District in ensuring your superintendent search secures quality leadership for the district.

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

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

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

Our contact information:

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

McPherson & Jacobson, L.L.C.
11725 Arbor St., Suite 220
Omaha, Nebraska 68144
Telephone: 402-991-7031/888-375-4814
Fax: 402-991-7168
Email: mail@macnjake.com

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

Sincerely,

Dr. Norm Ridder, by A. Coleman
Dr. Norm Ridder
Owner, McPherson & Jacobson L.L.C.

PART II – TABLE OF CONTENTS

PART III – BACKGROUND AND EXPERIENCE	3
<i>Executive Summary</i>	3
<i>About McPherson & Jacobson</i>	4
<i>The McPherson & Jacobson Difference</i>	4
<i>Qualifications and Background of McPherson & Jacobson, L.L.C.</i>	4
<i>McPherson & Jacobson, L.L.C. Non-Discrimination Policy</i>	5
<i>Applicant Diversity</i>	6
<i>Selected References</i>	6
<i>Consultants for Search</i>	8
<i>Educational Background</i>	16
PART IV – STATEMENT OF WORK/ACTION PLAN	21
<i>Five Phases of a Superintendent Search</i>	21
<i>Phase I—Initiating the Search Process</i>	22
<i>Phase II—Stakeholder Input, Advertising the Position, Recruiting Applicants</i>	22
<i>Phase III—Applicant Screening</i>	24
<i>Phase IV—Reviewing Candidates with the Board, Interviews</i>	25
<i>Phase V—Transition with Success</i>	27
<i>Timeline</i>	28
<i>Responsibilities of Sacramento City Unified School District and McPherson & Jacobson, L.L.C.</i>	29
<i>Stakeholder Involvement</i>	32
PART V – RFP PRICE FORM	34
<i>Cost Proposal Sacramento City Unified School District</i>	35
<i>Price Breakdown for Search Activities</i>	36
<i>Additional Services Available</i>	36
<i>McPherson & Jacobson Guarantees</i>	37
<i>Client Satisfaction</i>	37
<i>Price Match</i>	37
<i>Recruiting the Selected Candidate</i>	37
PART VI – NON-COLLUSION DECLARATION	38
PART VII – ADDENDA FORM	39
<i>Additional Information</i>	40

California Consultants 40
California Searches Conducted by McPherson & Jacobson, L.L.C...... 41
Transparency—The McPherson & Jacobson Difference..... 46
What Board Members Say About the Service of McPherson & Jacobson, L.L.C...... 48

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

08/23

PART III – BACKGROUND AND EXPERIENCE

Our contact information:

McPherson & Jacobson, L.L.C.
11725 Arbor St., Suite 220
Omaha, Nebraska 68144
Telephone: 402-991-7031/888-375-4814
Fax: 402-991-7168
Email: mail@macnjake.com

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.

About McPherson & Jacobson

The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process.

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

California School Board Association Search Service

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 1,000 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 130 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including

current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

Sustainability in Leadership

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

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

McPherson & Jacobson, L.L.C. Non-Discrimination Policy

McPherson & Jacobson, L.L.C. is dedicated to serving school districts by supporting all candidates regardless of cultural and ethnic diversity

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

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

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

Applicant Diversity

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

McPherson & Jacobson has **over 130 consultants** across the nation. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

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

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

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

Selected References

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 916-204-3518

Search Year: 2014/15

Enrollment: 62,000

San Bernardino City Unified School District

777 North F St.

San Bernardino CA 92410

School Phone: 909-381-1100

School District Contact: Katrin Balintag 909-381-1240

Board Contact: Dr. Scott Wyatt 909-202-9518

Search Year: 2022/23

Enrollment: 48,755

Stockton Unified School District

56 South Lincoln Street

Stockton CA 95203

School Phone: 209-933-7000

School District Contact: Christina Alejo 209-933-7070, Ext. 6407

Board Contact: AngelAnn Flores 209-645-9644

Search Year: 2022/23

Enrollment: 33,000

Hacienda La Puente Unified School District

15959 E. Gale Ave.

City of Industry CA 91745

School Phone: 626-933-1000

School District Contact: Nancy Ruiz

Board Contact: Anthony Duarte 626-664-5472

Search Year: 2019/20

Enrollment: 22,000

Hayward Unified School District

24411 Amador Street

Hayward CA 94544

School Phone: 510-784-2600

School District Contact: Jenna Rodrigues 510 784-2688

Board Contact: Dr. April Oquenda

Search Year: 2021/22

Enrollment: 19,000

Consultants for Search

Mr. William Huyett – Lead Consultant



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

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

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

Newcastle Elementary School District
Sausalito Marin City School District
Sonora Union High School District
Albany Unified School District
San Carlos School District
New Haven Unified School District
Parlier Unified School District
Alisal Union School District
New Haven Unified School District
Newark Unified School District
Nevada Joint Union High School District
Berkeley Unified School District--
Executive Director for Special Education
Elk Grove Unified School District
Glendale Unified School District
Parlier Unified School District
Vallejo City Unified School District

Washington Unified School District
San Mateo-Foster City School District
Old Adobe Union School District
Red Bluff Joint Union High School
District
Paso Robles Joint Unified School District
Central Unified School District
Davis Joint Unified School District
Hayward Unified School District
Mount Shasta Union School District
Siskiyou Union High School District
Winters Joint Unified School District
Natomas Unified School District
Newcastle Elementary School District
Rancho Santa Fe School District
Riverbank Unified School District
Stockton Unified School District

Dr. Steve Lowder



Dr. Steven Lowder joined McPherson & Jacobson in 2014. He became a Regional Director in 2022.

He has spent more than 30 years as a public school administrator including serving as a Superintendent in Idaho, Oregon, and California. In 2014 he retired as the Superintendent of Stockton Unified School District in Stockton, California.

Dr. Lowder has a Bachelors, and Master's degree from Humboldt State University, in Arcata, California. He earned his Doctorate in 1992 at the University of Southern California in Los Angeles, California.

Dr. Lowder has led or assisted in numerous superintendent searches including: Reynolds School District, Fairview, Oregon; Springfield Public Schools, Oregon; Bend-La Pine Schools, Oregon; North Bend School District, Oregon; North Wasco County School District, The Dalles, Oregon; North River School District, Cosmopolis, Washington; Kalama Schools, Washington; Valdez City Schools, Alaska; Camas School District, Washington; Kenai Peninsula Borough School District, Soldotna, Alaska; Vancouver Public Schools, Washington; Winston-Dillard School District, Oregon; Greater Albany Public Schools, Oregon; Issaquah School District 411, Washington; Kent School District, Washington; Oregon City School District, Oregon; Compass Charter Schools, California; Copper River School District, Alaska; Hillsboro School District 1J, Oregon; Kenaitze Indian Tribe - Education Director, Kenai, Alaska; Portland Public Schools -Deputy Supt. of Business and Operations, Oregon; Portland Public Schools – Chief Financial Officer, Oregon; San Bernardino City Unified School District, California; South Monterey County Joint Union High School District, California; Wenatchee School District, Washington.

Ms. Aida Buelna



Ms. Aida Buelna-Valenzuela joined McPherson & Jacobson in 2015. She spent thirty-six years in public education as a teacher, site and district level administrator. She served her last eight years as a superintendent in the Esparto Unified School District in California.

Ms. Buelna-Valenzuela is an Emeritus Member of the Association of California School Administrators where she served as the Chair for Small School District Superintendents and an Emeritus Member of the California Association of Latino School Administrators.

Ms. Buelna-Valenzuela has a Baccalaureate Degree from California State University, Fresno, a Master's Degree from California State University Sacramento.

William Huyett
Email: b_huyett@macnjake.com
Phone: 209-334-3375

Educational Background

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

Professional Experience

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

Professional Organization Memberships

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

Dr. Steven Lowder
Vancouver, WA 98685
Email: s_lowder@macnjake.com
Phone: 951-719-6551

Educational Background

Ed.D.	1992	University of S. California	Educational Policy, Planning, and Admin.
M.A.	1985	Humboldt State University	Educational Supervision Emphasis
B.A.	1975	Humboldt State University	Liberal Studies: Math/Science Emphasis

Professional Experience

Dates		Title	District	Location	Enrollment
2014	to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2012	to 2014	Superintendent	Stockton Unified School District	Stockton, CA	39,000
2010	to 2012	Superintendent	Hemet Unified School District	Hemet, CA	22,000
2005	to 2010	Superintendent	Lincoln Unified School District	Stockton, CA	8,000
2000	to 2005	Superintendent	Tigard-Tualatin School District 23J	Tigard, OR	12,000
1998	to 2000	Assistant Superintendent	Meridian Joint School District #2	Meridian, ID	30,000
1995	to 1998	Superintendent	McCall-Donnelly Joint School District #421	McCall, ID	1,000
1995	to 1998	Superintendent	Meadows Valley School District #11	Meadows Valley, ID	200
1985	to 1995	Superintendent	Rio Dell Elem. School District	Rio Dell, CA	200
1980	to 1985	Superintendent/ Principal	Cuddeback Union Elem. School District	Carlotta, CA	100
1978	to 1980	Chief District Admin./Teacher	Millville School District	Millville, CA	200
1977	to 1978	Vice-Principal/ Teacher	Millville School District	Millville, CA	200

Aida Buelna-Valenzuela

Woodland, CA 95695

Email: a_buelna-valenzeula@macnjake.com

Phone: 530-666-4117

Educational Background

Prof. Admin. Services Credential	1991	California State University	
M.A.	1989	California State University	Teacher Ed.
Bilingual/Bicultural Specialist Credential	1983	California State University	
Ryan Multiple Subject Credential	1979	California State University	
B.A.	1978	California State University	Liberal Studies

Professional Experience

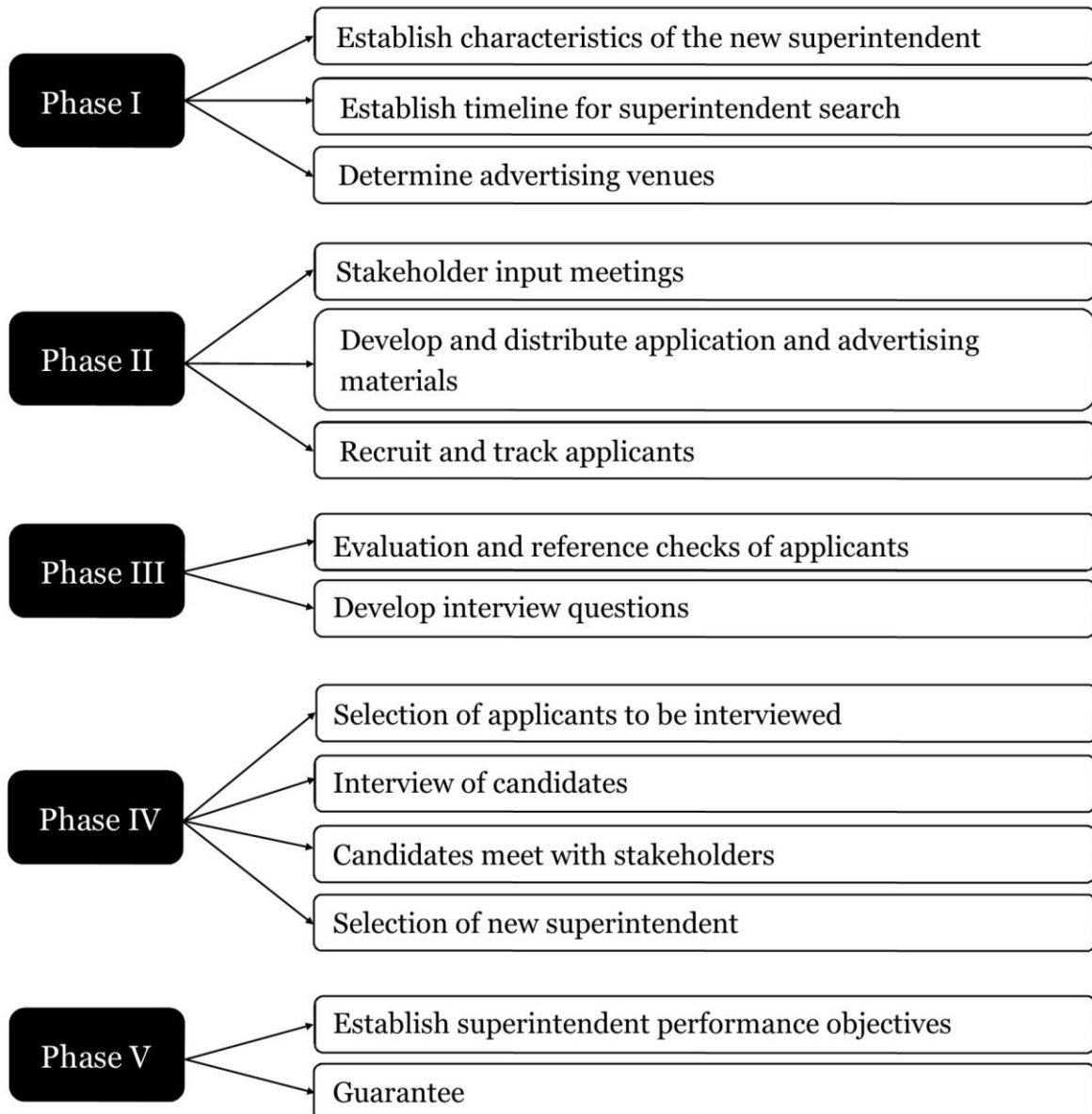
Dates	Title	District	Location
2015 to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE
2007 to 2015	Superintendent	Esparto Unified School District	Esparto, CA
2005 to 2007	Administrator, Child Development	Sacramento City Unified School District	Sacramento, CA
1995 to 2005	Director of School Improvement	Woodland Joint Unified School District	Woodland, CA
1997 to 1998	Visiting Educator	California State Department of Education	CA
1993 to 1995	Elementary Principal	Rio Lunda School District	Rio Lunda, CA
1989 to 1993	Vice Principal	Woodland Joint Unified School District	Woodland, C A
1987 to 1989	District Bilingual Coordinator		
1983 to 1987	Bilingual Elementary Teacher	Woodland Joint Unified School District	Woodland, CA
1980 to 1983	Bilingual Elementary Teacher	Washington Unified School District	Sacramento, CA
1979 to 1980	High School Bilingual Math Teacher	Delano Union High School District	Delano, CA

Professional Recognition/Awards

Date	Name of Award	Awarding Organization, Committee, etc.	State
2013	Superintendent of the Year	Region III ACSA	CA
2013	Pilar Andrade Service Award	Yolo County Concilo	CA
2012	Administrator of the Year	FFA	
2012	Round Table Administrator	Texas A & M	TX

PART IV – STATEMENT OF WORK/ACTION PLAN

Five Phases of a Superintendent Search



Phase I—Initiating the Search Process

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

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

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

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

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

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

- ✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

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

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

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

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

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

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

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

K12 *Insight* will analyze the input received during the in-person sessions and from the online input survey.

The results of the stakeholder meetings, online stakeholder input, and the K12 *Insight* analysis will be summarized into a report and presented to the board.

✓ **Develop promotional literature and brochures announcing the vacancy (*optional—there is an additional fee for a full-color brochure*).**

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

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

McPherson & Jacobson's staff will prepare and place the announcement of vacancy. It will be sent to the state school board and administrator associations, as well as media venues selected by the board. Additionally, McPherson & Jacobson maintains an interactive website (www.macnjake.com) that allows applicants to access all the application materials and apply online. The website averages over 225,000 hits per month.

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

Phase III—Applicant Screening

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

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

✓ **Conduct reference checks.**

We understand that applicants do not submit references who will not speak highly of them. We begin with the references given and ask them a list of questions relevant to the

selection criteria. After asking those questions, we ask each reference to give us the names of other people who can speak of the applicant's qualifications. We then call those individuals and ask them the same set of questions, including asking them to give us the names of other people who can speak of the applicant's qualifications. We go a minimum of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

Phase IV—Reviewing Candidates with the Board, Interviews

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

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

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

✓ **Conduct background checks.**

Included in the expenses are a criminal/financial/degree verification background checks for the candidates selected to be interviewed.

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

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

If the board chooses to conduct semi-finalist interviews, the candidates will only meet with the board. The names of the semi-finalist candidates will remain confidential (in

states where an executive session is allowed), and stakeholders will not meet the semi-finalists. The finalist interviews will be conducted as described in the paragraph above.

✓ **Coordinate interview and visitation procedures.**

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

If the board chooses to involve stakeholder groups in the interview process, the consultants will assist in establishing the finalist interview schedule that includes district staff, students, and community groups. A typical interview day will include a tour of the district and community, meeting with stakeholder groups, and a formal interview with the board.

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

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

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

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

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

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

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

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

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

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

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

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

Phase V—Transition with Success

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

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

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

The superintendent will take the information generated from this session and develop an action plan for achieving the performance objectives.

✓ **Provide a guarantee.**

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

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

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.

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

- At the beginning of the search (**mid-August 2023**)
 - The qualities for the new superintendent are identified
 - A formal timeline is established
 - Advertising decisions are made
 - Application information is posted
 - A brochure is created to advertise the district and the vacancy

- At the time designated by the board (**September 2023**)
 - Stakeholder group meetings are held
 - A summary of stakeholder input is presented to the board

- As applications arrive in our office
 - Applications are monitored and applicants are notified of the deadlines to submit their materials

- After the closing date (**late October 2023**)
 - All the completed applicant files are forwarded to the consultants
 - The consultants begin the review and pre-interview process

- Approximately two to four weeks after the closing date (**mid-November**)
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles and video interviews of qualified candidates to the board
 - The board selects the candidates it wants to interview
 - Criminal/financial/degree verification background checks are conducted on the candidates selected to be interviewed
 - McPherson & Jacobson notifies each applicant not selected for an interview

- Soon after the board selects their candidates (**early December 2023**)
 - Semi-finalist interviews are conducted (if chosen by the board)
 - The board interviews its final candidates
 - The board selects their new superintendent
 - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status
 - Superintendent start date (**January 1, 2024, but may be later**)

*Responsibilities of Sacramento City Unified School District
and McPherson & Jacobson, L.L.C.*

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

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

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

Stakeholder Involvement

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 1,000 superintendent searches for school districts ranging from 10 to over 300,000 students. For each search, we have coordinated stakeholder input sessions. Besides meeting with stakeholder groups designated by the board, an online input survey is also available for those who cannot attend the meetings. After the meetings have been completed, the board will receive a written report with the findings of the meetings and online input.

Initial stakeholder input sessions

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

Meeting the candidates

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

Process for Obtaining Staff Input

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

Our normal protocol is to host meetings for the teachers and classified staff in the afternoon, right after school dismissal to give the maximum opportunity for the staff to participate. Central office and building administrator meetings are scheduled at multiple locations to maximize the opportunities for their input. Student input sessions are not scheduled during class time, they are normally held during lunch breaks.

Process for Obtaining Parent and Community Input

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

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

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

Process for Including Ethnically Diverse Communities

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

Process for Obtaining Online Stakeholder Input

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

PART V – RFP PRICE FORM

REQUEST FOR PROPOSAL PRICE FORM

Sacramento City Unified School District
5735 47TH Avenue
Sacramento, CA 95824

RE: Request for Proposal – Superintendent Search

Dear Members of the Board of Trustees:

The undersigned, doing business under the firm name of McPherson + Jacobson, LLC, having carefully examined the Notice to Proposers, the Instructions, and the Specifications for the proposed Superintendent Search, proposes to perform the contract, including all of its component parts, and to furnish all services, and taxes called for by them for the entire order, as follows:

Amount of proposal (Fee) \$39,500
Not to Exceed Amount \$56,010

SUBMITTED BY:

McPherson + Jacobson, LLC
COMPANY

11725 Arbor Street, Ste. 220 Omaha, Nebraska 68144
ADDRESS CITY/STATE/ZIP


SIGNATURE Dr. Norm Ridder
PLEASE TYPE OR PRINT NAME

Owner / CEO July 26, 2023
TITLE DATE

(402) 991-7031 / 888-375-4814
PHONE

Cost Proposal Sacramento City Unified School District

The fee for conducting the superintendent search is \$39,500 for Phases I-V.

Estimated Expenses **\$16,510**

- **Advertising**
 - Four (4) weeks of print advertising in EdCal (40-word ad)
 - Sixty (60) days of advertising on EdJoin
 - Six (6) weeks of advertising on ALAS (Association of Latino Administrators & Superintendents)
 - Thirty (30) days of advertising on NABSE (National Alliance of Black School Educators)
 - One (1) posting on CALSA (California Association of Latino Superintendents & Administrators)
 - *Expenses may increase if additional advertising or alternative advertising venues are chosen.*

- **Stakeholder Meetings**
 - Four (4) consecutive days of in-person stakeholder meetings
 - Online stakeholder input surveys
 - Final report delivered to the board by email and one hard copy per board member, if requested
 - *If the district requests additional stakeholder input days, there will be an additional fee (negotiated between the district and the consultants) and additional expenses.*
 - *Depending on the languages selected for the surveys, there may be an additional fee charged for translating the results of the survey.*

- **Candidate Reviews/Information**
 - Video interviews of candidates (five (5) video interviews are included in the not to exceed amount)
 - Criminal/financial/credential verification background check for candidates chosen by the board for interviews (four (4) background checks are included in the not to exceed amount)
 - Assist in scheduling an on-site visitation to the finalist's home district (at the district's request).

- **Consultant Travel**
 - Travel expenses for consultants for scheduled trips to the school district (initial meeting with the board, stakeholder meetings, meeting to discuss the stakeholder input, meeting to present candidates to the board).
 - *Consultant travel expenses can be reduced if the district requests online meetings.*

- **Office Expenses**

The total not to exceed amount including expenses is \$56,010.

Interview expenses for the candidates are not included in this amount.

Price Breakdown for Search Activities

Phase	Description of Services	Fee	Expenses
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$9,250	\$3,965
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$9,500	\$9,665
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$9,500	\$ 300
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.	\$9,250	\$1,615
V	Meet with the board to determine the superintendent performance objectives.	\$2,000	\$ 965
Totals		\$39,500	\$16,510
	Total (including consultant travel for scheduled trips to the district)	\$56,010	

Additional Services Available

- **K12 Insight Stakeholder Input (included in price)**

K12 *Insight* will analyze the input received during the in-person sessions and from their online input survey. The results of the stakeholder meetings, online stakeholder input, and the K12 *Insight* analysis will be summarized into a report and presented to the board.

- **Creating a Brochure for the Vacancy**

If the board requests, McPherson & Jacobson will prepare a full-color two or four-page brochure to advertise the vacancy. The fees are \$250 for a two-page brochure and \$500 for a four-page brochure. The information for the brochure needs to be provided to the firm no later than three weeks prior to the closing date for applications.

- **Personality/Strengths Assessments Option**

If the board requests, personality strength tests can be completed for the candidates. Birkman International Signature Reports can be obtained for the candidates the district chooses to interview. The estimated fee for this service is \$700 per candidate.

- **Assistance in Hiring the Selected Candidate**

The fee will be based on an hourly negotiated rate.

- 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.

McPherson & Jacobson Guarantees

Client Satisfaction

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.

If the board chooses to use our complete service, we will guarantee our process for **two (2) years**. If the person selected leaves the position, for whatever reason, within the guarantee period, we will repeat the process at no charge except actual expenses. *The guarantee is valid only if the board is comprised of a majority of the members who hired the superintendent (exceptions would be considered in situations of a placement's personal or family reasons for leaving).*

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.

Price Match

McPherson & Jacobson, L.L.C. will match the search fee for a comparable level of services provided by the competitive bid.

Recruiting the Selected Candidate

McPherson & Jacobson consultants do not actively recruit administrators that have been placed in our searches. We would not have the retention rates for our placements if we recruited the administrators from our searches. Over the last five years, **over eighty-five percent** of administrators are in the position for which they were hired. **Almost sixty percent** of administrators are still in the position for which they were hired within the past ten years. **Forty percent** of the administrators selected by governing boards within the past 15 years continue in the position for which they were hired.

PART VI – NON-COLLUSION DECLARATION

NON-COLLUSION DECLARATION

State of ~~California~~ ^{Nebraska})
) ss.
County of Douglas)

I, Dr. Norm Ridder, being duly sworn, declare that I am Owner / CEO of McPherson + Jacobson LLC, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his/her/their proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this 26th day of July, 2023 at Omaha ~~California~~ ^{Nebraska}

Dr. Norm Ridder, by AC
Signature

Dr. Norm Ridder, by Amy Coleman

PART VII – ADDENDA FORM

ADDENDA

The undersigned acknowledges receipt of the following addenda and the cost, if any, of such revisions has been included in the Lump Sum Grand Total of your proposal.


Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Name of Proposer McPherson + Jacobson LLC



Additional Information

California Consultants

Mrs. Nicole Anderson, Educational Consultant, Vallejo
Mr. James Bates, Retired Superintendent, Bakersfield
Dr. Michele Bowers, Retired Superintendent, Lancaster
Ms. Aida Buelna, Retired Superintendent, Woodland
Dr. Adam Clark, Superintendent, Mt. Diablo USD, Concord
Dr. Sonny Da Marto, Retired Superintendent, Folsom
Dr. Penelope DeLeon, Former Superintendent, Fontana
Dr. Reyes Gauna, Retired Superintendent, Lodi
Dr. Shelley Jones-Holt, Educational Consultant, Sacramento
Dr. Michele Huntoon, Superintendent, Aromas-San Juan School District
Mr. William Huyett, Retired Superintendent, Lodi
Mr. Benjamin “Ben” Johnson II, Former Board Member, Riverside
Dr. Steven Lowder, Retired Superintendent, Stockton
Dr. Michael McCoy, Retired Superintendent, Bakersfield
Dr. Daniel Moirao, Retired Superintendent, Danville
Mr. Daniel Moore, Superintendent, Linden
Ms. Suzanne Morey, Retired Administrator, Laguna Beach
Dr. Stanley Munro, Administrator, Fresno USD, Clovis
Mr. Dennis Murray, Retired Superintendent, Folsom
Dr. Marilyn Shepherd, Retired Superintendent, Friant
Mr. Daniel Zeisler, Retired Superintendent, Chicago Park ESD, Grass Valley

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

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

Alisal Union School District, Salinas
Search Year: 2015/16, Enrollment: 9,000
Search Year: 2019/20, Enrollment: 9,000

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

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

**Association of California School Administrators (ACSA)—Sr. Director of Diversity,
Equity and Inclusion, Sacramento**
Search Year: 2022/23

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

Berkeley Unified School District—Executive Director for Special Education, Berkeley
Search Year: 2017/18, Enrollment: 10,000

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

Central Unified School District, Fresno
Search Year: 2021/22, Enrollment: 15,000

Central Union High School District, El Centro
Search Year: 2021/22, Enrollment: 4,116

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

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

Davis Joint Unified School District, Davis
Search Year: 2021/22, Enrollment: 8,300

**Davis Joint Unified School District—Associate Superintendent for Instructional
Services, Davis**
Search Year: 2022/23, Enrollment: 8,300

**Del Norte Unified School District—Executive Director of Special Education,
Crescent City**
Search Year: 2022/23, Enrollment: 3,600

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

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

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

Evergreen Elementary School District, Elk Grove
Search Year: 2021/22, Enrollment: 9,260

Fallbrook Union High School District, Fallbrook
Search Year: 2013/14, Enrollment: 2,600
Search Year: 2018/19, Enrollment: 2,200

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

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

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

Gonzales Unified School District, Madera
Search Year: 2021/22, Enrollment: 2,000

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

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

Hacienda La Puente Unified School District, City of Industry
Search Year: 2019/20, Enrollment: 22,000

Hayward Unified School District, Hayward
Search Year: 2021/22, Enrollment: 19,000

Hemet Unified School District, Hemet,
Search Year: 2015/16, Enrollment: 21,000

Johnstonville Elementary School District, Susanville
Search Year: 2015/16, Enrollment: 205

Lakeside Union School District, Bakersfield
Search Year: 2014/15, Enrollment: 1,310

Linden Unified School District, Linden
Search Year: 2020/21, Enrollment: 2,300

Mark Twain Union Elementary School District, Angels Camp
Search Year: 2022/23, Enrollment: 736

Merced City School District, Merced

Search Year: 2022/23, Enrollment: 11,000

Mount Shasta Union School District, Mt. Shasta

Search Year: 2021/22, Enrollment: 534

Nevada Joint Union High School District, Grass Valley

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

New Haven Unified School District, Union City

Search Year: 2016/17, Enrollment: 12,148

Search Year: 2018/19, Enrollment: 12,000

Newark Unified School District, Newark

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

Newcastle Elementary School District, Newcastle

Search Year: 2014/15, Enrollment: 796

Search Year: 2022/23, Enrollment: 398

Oakley Union Elementary School District, Oakely

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

Old Adobe Union School District, Petaluma

Search Year: 2013/14, Enrollment: 1,700

Search Year: 2019/20, Enrollment: 1,950

Oxnard Union High School District, Oxnard

Search Year: 2015/16, Enrollment: 16,500

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

Pacifica School District, Pacifica

Search Year: 2022/23, Enrollment: 3,000

Parlier Unified School District, Parlier

Search Year: 2017/18, Enrollment: 3,435

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

Paso Robles Joint Unified School District, Paso Robles

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

Penn Valley Union Elementary School District, Penn Valley

Search Year: 2014/15, Enrollment: 700

Piner-Olivet Union School District, Santa Rosa

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

Pollock Pines Elementary School District, Pollock Pines

Search Year: 2015/16, Enrollment: 800

Rancho Santa Fe School District, Rancho Santa Fe

Search Year: 2022/23, Enrollment: 581

Red Bluff Joint Union High School District, Red Bluff

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

Richland School District, Shafter

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

Riverbank Unified School District, Riverbank

Search Year: 2022/23, Enrollment: 2,400

Roseville Joint Union High School District, Roseville

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

San Bernadino City School District, San Bernadino

Search Year: 2022/23, Enrollment: 48,700

San Carlos School District, San Carlos

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

San Mateo-Foster City School District, Foster City

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

Santa Barbara Unified School District, Santa Barbara

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

Santa Barbara Unified School District—Chief Technology Officer, Santa Barbara

Search Year: 2021/22, Enrollment: 15,000

Santa Paula Unifued School District, Santa Paula

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

Santa Ynez Valley Union High School District, Santa Ynez

Search Year: 2020/21, Enrollment: 850

Saugus Union School District, Santa Clarita

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

Sausalito Marin City School District, Marin City

Search Year: 2015/16, Enrollment: 524

Search Year: 2022/23, Enrollment: 415

Sierra-Plumas Unified School District, Loyalton

Search Year: 2022/23, Enrollment: 400

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

Search Year: 2018/19, Enrollment: 386

Siskiyou Union High School District, Mt. Shasta

Search Year: 2021/22, Enrollment: 555

Siskiyou Union High School District—High School Principal, Mt. Shasta

Search Year: 2022/23, Enrollment: 575

Soledad Unified School District, Soledad

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

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

Sonoma Valley Unified School District, Sonoma

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

Sonora Union High School District, Sonora

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

South Bay Union School District, Eureka

Search Year: 2021/22, Enrollment: 500

South Monterey County Joint Union High School District, King City

Search Year: 2022/23, Enrollment: 2,200

Stockton Unified School District, Stockton

Search Year: 2022/23, Enrollment: 33,000

Strathmore Union Elementary School District, Strathmore

Search Year: 2019/20, Enrollment: 773

Vallecito Union School District, Avery

Search Year: 2020/21, Enrollment: 600

Vallejo City Unified School District, Vallejo

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

Ventura Unified School District, Ventura

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

Washington Unified School District, West Sacramento

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

Whittier City School District, Whittier

Search Year: 2021/22, Enrollment: 6,300

Winship-Robbins Elementary School District, Meridian

Search Year: 2013/14, Enrollment: 200

Winters Joint Unifed School District, Winters

Search Year: 2021/22, Enrollment: 1,550

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.



Matt Best
Superintendent

526 B Street ♦ Davis, CA 95616 ♦ (530) 757-5300 ♦ FAX: (530) 757-5323 ♦ www.djUSD.net

To whom it may concern:

Davis Joint Unified School District had a successful search for the position of Superintendent in the Spring of 2022. Bob Ferguson and Bill Huyett of McPherson and Jacobson ensured that we had an open and public process by conducting extensive outreach to all communities. This report of community input was shared with the Board at a public meeting and helped the Davis community understand what it values in a Superintendent. At the same time, the Board was grateful for the recruitment of excellent candidates for the position. The interview process was not only informative but also personable as we got to know all the candidates. When it came to selecting a Superintendent, Bob and Bill assisted our decision with patience and sage advice. Although it started as an exercise in hiring, it turned into a reflective learning process.

Sincerely,

Thomas Adams, Ph.D.
President, Davis Joint Unified School District

From: Neil Layton <nlayton@scsdk8.org>
Date: September 17, 2022 at 4:12:32 PM PDT
To: William Huyett >
Subject: Letter of Reference

Bill:

In Fall of 2021 McPherson and Jacobson helped lead our nationwide Superintendent search. Unlike other firms, McPherson and Jacobson encouraged a community involved search that engaged all stake holders. Through the leadership of Bill Huyett and Nicole Anderson, McPherson and Jacobson held over 20 community meetings and obtained over 150 community surveys to help guide the Board in the hiring process. Additionally, McPherson managed a 14 person community interview panel to help provide direct candidate feedback to the Board. As a result of this hard work, San Carlos was able to find a visionary educational leader who has been able to have success from her first day on the job. We would not have had the same success with another firm.

Neil Layton
San Carlos School District
San Carlos, CA



Christi Barrett, Ph.D.
Superintendent

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

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

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

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

www.hemetusd.org



www.facebook.com/hemetunified



twitter.com/HemetUnified

August 13, 2020

To Whom It May Concern:

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

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

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

Sincerely,

Christi Barrett, Ph.D.
Superintendent

Comments from Santa Barbara Unified School District

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

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

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

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

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

Monday, September 19, 2022

Gregg Gunkel
343 South Old Stage Rd
Mt. Shasta, CA 96067
831-239-3470

Re: Letter of Reference for McPherson and Jacobsen, LLC

To Whom It May Concern,

Selection of a new superintendent has always been a challenging endeavor, especially given the obstacles public education has experienced in the last few years. As we entered this process with two major leaders in the district leaving their posts, I found myself thrust back into the role of board president as our existing board president stepped down due to health issues. Fortunately, our departing superintendent wisely recommended McPherson and Jacobsen as a qualified agency for superintendent selection.

William Huyett presented the agency's credentials in a manner that gave my board encouragement and newfound confidence to take on the process. Mac and Jake (as they humorously refer to themselves) did an exhaustive May campaign to identify as many qualified candidates as possible at a time when the candidate pool was quickly being depleted. Mr. Huyett skillfully guided the board through the process of reviewing and narrowing down the candidates. Even then, time and offers from other districts narrowed our list even further, causing us to fear that we would not find candidates possessing the qualities we desired. candidates would have fewer and fewer qualifications. But Mr. Huyett took extra care to help us determine which of the available candidates best met our criteria and needs.

Mac and Jake proved to be so helpful in this process, mainly by providing us with a geographically broad and experiential skills detail that gave the board confidence in the selection process. The guidance we received in setting up the multipronged screening and interview process helped us to engage a good cross section of our stakeholders, which was essential to building confidence in the district's communities. The interview design, as guided by Mr. Huyett, was deeply probing and enlightening as to who the candidates really were and how well they fit our perceived needs. Mr. Huyett constantly made himself available, helping us through final selection, contract proposal definition, and the ultimate hiring of our new superintendent.

Though not for the faint of heart, selection of a new superintendent is easily the most important selection and hiring process a district must undergo. Our district has thrived under excellent leadership; we have also suffered a few poor superintendents in the past. The outstanding guidance provided by Mr. Huyett appears to have paid off for Siskiyou Union High School District. While we are still in the "honeymoon" phase with our new superintendent, he continues on a daily basis to provide us with confidence that we made the right selection.

For all these reasons, I can highly recommend MacPherson and Jacobsen LLC and Mr. William Huyett for the difficult and most-important task of finding and securing a new superintendent.



Gregg Gunkel, Board President Siskiyou Union High School District



LINDEN

Unified School District

18527 E Main Street, Linden, CA 95236
Phone: 209-887-3894 Fax: 209-887-2250 www.lindenUSD.com



January 30, 2023

TO: MacPherson & Jacobson

RE: Letter of Reference in the Hiring Process of the Superintendent of Linden Unified School District

To whom it may concern:

This is a letter of reference for Aida Buelna and William Huyett in regard to the hiring process of our current Superintendent, Daniel Moore who was hired as superintendent for the Linden Unified School District for the 2020/21 school year. As Board President at the time, I was quite impressed with the thoroughness of the entire process. The consultants gave us highly qualified candidates with ample time to review their qualifications before the interview process. We especially enjoyed the multiple facets of having the community panel and employee panel to help ensure we had key input from influential stakeholders.

To further the vetting process, it was very helpful to have the coffee chats with all the interview candidates with two board members present at each, which allowed us to get to know them all on a more personal level, before making our final decision to hire Mr. Moore. The interview day went very smoothly due to the professionalism and organizational skills of both Ms. Beulna and Mr. Huyett. When making our final decision, it was with the expertise of Bill and Aida that helped us in making an informed decision that was best for the district.

The Board thoroughly enjoyed the entire process and appreciated all the time and effort put into it. In the future, when we are looking to hire a superintendent again (hopefully not in the near future), we would have no reservation in utilizing Aida and Bill from your organization. If you have any questions or would like more information regarding these two recruiters, please do not hesitate to email me at LUSDArea5@lindenUSD.com.

Sincerely,

Eric Nims

Eric Nims

Linden Unified School District

Board Vice President

ADMINISTRATION

Daniel Moore
Superintendent

Dr. Jamie Hughes
Assistant Superintendent

Stephen Corl
Chief Business Official

GOVERNING BOARD

Marla Livengood
President

Eric Nims
Vice President

Marlene Von Berg
Clerk

Jennifer Trotter
Board Member

Rebecca Hall
Board Member



January 29, 2023

To whom it may concern,

It is my pleasure to write this letter of recommendation on behalf of the Board of Trustees of the San Mateo-Foster City School District. During the 2020-2021 school year, our district sought out Superintendent Search Firms to fill a vacancy for the following school year and we unanimously selected McPherson & Jacobson to fulfill that responsibility. We were assigned the services of co-lead consultants Aida Buelna and Nicole Anderson.

The Board of Trustees entered the process with very high expectations because our outgoing Superintendent Dr. Joan Rosas had served with distinction. Upon engaging with Aida and Nicole, we were struck by their accessibility and strong communication skills. They treated our Board of Trustees as partners in the process and we felt heard by them.

The same can be said of the way that McPherson & Jacobson engineered the community involvement process. They administered a thorough community input process that involved surveys and stakeholder interviews. Their analysis of our community input truly encapsulated the needs, strengths, and desires of our community.

In terms of candidate engagement, they used technology to pre-record video messages from prospective candidates that were later shared with the Board of Trustees. They also completed a thorough vetting of candidates and ensured that we knew everything we needed to know before interviews began.

The interview process was unique and co-created with our consultants. Aida and Nicole facilitated the process of identifying top candidates that we invited in for an interview. They subsequently arranged to have each candidate interview 1:1 with each Board member for an hour, interview for a community panel of 25 for an hour, and attend a later afternoon interview with the entire Board for an additional hour.

Ultimately, our Board hired a new superintendent, Diego Ochoa, who we feel has served our district very well in his two years with the district. McPherson & Jacobson certainly delivered on their promise to work with our Board to create a community-driven process to select our new Superintendent.

1170 Chess Drive
Foster City, California 94404
650.312.7700 Telephone
650.312.7779 Fax
www.smfcsd.net

Board of Trustees

LaTisa Brooks Allison Proctor
Kenneth Chin Shara Watkins

Superintendent

Diego R. Ochoa



SAN MATEO-FOSTER CITY
SCHOOL DISTRICT



Sincerely,

Alison Proctor
2021 Board Vice President, 2022 Board President, & 2023 Board Member

1170 Chess Drive
Foster City, California 94404
650.312.7700 Telephone
650.312.7779 Fax
www.smfcsd.net

Board of Trustees

LaTisa Brooks Alison Proctor
Kenneth Chin Shara Watkins

Superintendent

Diego R. Ochoa



**Response to Request for Proposal
Superintendent Search Services**

**Sacramento City Unified School District
5735 47th Avenue
Sacramento, CA 95824**

**Due: August 8, 2023, 5 pm PT
Email: SCUSDSearch@scusd.edu**

Contact:

Monica Santana Rosen, CEO
Alma Advisory Group
1525 E 53rd Street, Suite 530
Chicago, Illinois 60615
Phone: 312-799-9642
Email: monica@almaadvisorygroup.com
Website: www.AlmaAdvisoryGroup.com

Part I - Cover Letter

Sacramento City Unified School District is one of the oldest in the western United States serving over 38,000 students on 75 campuses. The district reflects the rich history and diversity of the Sacramento community including racial, ethnic, and language diversity. During the 6-year tenure of former Superintendent Jorge Aguilar, Sacramento City Unified School District (SCUSD) has been working diligently to ensure that the 38,000+ students served by the district have equal opportunities to graduate and have equitable access to postsecondary choices, by working to close achievement gaps, creating effective school-family partnerships, ensuring strong supports for new teachers, and providing high-quality instruction. Continuing to build on this momentum to fulfill the district's mission will be the work of the district's next superintendent.

The SCUSD Board of Trustees (Board) will benefit from the partnership and support of a firm that is deeply familiar with the challenges and opportunities inherent to the urban superintendent's role and experienced in the development of a transparent recruitment and screening approach that mitigates bias, and ensures equity in decision-making.

Alma Advisory Group (Alma) is honored to submit a proposal to support the Superintendent search. Alma is a mission-driven, national education consulting and executive search firm founded in 2016 by Monica Santana Rosen, a Black Latina business owner, with the mission of fostering the culture, people, and practices that enable staff to do their best, empower teams to do great work, and propel organizations to accomplish outstanding results. Alma is well-established as a trusted advisor, thought partner and consultant for a number of dynamic nonprofits, districts and school operators nationally. We have demonstrated steadfast support for our clients, with results and measurable impact that have benefited our clients' entire organizations well beyond our engagement. We believe in capacity-building at our core, and we bring that unique lens to our executive search practice. We also have a clear focus on equity and diversity in hiring and leverage our expertise to build competency-based screening processes that mitigate bias, and help our clients stay grounded in the skills most important for the role.

Alma is well-established for the strength and the diversity of talent we provide our clients. Our searches have featured the following results:

- Finalists presented by Alma have been 46% Black, 14% Latinx, 31% White, and 8% Asian, 54% Female
- Hires selected by our clients have been 51% Black, 17% Latinx, 20% White, 12% Asian, 56% Female

Alma's distinguishing characteristics and transparent, inclusive, and equity-focused approach to the search process set us apart from others in the executive search field. As such, we are confident that we are the best qualified to support the SCUSD Board of Trustees in your search for the next Superintendent. Thank you for your thoughtful approach to this selection, and for your consideration of our firm. We welcome any questions you may have about this response.

If selected, Alma Advisory Group agrees to enter into a contract under the terms and conditions shown in the Instruction to Proposers and the Specifications.



Monica Santana Rosen
Chief Executive Officer, Alma Advisory Group
1525 E. 53rd St. Chicago, IL 60615
Phone: 312-799-9642
Email: monica@almaadvisorygroup.com
Website: www.AlmaAdvisoryGroup.com

Part II - Table of Contents

Table of Contents

Part I - Cover Letter	1
Part II - Table of Contents	3
Part III - Background and Experience	5
Part IV - Statement of Work / Action Plan	14
Part V - RFP Price Form	24
Part VI - Non-Collusion Declaration	26
Part VII - Addenda Form	28

Part III - Background and Experience

Contact Information

Proposer Name: Alma Advisory Group, LLC

Address: 1525 E. 53rd Street, Suite 530, Chicago, IL 60615

Phone: 312-799-9642

Fax: 877-917-1689

Authorized Representative: Monica Santana Rosen, Chief Executive Officer

Email address: monica@almaadvisorygroup.com

Company Background

Alma Advisory Group is not a traditional search firm. We carry out each search with a focus on organizational capacity building, so that our clients may replicate the search process without us if desired beyond our engagement. As former education leaders, we bring to our work a unique understanding of education organizations along with a dedication to making a positive impact for children and communities, especially those not traditionally well served. A superintendent search led by Alma has several distinctive offerings that are not typically provided by other firms:


- Clear focus on equity and diversity in hiring through a competency-based approach at all phases of the process
- Customized approach and interview tools collaboratively developed to meet the unique context of the district
- Transparent, inclusive and authentic community engagement, including intentional outreach at each stage of the process to communities that have been historically excluded or difficult to reach, yielding on average a 0.15 ratio (i.e. enrollment of 10,000 students, 1,500 survey responses)
- Thoughtful and thorough analysis and synthesis of focus group, community engagement and survey data, including a Board presentation to highlight results and recommendations for next steps forward
- Lead monolingual Spanish focus groups, stakeholder interviews and community forums, and provide human translation, not AI translation, in support of our communities and candidates in bilingual meetings and forums
- Facilitated planning with the Board to confirm alignment, clarify the competencies required for the next Superintendent and reach shared agreement on the key steps of the screening and decision-making process
- Anti-bias training delivered to all interviewers, and the design and utilization of anti-biased, competency-driven interview activities and tools to mitigate bias
- Design and facilitation of a finalist stage that enables authentic engagement with community and includes anti-bias training for all participants
- Facilitation and support for the Board at each stage of the process, especially at the stage of final decision making
- Round the clock availability and support from the Alma team for individual Board members and regular meetings with the Board as needed throughout the process

Alma is committed to not just communication but facilitated decision-making with the Board and other key decision-makers. Alma will work as a trusted partner with the Board and key stakeholders to ensure they are supported throughout the search process. This includes calibrating on the critical competencies and facilitating debrief and feedback at each stage of the interview and selection process. The Alma team will seek a primary point of contact to meet on a regular basis to review progress on the search. Typically, we will meet either weekly or biweekly to ensure the project is moving forward on time and on schedule. This would also include review and feedback of the recruitment plan, and access to national research or tools that support and inform the decision-making by the Board.

Women/Minority Business Enterprise Certification

Business & Contact Information	
BUSINESS NAME	Alma Advisory Group, LLC
OWNER	Mrs. Monica Santana Rosen
ADDRESS	1525 E 53rd Street Suite 530 Chicago, IL 60615-4575 [map]
PHONE	773-966-4998
FAX	877-917-1689
EMAIL	monica@almaadvisorygroup.com
WEBSITE	http://www.almaadvisorygroup.com
ETHNICITY	Hispanic
GENDER	Female
COUNTY	Cook (IL)

Certification Information	
CERTIFYING AGENCY	State of Illinois Commission on Equity and Inclusion
CERTIFICATION TYPE	WMBE - Women/Minority Business Enterprise
RENEWAL DATE	8/21/2023
EXPIRATION DATE	6/21/2025
CERTIFIED BUSINESS DESCRIPTION	NIGP 91838 Education and Training Consulting NIGP 91865 Human Resources, Relations Consulting NIGP 91875 Management Consulting NIGP 91883 Organizational Development Consulting



hereby grants

National Women's Business Enterprise Certification


to

Alma Advisory Group, LLC


who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).
This certification affirms the business is woman-owned, operated and controlled and is valid through the date herein.

Certification Granted: August 24, 2017
Expiration Date: August 31, 2023
WBENC National Certification Number: WBE1701626












WBENC National WBE Certification was processed and validated by Women's Business Development Center - Midwest, a WBENC Regional Partner Organization.



Authorized by Emilia DiMenco, President & CEO Women's Business Development Center - Midwest



NAICS: 541990, 541612, 561312, 611430, 611710
UNSPSC: 80101511, 80111500, 80111501, 80111511

[Renewal in progress and will be completed before the expiration date]

Superintendent Search Experience

Since 2017, Alma has supported a variety of nonprofit organizations, charter management organizations and districts large and small with their executive search needs. We have successfully completed the following school district superintendent searches:

- Denver Public Schools (2020-21) - Superintendent is still in role, K-12 Dive's Superintendent to Watch
- Cincinnati Public Schools (2021-22) - Superintendent is still in role, K-12 Dive's Superintendent to Watch
- Eugene 4J School District (2021-22) - Superintendent is still in role
- Evanston Township High School District (2022) - Superintendent is still in role
- Portland Public Schools (Maine) (2022-2023) - Recently appointed
- Cleveland Metropolitan School District (2022-2023) - Recently appointed
- Madison Metropolitan School District (2023 - present) - Search is in progress

Additional examples of some of our cabinet level searches are also included below.

Hartford Public Schools

In late 2022, Alma completed the executive search for the Deputy Superintendent of Hartford Public School, one of the largest districts in Connecticut, serving more than 20,000 students in 46 schools. To support this effort, the Alma team aligned many stakeholders to create a job description, actively sourced nationally for the position, designed and facilitated the screening and interviewing processes and supported the selection of finalists that included one Latinx female, one white female and one white male.

Guilford County Schools

The Alma team supported Guilford County Schools (GCS) with their executive recruitment and hiring efforts for several Cabinet level leadership positions, including Chief Operations Officer, Chief Student Services Officer, Chief Academic Officer, Assistant Superintendent of Special Education Services, Chief Innovation Officer, Chief Performance and Accountability Officer, Deputy Chief of Finance and Senior Executive Director of Technology Services. Similar to other searches, our team began this search by first clarifying the competencies most important to support Guilford County Schools' success and created a hiring process to identify a strong pool of talented and diverse candidates. The Alma team established job descriptions for each role, vetted potential candidates for each position, and developed an aligned screening process to measure the competencies identified for each role. As our team completes these searches, we are also helping the HR team document its process for succession planning and attracting and hiring strong executive leadership moving forward. Guilford County Schools has over 72,000 students.

Chicago Public Schools

Alma supported Chicago Public Schools (CPS) with a search for several key positions in the district over the last 6 years including the Chief Financial Officer, Chief of Diverse Learner Supports and Services, Budget Director, Chief Talent Officer, Chief Health Officer and Chief Operating Officer. As an example, to support the Budget Director search, Alma worked with key staff at CPS to clarify the leadership competencies most important for this role and defined a recruiting and screening approach to identify a strong pool of candidates. Over the course of the project, the Alma team delivered an updated, competency aligned job description for the position, a rigorous screening process, and a robust and diverse applicant pool, which yielded 80 candidates sourced overall, of which 40% were leaders of color and 35% female, with a mix of experience internal and external to education. Ultimately 4 finalists were identified for in-person interviews, of which 75% (3) were leaders of color and 25% (1) female, and at least 2 candidates were considered for roles beyond the Budget Director position itself.

Key Personnel

The team proposed to lead this project has completed a wide range of executive searches, including district superintendent and other c-level roles, including Chief Academic Officer, Chief Operating Officer, Chief Finance Officer, Chief Talent Officer and Deputy Superintendent. We have worked in some of the most politically complex environments in education, and our network is strong among leaders in urban school districts and charter management organizations.

Monica Santana Rosen, Chief Executive Officer (Executive Oversight)



Monica was born to immigrant parents who instilled in her a deep value for education. Monica spent the last two decades working to build strong diverse workplaces and enable leaders to do great work. Her career began in philanthropy with the Tiger Foundation, where Monica was part of a team that supported nonprofits working to break the cycle of poverty in New York City. Monica later served as the Executive Director for Management Leadership for Tomorrow (MLT), an organization working to diversify leadership in the upper ranks of the public and private sectors. Monica helped launch MLT's MBA-Prep program before pursuing her own MBA at Harvard Business School.

Monica joined Chicago Public Schools in 2004. She helped lead an HR redesign effort, and then managed and led the 65-staff member HR operational team at CPS. During her tenure, average transaction turn-around time improved from 8 weeks down to 3 days, call answer rates from 45% to 93%, and first call resolution from 45% to 75%. Monica then served as Talent Management Officer, where she focused specifically on leadership pipelines for the district. She spearheaded the redesign of a principal screening process, launched a national principal recruitment effort, and supported the strategic promotion, support and succession planning for principals. She also established the Leadership Development and Support unit, where she oversaw the district's Principal Induction program and support for the district's 26 Chief Area Officers (i.e., principal supervisors). In 2012 Monica launched a human capital consulting practice for Cross & Joftus, and in the fall of 2016, Monica ventured out to develop Alma Advisory Group, LLC with a talented and diverse leadership team, supporting organizations nationally to hire, develop, support and retain a high-quality workforce.

Monica provides executive oversight for all of Alma's Superintendent and C-level searches, and was the lead consultant for the Denver Public Schools and Evanston Township High School Superintendent searches.

Sylvia Flowers, Managing Director Talent Acquisition and Executive Search (Lead Consultant)



Sylvia is a native of St. Louis, holds a B.S. in Chemical Engineering and an M.B.A. from the Darden Graduate School of Business at the University of Virginia. Before dedicating her career to improving public education, she spent eight years in the private sector working as a chemical engineer for Monsanto and a finance profession for Duke Energy. She then joined the Broad Residency in Urban Education and began her education career in the Christina School District in Wilmington, Delaware. Sylvia also worked for Chicago Public Schools implementing the district's first Teacher Incentive Fund grant pilot program in 40 high-needs schools.

In 2009, she moved to Nashville, Tennessee and later served as the Director of Technical Assistance at the State Collaborative on Reforming Education (SCORE), a nonprofit and non-partisan advocacy and research organization founded by former U.S. Senate Majority Leader Bill Frist. Most recently, Sylvia spent seven years at the Tennessee Department of Education as the Executive Director of Educator Effectiveness and Talent, focused on implementing the state's educator education evaluation system and using human capital data to drive statewide policy, strategy, and technical support for districts in the recruitment, retention, compensation, professional growth, and recognition of effective educators. Sylvia joined Alma in 2020 and is the Managing Director, Talent Acquisition and Executive Search.

Sylvia served as the lead consultant for the Eugene School District 4J, Cincinnati Public Schools, Portland Public Schools, and Cleveland Metropolitan School District searches. She has also led several c-level district searches including those in Guilford County Schools and the School District of Philadelphia.

Deidre Hargrove-Krieghoff, Talent Recruitment



Deidre is an experienced HR and Operations professional who has spent more than 25 years serving in various roles in human resource leadership, operations, and development, in both private and nonprofit spaces. She most recently worked at the Madison Metropolitan School District (MMSD) where she served as the Chief of HR and Senior Executive for Workforce Development. During her tenure (2014-2022) the HR team increased their department diversity by 30%, district administrator diversity by close to 10% and teacher diversity to 15%. Prior to working at MMSD Deidre served as the VP of Workforce Development for the Urban League of Greater Madison (ULGM). Deidre is a trained Malcolm Baldrige National Quality Award Examiner. She holds a

bachelor's degree in Business Management and Communications from Concordia University and a master's degree in Business Administration from the University of Wisconsin – Madison.

Deidre joined Alma Advisory Group in 2022 and served as the lead consultant for the Deputy Superintendent search at Hartford Public Schools, and several c-level searches for Chicago Public Schools and the School District of Beloit.

Najjah Thompson, Talent Acquisition



Najjah is a native of Miami, FL., and holds a BA in Music Education and MM in Music Performance from the University of Miami. He is currently pursuing a MS in Learning and Organizational Change from the School of Education and Social Policy at Northwestern University. Najjah started his career in education and public service as a Servant Leader with the Children's Defense Fund's Freedom Schools Program. In 2015, he began teaching elementary and secondary music at Chicago Public Schools. After a few years of teaching, he transitioned to administration and became the Arts Education Specialist in the department of Curriculum and Instruction for the Madison Metropolitan School District. Most recently, Najjah transitioned to HR and spent three years leading Madison Metropolitan School District's Recruitment and Engagement Strategy where he was able to

successfully increase the number of highly-qualified diverse teachers and district administrators. Najjah joined Alma in 2022 as an Executive Search Specialist.

Nita Losoponkul, Talent Analytics



Nita has spent the last two decades working domestically and internationally in both the public (K-12 education) and private (energy, hospitality, financial services, consulting) sectors. She has led projects to implement change initiatives and drive process improvements, including designing and delivering talent development curriculum to support the change. As the Director of Innovation and the Director of Talent Acquisition at the Washoe County School District, she launched new high school magnet programs to create new opportunities for students and revamped hiring processes. At Public Impact, she worked with school districts across the country to plan and implement an Opportunity Culture, creating new career pathways for teacher leaders with sustainably funded higher compensation. Nita holds a bachelor's degree in Engineering from the California Institute of

Technology, a master's degree in Business Administration from the University of California at Los Angeles, and a master's degree in Educational Leadership from the Broad Center (now part of the Yale School of Management). She is also qualified as a Project Management Professional (PMP) and a Human Resources Senior Certified Professional (SHRM-SCP). Nita joined Alma in 2021 as a Talent Analytics Consultant.

Venus Velez, Talent Development, Community Engagement



Venus brings over 20 years of experience in the field of education, with a focus on equity and excellence. Her work has included district level reform efforts, community engagement, talent recruitment, selection and development, organizational development, non-profit management, program design and evaluation, and project management. Venus spent the earlier part of her career working in non-profit educational organizations, developing and leading college preparation programming for high school students from underserved communities. She then went on to work with the NYC Department of Education (DOE), initially supporting high school reform efforts, working with a team of school leaders to phase

out larger failing campus high schools and replace them with a more successful model of new small specialized high schools. Venus also supported the DOE’s community engagement strategy – working across the city to build support for the reform efforts and district restructuring and supporting the launch of a new parent and community engagement structure. Working closely with the Superintendent, Venus led the creation of a new parent engagement office in a region serving 139 schools. After leaving the NYC DOE, Venus continued her work in education supporting non-profit educational organizations, working on talent searches for educational leadership roles, and supporting other district level reform efforts. Venus completed her undergraduate work at Wesleyan University, the Education Policy Fellowship Program at Columbia University, Teacher’s College, and holds an MBA from the Zicklin School of Business. Venus joined Alma in 2018, supporting Executive Search.

References:

California Reference #1:

Organization Name:	Oakland Unified School District
Organization Size:	Approximately 34,000 students
Address:	1011 Union Street, Oakland, CA 94607
Contact Person:	Tara Gard, Chief Talent Officer
Email:	tara.gard@ousd.org
Telephone:	(510) 879-8000
Scope:	Executive Coaching, HR Assessment/Redesign

California Reference #2

Organization Name:	Equitas Academy
Organization Size:	Approximately 2,000 students
Address:	1700 W Pico Blvd, Los Angeles, CA 90015
Contact Person:	Founder Malka Borrego (now retired)
Email:	malkaroseborrego@gmail.com
Telephone:	(213) 201-0440
Scope:	Chief Schools Officer Executive Search

Below are five completed superintendent searches, including district contacts for references.

Reference #3:

District Name:	Cincinnati Public Schools
District Size:	Approximately 36,000 students
Address:	2651 Burnett Avenue, Cincinnati, OH 45219
Contact Person:	Ben Lindy, Board President
Email:	lindybe@cpsboe.k12.oh.us
Telephone:	(252) 432-9490
Scope:	Superintendent Search

In March 2022, Alma completed the executive search for the next superintendent of Cincinnati Public Schools. Cincinnati Public Schools is the 3rd largest district in Ohio, serving approximately 36,000 students in over 65 schools. To support this effort, the Alma team facilitated comprehensive community engagement and input meetings with stakeholders alongside members of the CPS Board of Education to collaboratively define competencies and determine attributes of the new superintendent. Alma actively sourced for the position nationally and we designed each step in the interview process, to include opportunities for the community to meet and interact with finalist candidates. The finalist candidates in this search included one Black man and two Black women.

Reference #4:

District Name: Eugene School District 4J
 District Size: Approximately 16,000 students
 Address: 400 North Monroe Street, Eugene, OR 97402
 Contact Person: Judy Newman, Board President
 Email: newman_j@4j.lane.edu
 Telephone: 541-790-7700
 Scope: Superintendent Search

Alma supported the Board of Eugene 4J during the search for the Superintendent during a tumultuous time for the Board. Alma’s CEO supported the Board as they worked to ensure shared alignment on the requirements of the role, as well as the Board’s shared ways of working together throughout the process. Ultimately four finalists emerged, which included two Black men, 1 Native American man, and 1 white woman. In the spring of 2022 the Board ultimately selected an internal district leader, who is Native American. Along the way Alma partnered closely with the Board, leading planning retreats and training the Board and stakeholders on managing bias throughout the process

Reference #5:

District Name: Cleveland Metropolitan School District
 District Size: Approximately 36,000 students
 Address: 1111 Superior Ave E, Suite 1800, Cleveland, OH 44114
 Contact Person: Leah Hudnall, Vice Chair of the Board
 Email: leah@legacyperspective.com
 Telephone: (216) 838-0030
 Scope: Superintendent Search

In Spring 2023, the Alma Advisory Group partnered with the newly elected Mayor Justin M. Bibb, the mayor’s Chief of Education and the Cleveland Metropolitan School District (CMSD) school board to lead the search for the next superintendent. Grounded in the community’s shared Cleveland Plan, the previous superintendent had served the district for over twelve years. Additionally, CMSD has a unique governance structure where the nine board members are appointed by the mayor in rotating terms. The Alma team successfully led the search which resulted in two finalists who both had ties to the Cleveland community, an African American man and a Latinx man.

Reference #6:

District Name: Denver Public Schools
 District Size: Approximately 89,000 students
 Address: 1860 Lincoln St, Denver, CO 80203
 Contact Person: Scott Esserman, Board Member
 Email: sdesserman@gmail.com
 Telephone: 303-909-2493
 Scope: Superintendent Search

In June 2021, Alma completed the executive search for the next superintendent of Denver Public Schools. Denver Public Schools is the largest district in Colorado, serving approximately 90,000 students in over 200 schools. To support this effort during the pandemic, the Alma team facilitated virtual community engagement and input meetings, in English and Spanish, to understand the key attributes the next Superintendent must possess, and top priorities for the next Superintendent to focus on. Alma sourced this position nationally, among both active and passive candidates, and developed the full interview process to include opportunities for the community to interact with finalist candidates. The finalist candidates in this search included one Black man, one Afro-Latino man, and one Latinx woman.

Reference #7:

District Name:	Evanston Township High School District 202
District Size:	Approximately 4000 students
Address:	1600 Dodge Ave, Evanston, IL 60201
Contact Person:	Pat Savage-Williams
Email:	savagep@eths202.org
Telephone:	847-721-9007
Scope:	Superintendent Search

Alma worked with the Board of ETHS as they carried out the selection of the district's next Superintendent in Spring 2022, following the 17-year tenure of the outgoing and beloved Superintendent. In support of this process for the district of nearly 4,000 students, Alma designed and facilitated a community engagement process to understand the perspectives of the Evanston Township community, and then worked with the Board to clarify the requirements for the next Superintendent. With Alma's partnership, the Board made the bold decision to allow an internal successor to apply for the role, and to interview with community members directly as the sole finalist. A longtime educator and administrator in the district was assessed against the competencies of the role instead of being assessed against other candidates. This process was more fair to the internal candidate, as well as potential external candidates, and resulted in the district's first-ever Black male leader.

Part IV - Statement of Work / Action Plan

Alma proposes the following timeline and process for the recruitment and selection of the superintendent by early 2024 for the Board's consideration:

1. Board's Executive Committee Planning Session (within 10 business days of contract award)

If awarded the contract, the Alma team is prepared to immediately begin designing the Board's Executive Committee Planning Session, to be held within 10 business days. This planning session will include confirming a refined timeline and project plan to meet our target of an appointment early in 2024, identifying key stakeholders to engage throughout the process, and mapping out a communication strategy to ensure transparency and wide-spread participation, in partnership with the SCUSD's Chief Communications Officer and the Constituents Services Office.

2. Stakeholder Engagement on Organizational Priorities and Key Competencies for the Role (late Aug - early Sept)

Our authentic engagement of stakeholders is a distinguishing feature of Alma's search process. The Alma team will meet with select members of the Board, its designees, district office, school leaders, teachers and staff, union leaders, parents and students, community groups and members, and any other key stakeholders (as determined in consultation with the Board) to gather their input on the role and the steps of the selection process. This has typically included interviews, focus groups and surveys, with the intentional identification of affinity groups, including Latinx, Black, Asian American, LGBTQ, monolingual (non-English speaking) families, and other communities that have been historically excluded or difficult to reach. Alma's community surveys have resulted in an average response to student ratio of 0.15 (i.e. enrollment of 10,000 students, 1,500 survey responses). Alma will analyze and synthesize the stakeholder feedback and present it to the Board upon completion.

3. Recruitment Strategy Development and Execution (mid September)

Alma will review any ideal candidate profiles already created and facilitate conversations with key leaders to review the stakeholder feedback to confirm the most important competencies required of the position, and those traits that contribute to a successful team culture within the organization's unique context. We will also assess the current market conditions to advise on the competitiveness of the salary. Based on these conversations, the Alma team will refine the job description with an eye towards attracting the desired candidate, and explicitly describing those leadership attributes most important for the Superintendent role, including promotional materials to advertise the role and market the opportunity, for the Board's review and approval.

Upon completion of stakeholder engagement and the job profile and competitive compensation package, the Alma team will build a recruitment strategy, with recommended sources to recruit for top candidates, both locally and nationally, and assemble a network contact list for personal outreach to help spread the word about the position and pursue nominations of high-potential candidates, to ensure wide and effective outreach. Our network is strong among leaders in urban school districts and other organizations in the K12 space. With a team of former education leaders, we begin our searches by scouring each of our personal networks and reaching out to colleagues for personal nominations and recommendations. In addition, the Alma team researches leaders in roles that are similar in scale and experience, with a priority for track records aligned with the competencies required of the role. The Alma team will then partner with the Board to build a pool of potential candidates and monitor the results of recruitment efforts. We leverage our recruiter licenses and professional membership organizations to directly outreach to prospective candidates and advertise on local and national web-based posting sites where potential hires are likely to learn about the opportunity and will prepare and post with the Board's approval, and in compliance with any legal requirements.

Our team uses an Applicant Tracking System to manage all aspects of the candidate pipeline, helping our team to stay organized throughout the search, to access real-time data for our clients, and to maintain clear and transparent communications with candidates. The system interfaces with several job boards and posting sites to maximize the views of our job postings and ensure that our postings get seen by many job seekers. Alma will prepare a customized application for prospective candidates to apply to, through our Applicant Tracking System.

4. Screening Process Design (late September)

In addition to designing the recruitment strategy, the Alma team will propose the steps of a screening process for the role and draft all interview tools, customized to SCUSD's unique context. This typically includes resume screening protocols, candidate profiles mapped to key competencies, interview guides for each round with look-fors and scoring rubrics, and performance tasks and scenarios to assess the specific competencies required for the role. Decisions will include which internal team members and/or stakeholders should be engaged in the screening process, key roles in the interview process, and sequence of steps from first screen to final hiring decision. Our purpose is to minimize bias at every step in the process, and keep the process focused on assessing those skills most important for the role. To ensure fidelity to the agreed upon competencies, our team continuously refers to and ensures alignment of all stages of our process to these competencies.

5. Monitoring of Incoming Talent Pool and Initial Screening of Top Candidates (October to November)

The Alma team will monitor incoming applications together with the Board and will work proactively to ensure a strong and diverse pool of candidates continue to apply for the role, to ensure an acceptable list of candidates in the timeframe desired. The team will meet with the organization weekly to review progress and will provide reports with clear data tracking metrics to understand the strength and diversity of the pool and status of candidates in process, including the number of candidates at each step (e.g., first screen, rejections, etc.). We will also review incoming resumes and identify top candidates for a first-round screen in partnership with our client. The Alma team will carry out first-round interviews and recommend candidates for second round interviews to be completed by the client organization. Candidate profiles will be provided for any interviewed candidates summarizing the background information along with candidate strengths, questions, and recommendation on whether to advance to finalist screen. The interview and selection process typically includes training for all interviewers with a focus on understanding bias and mitigating bias during the debrief discussion.

6. Finalist Interviews and Background Checks (early December)

The Alma team will design second and subsequent round screening tools, developing interview guides and providing guidance for our client's leaders to facilitate in-person interviews and debrief for competency-driven interviewer feedback. Our team is particularly skilled at facilitating the feedback and debrief process with key decision makers at each stage of the selection process.

The Alma team will provide initial background and reference checks for any candidate prior to moving to the finalist stage. This will include a search of press on the candidate, conversations with 3-5 references, and any additional network background checks possible to understand the candidate's reputation, and to identify any potential optics issues that the Board would want to be aware of and/or address if they moved forward. As the organization engages with candidates, we will continue to calibrate on desired competencies and strengthen screening protocols as needed along the way until our client finds its chosen candidate and has an accepted offer. Alma typically partners with the HR team in the completion of any standard criminal or financial background checks required by the district.

The finalist interview and selection process typically includes training for all interviewers, including the Board, student, staff, family and community panelists, with a focus on understanding bias and mitigating bias during the debrief discussion. Alma is available to attend and assist in the finalist interviews and will facilitate debrief meetings to discuss the results of the interviews.

7. Contract Negotiations (mid-December)

Alma recommends that the Board engage its own counsel in negotiating the terms of the superintendent's contract. However, Alma plays a very helpful role as liaison between finalist candidates and the district, identifying the top priorities for the candidates, salary expectations and other terms that will be important for the candidate. We are happy to coordinate with general counsel however helpful to ensure a smooth conclusion to the contract negotiation process.

Alma will work with the Board and SCUSD's communications team to craft a press release to announce the final selection. We will also close out the application process with all candidates.

8. Knowledge Transfer (January)

The Alma team will engage in a post-search debrief call to advise on which practices and lessons learned for this process can be applied to the district's longer-term approach to executive succession planning and hiring.

Board Supports

Selecting the superintendent is one of the Board's most important functions and this is at the heart of how we've designed our support for search committees going through this process. This is one of the defining features of what makes our firm unique from others. Throughout the process, Alma team members work alongside the Board or a subcommittee of members to codesign a search process that meets their needs, ensure adherence to the agreed upon competencies that serve as the foundation for the job profile and interview process, and walk side by side to address any challenges presented along the way. We are your trusted advisor throughout the process to ensure transparency with the community and the press. Our team remains fully available to the Board throughout the process to ensure we work together to address any challenges that may present during the search process. In a typical search process, we are meeting at least biweekly with the search subcommittee and planning for regular and thoughtful engagement with the full Board to keep them informed along the way.

Major Challenges and Addressing the Challenges

Attracting a strong Superintendent candidate aligned with the mission and vision of the Board requires several key elements. First and foremost the Board members should be aligned on the key requirements of the role, and the skills most important to recruit and screen. A major risk to a search is when the governing body charged with making such a critical decision is misaligned throughout the search. For this reason, Alma facilitates initial planning sessions with the key decision makers to ensure that leaders are aligned with the approach, stakeholder engagement, and the requirements of the role. An additional risk is the perceived or real dysfunction among top leaders. Candidates will research past meetings, press, and information from their networks about how well the governing body works with each other and works with the district's leadership and staff. Negative press, or perceived infighting or disagreements can undermine the recruitment efforts for the district. Alma mitigates this risk by helping the Board identify any risks to their reputation, and ensure that Board members are able to address issues or speak to them openly during the search. Alma is very clear with candidates about the desires of the Board and what they're seeking in their next leader. This helps us find candidates who will be aligned with the Board right from the start.

Additional risks and challenges during a superintendent search stem from gaps in communication and the time sensitive nature of the search process. Alma has found that the absence of a liaison for communication and coordination can stall the process, particularly in the critical stakeholder engagement phase of the search. To counteract this challenge, Alma intentionally works with the Board to determine a point of contact. Providing this consistent liaison for the search is one of the responsibilities that Alma asks the district to commit to upholding.

A lack of dedicated time from the Board can stall or delay the process. This can impact timely decision making and keeping candidates engaged through the process. Alma will work with the selection committee to outline the specific time periods and responsibilities of the selection process. This will allow search committee members to plan ahead. Alma will also keep search committee members updated with regular communication about progress and next steps, providing reminders as needed to keep the search process moving. Finally, Alma also acts as an engaged facilitator to support the search committee members as they consider candidates and make selection decisions.

District and Board Supports Needed

Alma requests SCUSD and the Board to support the search in several key ways: a) advise on stakeholder engagement, including communications and outreach through media channels and community partners, b) calibrate on candidates,

engaging first in a review of potential candidates to ensure we are aligned on the skill set and experiences required, and c) support the scheduling and attendance of any interviewers or other stakeholders engaged in the process.

The Alma team is able to provide live translation and conduct community and family focus groups and surveys in Spanish. We will need support in securing translators for additional languages, including Hmong, Vietnamese, Russian, Marshallese and Chinese.

The Alma team will seek a point of contact in the district to work with us, meeting on a regular basis to review progress on the search. Typically, we will meet either weekly or biweekly to ensure the project is moving forward on time and on schedule. Additionally, we will establish a secure site for communication and sharing of documents, including project plans, stakeholder engagement templates and notes, candidate materials, and interview protocols. We work with our clients to utilize the technology system (Sharefile, Google, Dropbox) which allows ease of accessibility and security.

We will also seek a point of contact from the search committee to work with us, meeting on a regular basis to review progress on the search. We can determine the appropriate frequency of check-ins when the project launches.

The successful completion of a search requires regular communication, responsiveness, and quick turnaround when candidates are at the finalist stage. Therefore, we would ask the following of the district:

- Maintain regular contact with Alma as they interview candidates, providing feedback within 2 business days of any interview.
- Move approved finalists from interview to final decision within 3 weeks. If an organization takes longer and loses any finalist, additional expense may be required to continue the search and identify new candidates.
- In such a case, we will ask the organization to complete final payment to Alma and negotiate new payment if continuing the search.

Promotional Material:

- Cleveland Metropolitan School District Superintendent Search - our efforts, in partnership with CMSD, resulted in 63 1:1 interviews, nearly 1200 focus group participants, 200+ community gathering attendees, and over 3700 survey responses, to involve the community and key stakeholders in the Superintendent search process



- Portland Public Schools (Maine) Superintendent Search - working alongside the dedicated team at Portland Public Schools, our outreach efforts resulted in 162 participants in interviews and focus groups, 150 participants in both in-person and virtual community gatherings, and over 1400 survey respondents (survey was available in 8 different languages, both online and in print) to ensure outreach to include those not typically well represented



- Cincinnati Public Schools Superintendent Search - example of a job posting, resulted in Superintendent being selected. K-12 Dive named her one of 5 Superintendents to watch in January 2023 (<https://www.k12dive.com/news/5-superintendents-to-watch-in-2023/639945/>)



Cincinnati Public Schools Job Description – Superintendent

Who We Are

Cincinnati Public Schools (CPS) is the third largest district in the state of Ohio, serving approximately 36,000 students in 65 schools, including 13 high schools, 47 elementary schools and 5 K-12 schools. As a result of our steadfast dedication to the whole child and our innovative programs and supports, we remain one of the few urban school districts in the US experiencing growing enrollment year over year. CPS strives to create a supportive learning environment with a rigorous curriculum that allows all learners to create, connect and engage in the world around them. Central to the district's success are the dedicated teachers and administrators who possess a growth mindset and are committed to creating a system of continuous improvement, implementing strategic interventions, and evaluating their performance. CPS has a rich and diverse history of innovation serving the community and creating long lasting community partnerships all dedicated to removing barriers, ensuring equity and enabling a strong education. CPS is renowned for its Community Learning Centers and school-based health centers, enabling schools to truly serve as the centers of their communities, providing holistic health and mental health services to students and families. We also offer accredited Montessori programming, including at the high school level. The district has expanded access to preschool for all students. We are the first and currently the only school district in the state of Ohio with a COVID vaccine policy, and we are proud of our recently approved [anti-racism policy](#), as well as our [Equity and Excellence in Education Policy](#).

What You'll Do

The Superintendent will serve as the face of the district and our chief communicator of CPS. This role, along with the Treasurer, report directly to the Board of Education. While CPS is proud of our accomplishments, there is much left to do on behalf of our students, and the Superintendent will bring the vision and leadership skills necessary to build on our successes to date, while tackling the challenges and opportunities that lie ahead. Key leadership responsibilities for our next Superintendent include the following:

Your Key Responsibilities (The "What")

- **Foster an intentionally inclusive and diverse school system, supporting the whole student for strong academic achievement and growth**
 - Build on CPS's track record of whole student supports and ensure an immediate focus on social emotional learning supports and safety for students.
 - Adopt instructional models and structures based on practices that are research based, culturally responsive and demonstrated to be effective and desired by families.
 - Address systemic racism and other '-isms': confront through analysis, action, and how the district is addressing persistent systemic segregation and inequities in order to improve the experience of students, teachers, staff and families of color.
 - Advocate for learning environments that fully support multilingual learners and students with diverse learning needs.
 - Make a positive impact on student learning, with a balanced focus on academic rigor, proficiency and student growth over time.
 - Prepare our students for career and college, by strengthening programming from PK-16. This begins early with more students reading by 6, all the way to high school graduation, ensuring that students graduate with credits for college and on a path to a career.
 - Continue to expand and strengthen program opportunities into neighborhood schools, advanced placement offerings, career and technical education, and our academic learning centers.



- **Strengthen relationships and foster an environment of increased trust with the Board and the community to build a unified vision**
 - Communicate and collaborate with all members of the board, advising the board on initiatives and issues in the district; provide leadership to enable the board to function effectively. This includes fostering an open relationship and clear vision for role clarity between the Board and Superintendent.
 - Strengthen communication and collaboration with parents to enhance learning for their own children and all children.
 - Expand trust, partnership and connection with our community, learning what matters to our families and our communities to inform key decisions and priorities for the district.
 - Our relationships with employee associations in the district are vital to our success. Our Superintendent will continue to strengthen partnerships and collaboration with our unions.

- **Develop and implement a clear strategy for the future of the district**
 - During the summer of 2018, CPS created a [community-designed three-year strategic plan](#), which has guided the work of the district over the three years since. Our strategic plan completes in the 21-22 school year. Our next Superintendent will have the opportunity to engage our community once again, and lead the development of our next strategic plan.
 - The Board sees the strategic planning process as essential to establishing the future vision of the district, with a focus on innovation in all areas, including the support of green community initiatives and furthering our goals for student success in every classroom.

- **Support a Thriving Workforce:**
 - We know that our most important factor in closing opportunity gaps is to attract, retain and develop our school leaders and teachers, who are central to student success. We must continue to support strong leadership development programs – of both school leaders and teacher leaders – and we are fully committed to investing in the growth and development of our educators.
 - Recruit, retain, develop and inspire highly effective staff at every layer of the organization, with a particular emphasis on diversity, fair and equitable compensation, and the implementation of culturally-responsive education practices.
 - Create the conditions where staff collaborate, feel supported and are able do their best work on behalf of the students they serve.

- **Leading effective systems and efficient operations within the district:**
 - Manage the day-to-day operations of the district within the policy parameters adopted by the Board, assuming responsibility and authority for the planning, operation, supervision, assignment, and evaluation of the programs, services, staff, students and facilities of the district.
 - Starting from the leadership team through the organization, assess and ensure a strategic organizational structure that is optimized to provide efficient service, strategic problem solving and customer service mindset in support of each school's success.
 - Address operational challenges, including transportation, busses and staffing. Build on technology strengths and narrow our digital gaps.
 - Focus on developing professional development and competencies of staff through precise, individualized professional learning aligned with achievement goals.
 - Make recommendations regarding selection or termination of the district's staff, consistent with laws of the state and district policy.



The Skills You'll Need to be Successful (The "How")

- **Student-Centered Decision Making**
 - Put students first, in all aspects, ensuring holistic support while strengthening academic programs and instructional practice.
 - Lead courageously, centered in children, and seek out the voices of marginalized communities to ensure diverse input on key decisions.
 - Engage in transparency in decision making and share with stakeholders how their input informed the district's decisions.
 - Demonstrate belief and hold self and others accountable for reaching high academic achievement of all students.

- **Commitment to Equity**
 - Recognize race and power dynamics playing out within our organization at all levels and interrupt those inequities through honest and difficult conversations and actions.
 - Address matters of race, equity and bias in how decisions are made with clarity, confidence, humility, historical context, and empathy.
 - Foster, promote, and drive a culture of inclusion in the organization and commit to improve DEI practices in the district's planning, prioritization and implementation of key initiatives.
 - Build authentic relationships across lines of difference (race, ethnicity, gender, age, socioeconomic background, LGBTQ status, etc.) both internally and externally.

- **Innovative and Inspirational Leadership**
 - Build on the organization's past successes and commit to continuous improvement through analysis, inquiry and assessment of results and alignment to district strategic priorities.
 - Lead the organization through strategic planning and mobilize the community behind a unified vision, goals and key priorities.
 - Facilitate and secure buy-in for a clear and compelling vision of innovation and organizational excellence.

- **Effective Relationship Building and Communication**
 - Serve as an ambassador for CPS students, building effective relationships with city and community leaders, helping to tell the story of CPS's successes, and successfully advocating when needed to ensure that the district is able to meet students' needs.
 - Challenge assumptions and preconceived notions when needed to avoid distraction from core priorities and goals in the better interest of student success.
 - Build trust among board members, district staff, teachers, and leaders, and core stakeholders to establish a shared vision for the district.
 - Communicate effectively, tailoring messages for the audience, context, and mode of communication.
 - Listen compassionately with an open mind - seeking to fully understand community members and stakeholders perspectives before establishing the direction forward.
 - Navigate politically complex structures, relationships and dynamics to challenge ideas and enable thoughtful decisions and positive outcomes for students.
 - Maintain visibility and work collaboratively with diverse stakeholders at all levels.

- **Extraordinary Team Leadership and Management**
 - Effectively balance the tension between local site based decision making, empowered school leaders and the vision/need for coherence and equity across all schools.
 - Build, inspire, manage and coach an effective senior leadership team/Cabinet to achieve ambitious goals aligned with the strategic plan.



- Hold self and others accountable for high standards of performance, communication, collaboration and transparency toward the achievement of key goals and priorities.
- Model and foster conditions for professional growth and organizational learning through continuous feedback, honesty, and coaching.

What You'll Bring

- Successful experience working in diverse economic, multicultural, and multilingual communities and environments. Proven cultural-competence skills with a history of inclusive and relevant equity practices.
- Demonstrated track record of success with improving student and/or organizational outcomes and data-driven decision making.
- Advanced knowledge of public school policy and law, procedures and management. Thorough understanding of national, state and local educational goals and standards required to advance PK-16 public education.
- A deep commitment to the importance of public education and advocacy for all students.
- 10 years of senior leadership experience at progressive levels of responsibility with evidence of successful development and organizational outcomes.
- Experience working in conjunction with a board to identify priorities, establish goals, monitor progress, and produce outcomes in service to stakeholders.
- A growth mindset and belief that continuous improvement happens through constant learning.
- Ability to navigate uncertainty and ambiguity in times of tremendous change, and to prioritize work efforts to achieve overall strategy as defined in collaboration with the Board of Education.
- Eligible for a Superintendent's license in the State of Ohio.

Want to Learn More?

We invite qualified candidates for the role of Superintendent at Cincinnati Public Schools to express interest in the role by visiting the [Alma Advisory Group website](#).

What We Offer

Salary for this integral leadership position is competitive, and commensurate with prior experience. In addition, a comprehensive benefits package will be included in the ultimate offer for the identified sole finalist. We look forward to discussing details with you as the interview process progresses.

The Cincinnati Public School District provides equal educational, vocational and employment opportunities for all people without regard to race, gender, ethnicity, color, age, disability, religion, national origin, creed, sexual orientation, or affiliation with a union or professional organization, and provides equal access to the Boy Scouts and other designated youth groups. The district is in compliance with Title VI, Title IX and Section 504 of the Vocational Rehabilitation Act. For additional information, contact the Title IX Coordinator or Section 504 Student Coordinator, (513) 363-0000.

Part V - RFP Price Form

REQUEST FOR PROPOSAL PRICE FORM

Sacramento City Unified School District
5735 47TH Avenue
Sacramento, CA 95824

RE: Request for Proposal – Superintendent Search

Dear Members of the Board of Trustees:

The undersigned, doing business under the firm name of Alma Advisory Group, LLC, having carefully examined the Notice to Proposers, the Instructions, and the Specifications for the proposed Superintendent Search Services, proposes to perform the contract, including all of its component parts, and to furnish all services, and taxes called for by them for the entire order, as follows:

Amount of proposal \$129,157

SUBMITTED BY:

Alma Advisory Group, LLC

COMPANY

1525 E 53rd St, Ste 530

ADDRESS

Chicago, IL 60615

CITY/STATE/ZIP



SIGNATURE

Monica Santana Rosen

PLEASE TYPE OR PRINT NAME

Chief Executive Officer

TITLE

8/8/2023

DATE

312-799-9642

PHONE

Part VI - Non-Collusion Declaration

NON-COLLUSION DECLARATION

State of California)
)
County of Cook (Illinois)) ss.

I, Monica Santana Rosen, being duly sworn, declare that I am Chief Executive Officer of Alma Advisory Group, LLC, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his/her/their proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this 8th day of August, 2023 at Chicago, Illinois California.



Signature

Part VII - Addenda Form

ADDENDA

The undersigned acknowledges receipt of the following addenda and the cost, if any, of such revisions has been included in the Lump Sum Grand Total of your proposal.

Addenda No. N/A Dated N/A

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Name of Proposer Alma Advisory Group, LLC



Superintendent Search Proposal for



August 8, 2023



449 W. Foothill Blvd., #427
Glendora, CALIFORNIA 91741
(916) 520-4951

WWW.LEADERSHIPASSOCIATES.ORG

ERIC ANDREW ♦ KENT BECHLER ♦ TOM CHANGNON ♦ MARC ECKER ♦ RICHARD FISCHER ♦ SALLY FRAZIER ♦ JUAN GARZA ♦ PEGGY LYNCH ♦ MIKE MILLER ♦ DENNIS SMITH ♦ RICH THOME ♦ SANDY THORSTENSON ♦ DAVID VERDUGO

SENT VIA EMAIL

August 8, 2023

Chinua Rhodes, Board President
Sacramento City Unified School District
5735 47th Avenue
Sacramento, CA 95824

Dear President Rhodes and Sacramento City Unified School District Board of Trustees:

Leadership Associates is pleased to submit a proposal to partner with you and your district to select a new superintendent.

Our firm has worked with a wide variety of school districts throughout California since our founding in 1996. Since that time, Leadership Associates has completed more than 650 executive searches, with the majority being superintendent searches, for California school boards. More than 85% of the superintendents selected have remained in their positions for more than five years.

Our intentionality to support the diverse student population in California is reflected in our recruitment efforts. We work diligently to ensure the candidate pool includes candidates that have a proven track record of experience in culturally proficient practices that have proven successful in addressing educational equity gaps. In fact, this past year, 63% of the individuals selected by school boards where Leadership Associates led the search were women or persons of color. This approach is made possible through the extensive network of our diverse partners who have expertise leading school systems through an equity lens. We believe this deep commitment has been the key factor contributing to our unparalleled successful placement of high-quality superintendent candidates across the state. We will dedicate ourselves to ensuring you have the finest and most diverse pool of candidates from which to select to serve as your new superintendent. (See equity and diversity statement included in our proposal.)

In addition to working with the District on several successful searches, our work includes partnering with Boards in several similar and/or nearby districts such as ABC Unified School District, Mt. Diablo Unified School District, Folsom Cordova Unified School District, Fontana Unified School District, Gilroy Unified School District, and San Rafael City Schools. Through the continued participation of several of our partners in education organizations such as the California Collaborative for Educational Excellence (CCEE) and the California County Superintendents Educational Services Association (CCSESA), we have remained current on key education policy and system wide developments including Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation. We have a strong record of success in helping districts find superintendents who meet the profile developed by the Board with extensive engagement from staff, parent leaders and community led by Leadership Associates.

Through our years of experience, we have come to understand and respect the uniqueness of each board and district. While there are similarities among districts, we believe that each district has a unique culture that is important to respect and understand. There are many good superintendent candidates but only some will be the right match for your school district. It is our job and our commitment to you to find those candidates that best match your ideals and beliefs as a district.

In considering the uniqueness of Sacramento City Unified School District, we are aware and respectful of the District's accomplishments and priorities:

- Long History of Tradition and Excellence
- School Plan For Student Achievement
- Equity, Access & Social Justice Guiding Principles
- Measure H Bond Referendum
- CSBA Golden Bell Awards
- Rosemont High School Robotics Team
- SCUSD's Central Kitchen Award
- SCUSD's Get To Know Us Fair

We would welcome the opportunity to partner with the Board to discuss the search process, including options for staff and community input, an overview of the potential candidate pool, timeline, and the importance of maintaining a confidential process. We also want to obtain from the Board and subsequently from staff, parents and community groups' perspectives on District strengths and challenges as well as the desired qualities and characteristics of the new superintendent. As native speakers, Blanca Cavazos and David Verdugo have experience engaging Spanish-speakers in community input sessions. Once this is done, we will prepare a summary report for the Board, develop a position description for Board review, and begin recruiting and vetting candidates who will be an excellent fit for you to choose from to serve as your next superintendent.

If our firm is selected, Blanca Cavazos, David Verdugo and Sally Frazier will be the lead consultants actively involved with this search. We are highly proficient in this field and are also former superintendents with many years of experience. In addition, to ensure the widest possible pool of qualified candidates, all partners who are located in various geographical regions of the state will actively support and assist with the search. Profiles of each partner are provided in the Qualification Statement of our proposal. We will use our extensive leadership network at the state and national level to help find the best candidates for this exciting, challenging, and rewarding position.

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

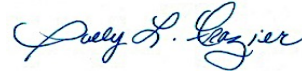
Respectfully,



Blanca Cavazos, Ed.D.
Lead Consultant
Leadership Associates



David Verdugo, Ed.D.
Co-Lead Consultant
Leadership Associates



Sally Frazier, Ed.D.
Co-Lead Consultant
Leadership Associates



TABLE OF CONTENTS

Part I: Introductory Letter	1-2
Part II: Table of Contents	3
Part III: Background and Experience	
Partner Qualifications and Experience	4-8
Executive Summary	9
Qualification Statement	10
References	11
Diversity and Equity Statement	12
Leadership Associates Search List	13-16
Commendations	17-19
Part IV: Statement of Work/Action Plan	
Search Process Flow Chart	20
Search Process Plan	21-22
Proposed Timeline	23
Part V: RFP Price Form	
Proposal Price Form	24
Fee and Summary of Services	25
Sample Services Agreement	26
Part VI: Non-Collusion Declaration	27-29
Part VII: Addenda Form	N/A

Lead Consultants and Contact Information

Blanca G. Cavazos, Ed.D.

661.491.0177

bcavazos@leadershipassociates.org

Sally Frazier, Ed.D.

559.232.5476

sfrazier@leadershipassociates.org

David Verdugo, Ed.D.

562.810.6249

dverdugo@leadershipassociates.org



Leadership Associates

449 W. Foothill Blvd., #427

Glendora, CA 91741

www.leadershipassociates.org

Sarena Fairrington

Executive Assistant

916.520.4951

sfairrington@leadershipassociates.org



PARTNER QUALIFICATIONS

QUALIFICATIONS OF LEAD CONSULTANTS

Blanca Cavazos, Ed.D., – Partner

Blanca Cavazos served as Superintendent of the Taft Union High School District for over eight years. Prior to becoming Superintendent, she served as Chief Instructional Officer for Kern County Superintendent of Schools. Her previous administrative roles include Task Force Administrator, High School Principal, Assistant Principal of Instruction and Assistant Principal of Special Services. Dr. Cavazos serves as a Director-At-Large on the State Board of Directors for the Association of California School Administrators (ACSA). She has also served as adjunct lecturer for the Educational Administration, Secondary Education, Bilingual Cross-cultural Education and Modern Languages programs at California State University, Bakersfield. Her experience includes coaching administrators at the high school and elementary levels, building collaborative labor-management partnerships, and leadership development. Recognitions include Educational Leadership Award from ACSA Region XI, (2021); induction into the California State University, Bakersfield Alumni Hall of Fame, Businesswoman of the Year by the Kern County Hispanic Chamber of Commerce, (2020); runner up for the National Association of School Superintendents Superintendent of the Year Award; and Superintendent of the Year Award from ACSA Region XI, (2019). An educator for 39 years, Dr. Cavazos graduated from Arvin High School, (Kern High School District), where she taught and later served as principal for 13 years. Her three sons, who also attended Arvin High, graduated during her tenure there.

Sally Frazier, Ed.D. – Partner, Lead Facilitator

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.

David J. Verdugo, Ed.D. – Partner

David served as Superintendent for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA, Director of Secondary Education, Principal at both Elementary and High School levels, teacher, and coach. He has a total of 43 years in the field of education spanning Grades K-12. 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 serving students of diverse populations and socioeconomic levels in urban and suburban settings. He was named the Association of California Administrators (ACSA) Region XIV Superintendent of the Year; received the California State University, Long Beach Outstanding Superintendent Leadership Award in 2012; the ALAS, Association of Latino Administrators and Superintendents; National Outstanding Educator Award in 2013; and, in 2020, was inducted into the University of Southern California USC Rossier School of Education "Hall of Fame", making him only the 23rd recipient of this prestigious award. 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. He was the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) until 2019, as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.



QUALIFICATIONS OF SUPPORTING CONSULTANTS

Eric D. Andrew, Ed.D. – Partner

Dr. Andrew began his education career in 1979 as a teacher in Claremont Unified School District, where he taught students in kindergarten through sixth grade, and later became a site principal for elementary, middle and high school levels. Dr. Andrew served as Director of Student Services in Redlands Unified School District, served as an Assistant Superintendent of Educational Services in Glendora Unified School District, and later became Superintendent of the Campbell Union School District, a position he held for seven and a half years. Dr. Andrew is currently the President of the Region 8 Retiree Charter, a Region 8 Executive Consultant, and is on board California Association of African American School Administrators (CAAASA) and Santa Clara County Alliance of Black Educators (SCCABE). He also serves as an active member of the California Association of Latino School Administrators (CALSA). As a well-respected equity-focused administrator and instructional leader, he has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year (2017). Dr. Andrew has been recognized by the Association of California School Administrators (ACSA) as the Region 8 Superintendent of the Year (2014), the State and Region 15 Central Office Administrator of the Year (2009), and the Region 12 Pupil Services Administrator of the Year award (2005). He holds a master's in education from Cal-Poly, Pomona, an administrative credential from Cal State San Bernardino and a doctorate in education from the University of LaVerne.

Kent L. Bechler, Ph.D. – Partner, Executive Leadership Development

Kent served as superintendent of the Corona-Norco Unified School District, the 9th 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).

Tom Changnon – Partner

Tom served as Stanislaus County Superintendent of Schools from 2007-2019. In his 12 years in office, Tom championed Civics Education, Character Development, Parent Involvement and Career Technical Education (CTE) programs. He earned his BA degree from Stanford University, Master Degree(s) in School Administration (St. Mary's, USF), and Teaching Certifications from College of Notre Dame. Tom has over 40 years of education experience at the elementary, middle, and high school levels. He also served as Assistant Superintendent and Superintendent prior to his election as the County Superintendent. Tom is an active member of the Association of California School Administrators (ACSA) serving on many local, regional, and state committees including ACSA's Small School District Committee. Tom has received a number of awards, including being selected twice for the Bill Ullom Award and twice a recipient as the regional Superintendent of the Year award. In 2018, he received the Chamber Lifetime Citizen Achievement Award. Tom played intercollegiate baseball while at Stanford University and was drafted by the Houston Astros Baseball organization as a left-handed pitcher. He played a few years in the minor leagues before an arm injury ended his career. He still is an active snow and water ski enthusiast and loves camping and flyfishing. Spending time with his two children's families and the four grandchildren are a high priority for Tom as he lives his life with passion!

Marc A. Ecker, Ph.D. – Partner, Chief Financial Officer

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) and served as the Interim Executive Director for 2021-22. 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 a sitting Executive Member 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 – Partner

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. He has been honored as ACSA Regions 1,2,3 Superintendent of the Year and Administrator of the year as well as being named Los Altos of the Year in 2006. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

Juan Garza – Partner

Juan has been a superintendent for 15 years in Kings Canyon Unified School District, a district that has 22 schools. He has worked 27 years in the district that serves Reedley, Orange Cove and the communities of Navelencia, Squaw Valley, Dunlap and Miramonte. He was inducted into the Reedley Chamber of Commerce Hall of Fame, has been awarded Administrator of the Year, and has been a featured keynote speaker in various workshops on topics such as *Building Effective Governance Teams*, and *Working With the Members of your Rural Communities*, sponsored by Lozano Smith. Mr. Garza is also an active member of the California Association of Latino Superintendents and Administrators, (CALSA), where he has presented as part of a panel featured in CALSA workshops.

Jacqueline Horejs, Ed.D. – Partner

Dr. Horejs is a seasoned educational professional with a firm belief that leadership matters for student, school, and district success. Her professional experiences over 40 years in education have provided her with a multi-faceted skill set and understanding of the needs of educational leadership. Dr. Horejs successfully served nine years as the Superintendent of Union School District, in San Jose, CA. Prior to serving as Superintendent, she worked as the Director of Instructional Services at the County Office and the Regional Director for the Statewide System of School Support, and later as the Assistant Superintendent for Educational Services in Gilroy Unified School District. In those roles she has led initiatives for organizational alignment, strategic planning, community engagement, multi-tiered systems for student support, and school improvement. She has served as the Interim Director of the Preliminary Administrative Credential Program at the Santa Clara County Office of Education and is currently a coach and instructor in the Tier 2 Clear Administrative Credential Program. She holds a Bachelor of Arts Degree from the University of Illinois, a Masters in Educational Administration from San Jose State, and a Doctorate in Educational Leadership from USC. Since retiring in 2015, she has been conducting Executive Searches, facilitating Governance Workshops and Superintendent Evaluations, and coaching Superintendents and other administrators.

Peggy Lynch, Ed.D. – Partner

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of



more than 60 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.*

Dennis M. Smith, Ed.D. – Partner, Search Lead

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (27,000 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 70 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as President of the Southern California Superintendents' Association. Dennis received his Bachelor of Arts and Master's Degree from Arizona State University and his Doctorate from the University of Arizona. In addition, he has been an adjunct faculty member at California State University, Fullerton. Dennis has spoken at the local, state, and national level on Board- Superintendent relations, Strategic Planning and Goal Setting and Organizational Management. He has consulted with school districts across the United States assisting school boards with superintendent searches and conducting workshops, trainings and organizational efficiency audits.

Rich Thome – Partner

Rich Thome served as Superintendent of the South Bay Union and Cardiff School Districts in San Diego County, as well as the Assistant Superintendent of Technology and Human Resources at the San Diego County Office of Education. He is a Partner in Leadership Associates, a Superintendent Search Firm. In this capacity he has conducted over 120 executive searches and 195 Board Workshops since 2003. Rich joined Leadership Associates and has been in the firm for 17 years, joining in 2006 as a search consultant. He also served as Director, Professional Learning in the Mobile Technology Learning Center (MTLC), a research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. He, prior to that assignment, served as Director Educational Leadership Development Center at the University. In addition, Rich was an Executive Coach for Pivot Learning Partners in Los Angeles and San Diego Counties. Previously, he served for 23 years in the (now 49,974 enrollment) Capistrano Unified School District as Assistant Superintendent in charge of 29 elementary schools, Director, Elementary Education Coordinator, Research and Instructional Technology, Elementary Principal and High School Teacher. Prior to that Rich served as a Middle School Teacher in the Pasadena Unified School District. He received his bachelor's degree from California State University, Los Angeles, and his master's from Pepperdine University. He is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich was awarded the prestigious Ohtli Award, awarded rarely by the Government of Mexico in 2008 for his 40 years of services to the Latino Community. In 2007 Rich was awarded the Excellence in Leadership Award by the University of California, San Diego and in 2006 he was awarded the Willie Velasquez Community Service Award. He has received the Honorary Service Award from the California Congress of Parents, Teachers and Students, and the Orange County Hispanic Educator of the Year Award.

Sandy Sánchez Thorstenson – Partner

Sandy Sánchez 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, Ms. Sánchez 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. Ms. Sánchez 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 and currently serves on the board of directors of the Soroptimist International of Whittier.



EXECUTIVE SUMMARY

Leadership Associates is a California executive search firm with a national reach that 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. We have developed processes that lead to the successful hiring of candidates who meet the profile developed by the Board. These processes include conducting extensive recruiting and thorough reference checking and working with the Board throughout the interview and contract approval process.
3. Our partners are all active educators and former superintendents with successful leadership experiences in a variety of districts and in state and national organizations.
4. We understand and respect the factors that contribute to a highly effective governance team. We are committed to helping Board members work collaboratively throughout the various phases 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. We are proud of the high-quality leaders we have been able to bring forward for Board consideration in previous searches.
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 strongly believe Leadership Associates is the right match for your 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.



QUALIFICATION STATEMENT

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 650 executive searches in California since 1996. We have 16 partners, all active educators and former, successful California superintendents who reside throughout the state – north, south, and central valley. While we are dedicated to California school districts, we have networks throughout the country and have assisted many school boards in finding top candidates from outside the state.

A few other facts about the partners of the firm:

- All keep superintendent searches as their core work
- All have national and state-wide networks and alliances including Council of the Great City Schools; Urban Education Dialogue (UED); Association of California School Administrators (ACSA); California Association of Latino Superintendents and Administrators (CALSA); California Association of African-American School Administrators (CAAASA); California Collaborative for District Reform; (CCDR); American Association of School Administrators (AASA); Suburban School Superintendents; and California City School Superintendents
- All belong to organizations which include top and emerging leaders
- Three were California State Superintendent of the Year
- Three chaired ACSA's California state superintendent's committee; two were ACSA presidents
- A number are bilingual in Spanish
- Many facilitate workshops in districts throughout the state: board/superintendent relations; board/superintendent protocols; strategic planning; superintendent evaluations; team building; and instructional improvement. Several coach and mentor superintendents and other top district leaders
- Most have taught or are currently teaching leadership courses at universities
- All have received awards for educational and community work, regionally, statewide, and nationally; and one was honored by the Mexican Consulate
- Partners have authored or co-authored the following publications: A Practical Guide to Effective School Board Meetings; Eight at the Top; Superintendent-School Board Practices; and The Superintendent's Planner
- District/Board Executive Assistant and administrative staff receive ongoing support and guidance from highly qualified personnel with parallel district office experience



REFERENCES

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH

	DISTRICT NAME AND ADDRESS	CONTACT NAME	TITLE	PHONE	EMAIL
1	ABC USD 16700 Norwalk Blvd. Cerritos, CA 90703	Soo Yoo	Board President (at time of search)	(562) 926-5566	soo.yoo@abcusd.us
2	Mt. Diablo USD 1936 Carlotta Drive Concord, CA 94519	Cherise Khaund	Board President (at time of search)	(925) 682-8000 x4541	khaundc@mdusd.org
3	Folsom-Cordova USD 1965 Birkmont Drive Rancho Cordova, CA 95742	Zak Ford	Board President (at time of search)	(916) 813-6658	zford@fcusd.org
4	Fontana USD 9680 Citrus Ave Fontana, CA 92335	Marcelino Serna	Board President	(909) 600-9027	Marcelino.Serna@fUSD.net
5	Gilroy USD 7810 Arroyo Cir Gilroy, CA 95020	Linda Pecino	Board President	(669) 205-4000	Linda.pecino@gilroyunified.org
6	San Rafael City Schools 310 Nova Albion Wy San Rafael, CA 94903	Linda Jackson	Board President (at time of search)	(415) 492-3200	ljackson@srcs.org



DIVERSITY AND EQUITY STATEMENT

Our Commitment

We are committed to meeting the needs of California's diverse student populations. Each partner shares a core belief that every student is entitled to a world class education and the opportunity to be served at the highest level of quality leadership. We are driven by a culture, a set of beliefs and core values that place equity at the center of our work.

Diversity Policy

We value diversity in the workforce and embrace the cultural and demographic dimensions of our state and country. We work diligently to recruit candidates who represent the range of personal and professional backgrounds, and experiences and perspectives that arise from a variety of cultures and circumstances. This includes persons of varying age, ethnicity, gender, disability, race, sexual orientation, gender identity, religion, political affiliation, socioeconomic and family status, and geographic region.

Equity

We work diligently to ensure equitable search practices for every candidate who is interested in the positions we are working to fill and the school districts we are partnering with. Our diverse partners consistently succeed at providing support for all candidates regardless of race, ethnicity, socioeconomic status, language, gender identity, disability, religion, family or marital status, or political affiliation. It is imperative to us that we involve all voices, cultures and perspectives of the diverse students, families and communities in our partner districts.



EXECUTIVE SEARCHES 2013-CURRENT

STATEWIDE

- | | |
|--|--------------------|
| 1. Association of California School Administrators (ACSA) | Executive Director |
| 2. California Collaborative for Educational Excellence (CCEE) | Executive Director |
| 3. California County Superintendents Educational Services Association (CCSESA) | Executive Director |
| 4. WestEd/GATES | Executive Director |

POSITION: COUNTY OFFICE OF EDUCATION SUPERINTENDENT

- | | |
|------------------------------|----------------|
| 1. Los Angeles County – 2011 | 1,500,000+ ADA |
| 2. Santa Clara County – 2008 | 275,000+ ADA |
| 3. Ventura County – 2021 | 135,312 ADA |

POSITION: SCHOOL DISTRICT SUPERINTENDENT (2013-Current)

<u>District</u>	<u>County</u>	<u>ADA</u>
1. Fresno USD	Fresno	73,356
2. San Francisco USD	San Francisco	58,865
3. Santa Ana USD	Orange	57,410
4. Capistrano USD	Orange	53,833
5. Corona-Norco USD	Riverside	53,148
6. Sacramento City USD	Sacramento	47,616
7. Oakland USD	Alameda	46,486
8. Riverside USD	Riverside	42,560
9. Stockton USD	San Joaquin	40,984
10. Fontana USD	San Bernardino	40,374
11. San Jose USD	Santa Clara	32,938
12. Anaheim Union HSD	Orange	32,085
13. San Ramon Valley USD	Contra Costa	31,900
14. Mt. Diablo USD	Contra Costa	31,013
15. West Contra Costa USD	Contra Costa	30,596
16. Bakersfield City SD	Kern	30,262
17. Modesto City Schools	Stanislaus	30,718
18. Orange USD	Orange	28,522
19. Saddleback Valley USD	Orange	27,803
20. East Side UHSD	Santa Clara	26,537
21. Rialto USD	San Bernardino	26,468
22. Placentia-Yorba Linda USD	Orange	25,821
23. Palm Springs USD	Riverside	23,332
24. Murrieta Valley JUSD	Riverside	22,950
25. Antelope Valley UHSD	Los Angeles	22,792
26. Tustin USD	Orange	22,761
27. Grossmont UHSD	San Diego	22,021
28. Lake Elsinore USD	Riverside	22,000
29. Hemet USD	Riverside	21,977
30. Pajaro Valley USD	Santa Cruz	20,438
31. Folsom-Cordova USD	Sacramento	19,865
32. Anaheim City SD	Orange	19,312
33. Alvorad USD	Riverside	19,255
34. Coachella Valley USD	Riverside	18,861
35. Riverbank USD	Stanislaus	18,750
36. Newport-Mesa USD	Orange	18,559
37. Antioch USD	Contra Costa	18,352
38. Panama-Buena Vista Union SD	Kern	18,250
39. Ventura USD	Ventura	17,430
40. Santa Rosa City Schools	Sonoma	16,700
41. Santa Maria-Bonita SD	Santa Barbara	16,665
42. Oxnard SD	Ventura	16,533
43. Burbank USD	Los Angeles	16,207
44. Cajon Valley Union SD	San Diego	16,059
45. Paramount USD	Los Angeles	15,681
46. Santa Clara USD	Santa Clara	15,509
47. Lancaster SD	Los Angeles	14,743
48. Walnut Valley USD	Los Angeles	14,658

<u>District</u>	<u>County</u>	<u>ADA</u>
49. Vallejo City USD	Solano	14,554
50. West Covina USD	Los Angeles	14,402
51. Fullerton SD	Orange	13,661
52. Etiwanda SD	San Bernardino	13,478
53. Livermore Valley USD	Alameda	14,305
54. Vacaville USD	Solano	12,561
55. Inglewood USD	Los Angeles	12,570
56. Acton-Agua Dulce USD	Los Angeles	12,523
57. San Dieguito UHSD	San Diego	12,485
58. Palo Alto USD	Santa Clara	12,357
59. Natomas USD	Sacramento	12,300
60. Metropolitan Education	San Jose	12,000
61. Oak Grove SD	Santa Clara	11,800
62. Upland USD	San Bernardino	11,665
63. Victor ESD	San Bernardino	11,531
64. San Lorenzo USD	Alameda	11,530
65. Evergreen School District	Santa Clara	11,385
66. Alameda USD	Alameda	11,299
67. Franklin-McKinley SD	Santa Clara	11,269
68. Merced City USD	Merced	11,009
69. Lucia Mar USD	San Luis Obispo	10,710
70. Pittsburg USD	Contra Costa	10,560
71. Azusa USD	Los Angeles	10,518
72. Berkeley USD	Alameda	10,340
73. Sequoia UHSD	San Mateo	10,238
74. Dublin USD	Alameda	10,000
75. Roseville City ESD	Placer	9,943
76. Los Alamitos USD	Orange	9,833
77. San Mateo Union HSD	San Mateo	9,760
78. Woodland JUSD	Yolo	9,658
79. Yucaipa---Calimesa Joint USD	San Bernardino	9,655
80. Ocean View SD	Orange	9,461
81. Westminster SD	Orange	9,264
82. Morgan Hill USD	Santa Clara	9,022
83. Santa Maria JUHSD	Santa Barbara	7,633
84. East Whittier City ESD	Los Angeles	8,829
85. Davis Jt. USD	Yolo	8,626
86. Sylvan Union SD	Stanislaus	8,261
87. Novato USD	Marin	8,078
88. El Rancho USD	Los Angeles	7,985
89. South Bay UESD	San Diego	7,682
90. San Rafael City Schools	Marin	7,200
91. Santa Cruz City Schools	Santa Cruz	7,092
92. Newhall SD	Santa Clarita	6,831
93. Fountain Valley USD	Orange	6,337
94. Newark USD	Alameda	6,294
95. Selma USD	Fresno	6,258
96. Lennox SD	Los Angeles	6,247
97. Ukiah USD	Mendocino	6,214
98. Brea Olinda USD	Orange	6,085
99. Patterson JUSD	Patterson	6,012
100. Newhall SD	Los Angeles	5,920
101. Alta Loma SD	San Bernardino	5,900
102. Santa Paula USD	Ventura	5,454
103. Monrovia USD	Los Angeles	5,404
104. Kerman USD	Fresno	5,310
105. Orcutt Union ESD	Santa Barbara	5,087
106. Oakley Union SD	Contra Costa	4,871
107. Buena Park SD	Orange	4,684
108. Moreland SD	Santa Clara	4,670
109. Charter Oak USD	Los Angeles	4,581
110. Sonoma Valley USD	Sonoma	4,564
111. Oak Park USD	Ventura	4,527

<u>District</u>	<u>County</u>	<u>ADA</u>
112. Benicia USD	Solano	4,526
113. San Lorenzo Valley USD	Santa Cruz	4,444
114. Belmont-Redwood Shores SD	San Mateo	4,308
115. Wiseburn USD	Los Angeles	4,301
116. Ravenswood City SD	San Mateo	4,296
117. Paradise USD	Butte	4,261
118. Duarte USD	Los Angeles	4,247
119. Martinez USD	Contra Costa	4,156
120. Lindsay USD	Tulare	4,150
121. Central UHSD	Imperial	4,104
122. Cypress SD	Orange	4,000
123. Brawley ESD	Imperial	3,980
124. Eureka City Schools	Humboldt	3,884
125. Lake Tahoe USD	El Dorado	3,872
126. Enterprise ESD	Shasta	3,846
127. Hanford Joint Union HSD	Kings	3,802
128. Amador County USD	Amador	3,829
129. Lemon Grove SD	San Diego	3,797
130. Mountain View-Los Altos UHSD	Santa Clara	3,753
131. Fillmore USD	Ventura	3,734
132. Goleta Union SD	Santa Barbara	3,718
133. Del Norte County USD	Del Norte	3,591
134. Los Altos SD	Santa Clara	3,576
135. Cabrillo USD	San Mateo	3,357
136. Cambrian SD	Santa Clara	3,349
137. Lafayette SD	Contra Costa	3,261
138. Corcoran USD	Kings	3,257
139. Pacifica SD	San Mateo	3,150
140. San Marino USD	Los Angeles	3,146
141. Mill Valley Elementary SD	Marin	3,086
142. Exeter Public Schools	Tulare	3,000
143. Standard ESD	Kern	2,979
144. South Whittier ESD	Los Angeles	2,918
145. San Bruno Park ESD	San Mateo	2,785
146. Oroville City ESD	Butte	2,696
147. Castaic Union SD	Los Angeles	2,568
148. Fowler USD	Fresno	2,562
149. Scotts Valley USD	Santa Cruz	2,482
150. Jefferson SD	San Joaquin	2,477
151. Carmel USD	Monterey	2,468
152. Farmersville USD	Tulare	2,463
153. Bear Valley USD	San Bernardino	2,453
154. Galt JUHSD	Sacramento	2,287
155. Lammersville JUSD	San Joaquin	2,200
156. Chowchilla ESD	Madera	2,193
157. Woodlake USD	Tulare	2,192
158. Red Bluff Union ESD	Tehama	2,178
159. Plumas USD	Plumas	2,130
160. Fort Bragg USD	Mendocino	1,917
161. Willits USD	Mendocino	1,907
162. Mariposa County USD	Mariposa	1,816
163. Byron Union SD	Contra Costa	1,686
164. Reed Union SD	Marin	1,556
165. Larkspur-Corte Madera SD	Marin	1,523
166. Colusa USD	Colusa	1,450
167. Chawanakee USD	Madera	1,423
168. Williams USD	Colusa	1,375
169. Las Lomitas ESD	San Mateo	1,336
170. Sierra USD	Fresno	1,323
171. Wilsona SD	Los Angeles	1,315
172. St. Helena USD	Napa	1,295
173. Guadalupe Union SD	Santa Barbara	1,280
174. Fall River JUSD	Shasta	1,209

<u>District</u>	<u>County</u>	<u>ADA</u>
175. Kentfield SD	Marin	1,177
176. Chowchilla UHSD	Madera	1,103
177. Taft UHSD	Kern	1,045
178. University Preparatory School	Shasta	900
179. Bass Lake JUSD	Madera	891
180. Lassen UHSD	Lassen	825
181. Banta ESD	San Joaquin	770
182. Wheatland UHSD	Yuba	739
183. Rancho Santa Fe SD	San Diego	700
184. Emery USD	Alameda	687
185. San Pasqual Valley USD	Imperial	654
186. Summerville UHSD	Tuolumne	624
187. Solvang SD	Santa Barbara	607
188. Shoreline USD	Marin	504
189. Fort Sage USD	Lassen	483
190. Calaveras COE	Calavera	450
191. Eastern Sierra USD	Mono	417
192. Le Grand Union ESD	Merced	401
193. Kings River Union ESD	Tulare	476
194. Foresthill Union SD	Placer	396
195. Janesville Union SD	Lassen	386
196. Alview-Dairyland Union SD	Madera	367
197. Butte Valley USD	Siskiyou	276
198. Clay Joint ESD	Fresno	250
199. Westwood USD	Lassen	189
200. Ballard SD	Santa Barbara	143
201. McKittrick ESD	Kern	80
202. Alpine County USD	Alpine	75

POSITION: EXECUTIVE DIRECTOR/DIRECTOR

203. Amethod Public Schools (Charter)	Alameda/Contra Costa
204. Baldy View ROP	San Bernardino
205. Birmingham Community Charter HS	Los Angeles
206. Clayton Valley Charter High School	Contra Costa
207. Coastline ROP	Orange
208. East San Gabriel Valley SELPA	Los Angeles
209. Oxford Preparatory Academy	Orange
210. River Charter School	Sac/Yolo
211. San Diego COE	San Diego
212. San Ramon Valley SELPA	Contra Costa
213. So. Orange County SELPA	Orange
214. West End SELPA, San Bernardino COE	San Bernardino
215. West San Gabriel Valley SELPA	Los Angeles



BOARD COMMENDATIONS

Bass Lake JUESD: Thank you Sally. I cannot express enough how grateful I am that we chose you and Leadership Associates for this process. The confidence I felt, throughout this process, in your ability to guide us, was tremendous. The step-by-step process that you led us through was focused, intentional, and direct. It was a pleasure to be a part of something that was so well thought out, with excellence as your minimum standard. You are so good at what you do! I wish you continued success for all the districts that you work with in the future. They need you whether they know it or not!

Benicia USD: It is with immense gratitude, that we send you this note of appreciation for all that Leadership Associates did in supporting us with a successful Superintendent search. The care and concern for BUSD as well as the Benicia community was evident in the steps that you took as well as in the thoughtful process you engaged all stakeholders in to express their hopes for the District in our next Superintendent. On behalf of the BUSD Governing Board and the entire Benicia Unified School District, we thank you for matching us with the best candidate. We are excited about the state of the District and the direction of things to come.

Carmel USD: The entire process was extremely smooth and conducted with utmost respect for all parties involved. We were on time, and communication was regular, open and transparent. The most difficult part of the process was at the end of the interview process. The board had to choose only one candidate from the experienced pool of multiple candidates presented by Leadership Associates. We consider the superintendent search led by Leadership Associates an absolute success. The individual we hired is the perfect match for our students, staff and community.

CCSESA: It was a pleasure to have your outstanding team provide such an important service to this process! This is a critical position, and your team did a superb job in helping to ensure the process was collaborative, transparent and resulted in a selection of a top-notch person!"

Coachella Valley USD: I know it's easy to say "it's your job", but you and your group have always gone above and beyond for our district and we sincerely appreciate it.

Corcoran USD: We greatly appreciate how poised and supportive [Juan Garza] was with all our efforts as he guided us through the search. Working with [Leadership Associates] has been very enjoyable and we learned a lot.

East San Gabriel Valley SELPA: Thank you for assisting in getting us a great leader. He is collaborative, understanding of every member, parent's needs, inclusive of students, proactive, compassionate, and caring."

East Whittier City SD: Thank you for appointing Sandy Sanchez Thorstenson and Marc Ecker to supervise and coordinate our superintendent search. They ran the interviews like clockwork with plenty of time for reflection of each candidate at the end of the interview. We were presented with six outstanding candidates. It was challenging to decide which of them was the best fit for our District. We are confident that our choice of superintendent is that best choice. We were delighted to work with Sandy and Marc and will gladly recommend them as the premier search team.

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

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

Evergreen SD: Leadership Associates did an excellent job in our recent Superintendent Search process. This was the first time that our district has ever engaged in an external search process, and I found it much more rewarding and less stressful because of the superb support of Eric and Fred.

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

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

Fountain Valley SD: Dennis and Peggy - We are so grateful for your service. Thank you for helping to make our lights shine strong in Fountain Valley!

Fowler USD: Leadership Associates was completely thorough from their initial proposal to the Board, through the actual hiring of a successful superintendent candidate. The communication to all members of the Board and the designated District contact was exemplary throughout the process. Parents/community members/staff felt very comfortable sharing with Leadership Associates representatives the various traits valued in our next Superintendent. The on-line survey they utilized was especially helpful for members of the community and parents, as it gave them an opportunity for their voice to be heard if they were unavailable to schedule a meeting in person.

Fremont USD: Thank you all so much for your support and diligent work finding a great pool of candidates and helping us to select the best of the best.

Fresno USD: Thank you to Leadership Associates for all your assistance in the process. As you know, only two of us were on the Board the last time a Superintendent was hired and at that time, there was no search process. It was invaluable to have the assistance of a team that has experience in the selection of a Superintendent.

Fullerton SD: Our Board was especially appreciative of the professional manner in which Leadership Associates reached out in a meaningful way to the educational community and listened to the direction of the Board of Trustees. I highly recommend Leadership Associates to any board seeking to conduct a thorough and in-depth superintendent recruitment and selection process.

Irvine USD: With an unprecedented number of superintendent vacancies across the state, we were impressed with Leadership Associates' ability to attract highly qualified candidates, due in no small part to their excellent reputation and exceptional attention to confidentiality.

Kentfield: Each of us is grateful for your great work on the search for Kentfield. We could not be more pleased by the thoughtful and extremely thorough search process. We particularly appreciated your flexibility, responsiveness, and creativity with the search over the past several weeks. Quite simply, you never skipped a beat with the search process, despite a global pandemic looming in the background. If there is ever a potential client on the fence about hiring you guys have them call me. They would be lucky to have you guys in their corner.

Lake Elsinore USD: Thank you all so much for your guidance and expertise in leading the search. It will be very difficult to replace our superintendent. However, we are certainly headed down the right path in Lake Elsinore Unified thanks to your support!

Lucia Mar USD: Thank you to Leadership Associates, especially Phil Quon and Fred Van Leuven, for leading our district through a professional and successful superintendent search. Your pre-search activities, outreach, screening, organization of materials and leadership was outstanding. We found our new superintendent and are confident we found a perfect fit."

Mt. Pleasant ESD: At every step of the way we found the services of the staff at Leadership Associates to be responsive to the specific needs of our district and the rapidly changing circumstances surrounding the [COVID-19] crisis. I highly recommend the services of Leadership Associates and specifically Eric Andrew and David Verdugo.

Newport Mesa USD: Thank you and your team for helping us with our search to ultimately find our new Superintendent! We were all impressed with the timeliness and thoroughness of the search performed by Leadership Associates. Your initial schedule was followed to the day, and we are all so appreciative of your professionalism in ultimately bringing Wes [Smith] to NMUSD. Additionally, your support in finding our Interim superintendent made the perfect addition to NMUSD for the 2-month bridge. The transition was seamless!

Oceanside USD: Their work with our administrative staff, our teachers, classified staff, and our community groups was excellent. They received praise for this work throughout our community. Our principals and central office staff were treated with utmost respect, and they were very complimentary of the professionalism of this search firm.

Palo Alto USD: We recognize the selection of a superintendent is the most important decision we make as a school board, Leadership Associates designed an effective process to get to know us and to meet our needs - including recruiting candidates who were not looking for a new position. Not only does Leadership Associates bring an incredible wealth of experience and competence to the task, they also are so personally engaging and professional that it makes the process most pleasant.

Panama-Buena Vista SD: Leadership Associates is well connected throughout the state. The process from beginning to end was well communicated and very organized. Leadership Associates is literally a "who's who" of educators in the state. A successful superintendent search and hiring was our goal and Leadership Associates delivered!

Placentia-Yorba Linda USD: Your diligence, patience, professionalism, and the confidential manner in which you conducted the search were exemplary. Indeed, one would be hard pressed to find a team to match the level of expertise and recognition within the professional learning community which you so ably employed on our behalf.

Plumas USD: I thoroughly enjoyed working with Rich and Tom. They provided guidance throughout the entire process. Both were committed to ensuring we had the most qualified candidates based on our district's needs. They took the time to understand the needs of the district, board, communities, and parents. They helped us to trust the process and our decision-making process. Selecting a superintendent is one of the most important decisions boards make. I was happy to have Rich and Tom offering support, encouragement, and advice.

Santa Maria JUHSD: Great candidates! Appreciate your thorough vetting; best work yet for this district. My first-choice search firm does it again!!

Standard SD: Leadership Associates had regular communications with the board and dependably delivered on each step in our timeline. Trust in the process was a result of Leadership Associates' extensive experience and in the actions and care.... while respecting the role of trustees as the decision makers of the district.

Summerville JUHSD: Thank you for all the work you and the firm have completed. We know we were demanding because we have a really involved community. But you just moved forward and got the job done Great work!! We will highly recommend your service to any District in our County.

Tustin USD: I cannot say enough good things about the work that Leadership Associates performed for us. The most recent time was in the fall of 2020 when we needed to fill our Superintendency given the retirement plans of our previous Superintendent. We are very pleased with Dr. Mark Johnson, our new Superintendent, who is still with us. I expect he will be with us for about 10 years, as was our previous Superintendent, Dr. Greg Franklin. You cannot go wrong working with Leadership Associates. They are so professional, and people who would not risk asking about your position WILL seek them out for information because they are known to be of such integrity and reputation. Of course, the Board must do their work as well – but if they do so in partnership with Leadership Associates and were other than 100% satisfied at the end, I would personally be shocked. They are that good.

University Preparatory School: Leadership Associates was constantly available to us. Leadership Associates brought much more than guidance and experience; (the consultant) brought genuine kindness, creative vision and integrity that underpin all great endeavors. I highly recommend Leadership Associates.

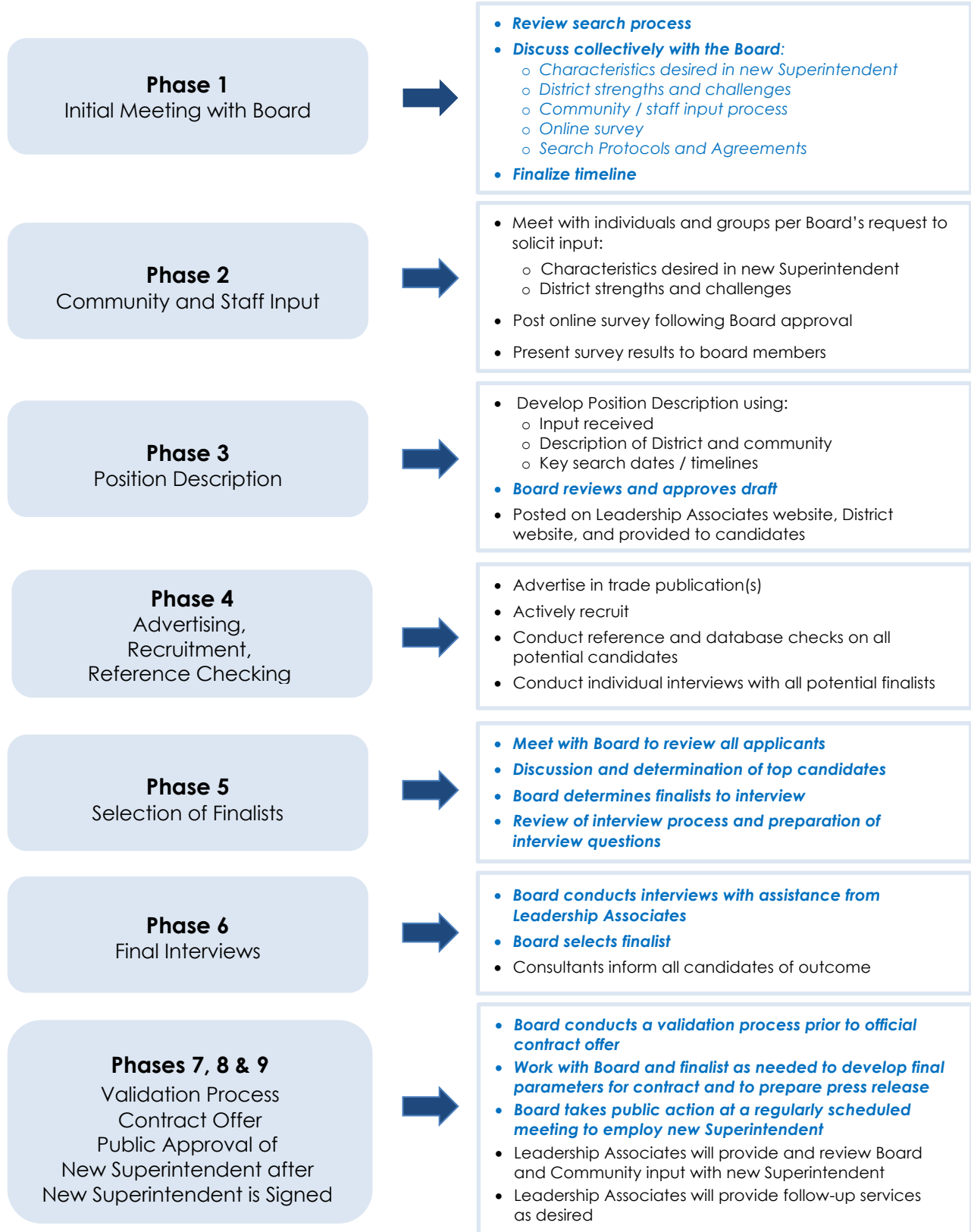
Walnut Valley USD: Not only are they consummate professionals, but their process in conducting the search was impeccable – from soliciting input from the Board and community members to developing personal and professional profiles, to screening the applicants to recommending the final candidates, to helping the Board finalize the main hiring points for our new superintendent.

Wiseburn SD: Thank you for your thoughtful leadership and guidance in the process. It was an absolute pleasure meeting you, getting to know you and working with you. I think we made two excellent choices in Leadership Associates and Dr. Blake Silvers.



SUPERINTENDENT SEARCH PROCESS FLOW CHART

Note: *Blue italicized text* indicates Board Participation





SEARCH PROCESS PLAN

Leadership Associates has developed criteria to provide the Board of Education with a 9-phase process for selecting its next superintendent. The following is a brief description of each of the key steps of the search process, including identifying key personnel in each phase. The Board's designated administrative support staff will be guided and supported by our highly experienced executive assistant and provided with guidelines, templates, samples, checklists, and personal communication throughout the entire process.

**Indicates meetings with the Board*

Phase 1: **Initial Meeting with the Board* (Key Personnel: Consultants, Board, LA / district admin support; district I.T. support)

Leadership Associates will confer with the Board upon our selection to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services, including: the characteristics the Board is seeking in the next superintendent; District strengths and challenges; the process for engaging groups and individuals in the search process; approval of an official 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. We will meet with Board members individually, in person or by phone to learn each member's unique perspective. We will also be prepared to suggest criteria for consideration based on our own professional expertise. Immediately following the initial meeting, we will work with district staff to create a Superintendent Search webpage on the district's website where members of the community can receive updates on the search process, including access to online surveys.

Phase 2: Community and Staff Input (Key Personnel: Consultants, LA / district admin. support)

After working with the Board to develop a community engagement plan, we confer with the individuals and groups you request (community, staff, students). We share the search process, timeline, answer questions, and solicit input regarding the desired qualities, characteristics, background, and experiences of the new superintendent, and we discuss 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, but 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 in various languages 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 (Key Personnel: Consultants, LA / district admin. support)

The Position Description will clearly state the criteria which applicants for the position should address in completing their application. It will also reflect input received 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 posted on our website, distributed widely, and can be posted on the District's website.

Phase 4: Advertising, Recruitment, Reference Checking (Key Personnel: Consultants)

After our sessions 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 (Key Personnel: Consultants, Board, LA / district admin. support)

At this Closed Session 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 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 developed by consultants and assist the Board in finalizing them with a focus on the specific needs of the District as gleaned from the input process and reflected in the position description. 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 (Key Personnel: Consultants, Board, LA / district admin. support)

The Board conducts the interviews in Closed Session 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: Validation Process; Contract (Key Personnel: Consultants, Board, LA / district admin. support)

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

Phase 8: Public Approval of Contract (Key Personnel: Consultants, Board, district admin. support)

Following the validation process, 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 (Key Personnel: Consultants, New Superintendent)

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.



PROPOSED TIMELINE

(Flexible based on Board direction)

Sacramento City Unified School District Superintendent Search

Note: *Blue italicized text* indicates Board Participation

AUGUST 2023 Preliminary Phase	August 8	District receives proposals
	August 17	<i>Proposal Presentations / Board Selects Firm</i>
AUGUST-SEPTEMBER 2023 Community Engagement	by August 28 (Special Mtg)	<i>Initial Meeting with the Board; Board determines characteristics, skills & qualities desired in new superintendent; publicly announces timeline and procedures (Open and Closed Session; approx 3 hrs total)</i>
	September 6-18	Online survey dates
	week of September 1	Consultants confer with staff and community designated by the Board to receive input
AUGUST-OCTOBER 2023 Advertisement and Recruitment	August-October	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	September 18 and October 2	Advertising and active recruitment; Ad appears in <u>EdCal</u> , (Two consecutive publications)
	October 16, 2023 5:00 PM	Deadline for applications
OCTOBER-NOVEMBER 2023 Interviews and Selection	Sept-October	Consultants complete comprehensive reference and background checks on applicants
	Week of November 6 special meeting	<i>Board confers with consultants, reviews all applications and selects candidates to be interviewed (Closed Session; approx 3 hours)</i>
	December 1-2 (Special Mtg)	<i>Board interviews candidates; selects finalist(s) (Closed Session; all-day meeting)</i>
DECEMBER 2023 Contract Approval	by December 15	<i>Board completes the validation process of the leading candidate and makes final determination</i>
	December 21	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
JANUARY 2024 Start Date	January 1, 2024 (or as mutually agreed)	New superintendent begins

REQUEST FOR PROPOSAL PRICE FORM

Sacramento City Unified School District
5735 47th Avenue
Sacramento, CA 95824

RE: Request for Proposal – Superintendent Search

Dear Members of the Board of Trustees:

The undersigned, doing business under the firm name of Leadership Associates, having carefully examined the Notice to Proposers, the Instructions, and the Specifications for the proposed request for proposal, proposes to perform the contract, including all of its component parts, and to furnish all services, and taxes called for by them for the entire order, as follows:

Amount of proposal \$36,500 plus travel expenses not to exceed \$2,500

SUBMITTED BY:

Leadership Associates

COMPANY

449 W. Foothill Blvd., #427

ADDRESS



SIGNATURE

Glendora, CA 91741

CITY/STATE/ZIP

Betty Hall

PLEASE TYPE OR PRINT NAME

Administrative, Fiscal Services

TITLE

August 8, 2023

DATE

(760) 771-4277

PHONE



FEE AND SUMMARY OF SERVICES

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH

TOTAL FEE TO CONDUCT SEARCH: \$36,500 (plus travel expenses not to exceed \$2,500)

This fee includes:

- All expenses incurred by consultants
- All meetings with the Board
- Development and posting of the position description announcing the position
- Cost of advertising in EdCal (Two consecutive publications)
- Acceptance of applications and responding to all inquiries regarding the position
- Recruitment of candidates and extensive background checks
- Gathering of community and staff input and providing Board with a written report, including online survey
- Coordination of logistics of the search:
 - scheduling appointments
 - notification of unsuccessful candidates
 - scheduling community visit
- Assisting in the development of interview questions and supporting the Board with the interview process
- Assisting the Board's administrative assistant throughout the process with templates, online posting updates and sample agenda language
- Acting as an advisor to the Board of Education
- Assisting the new superintendent and Board through transition and community verification visit, if conducted
- The search is concluded upon Board selection of a Superintendent/Finalist

GUARANTEE

- Should the superintendent leave within two years, Leadership Associates will conduct a search targeted at identifying specific qualified candidates at no cost except for advertising costs and direct expenses provided the Board majority has remained the same and the Board has established first year annual goals for the superintendent.



SAMPLE SERVICES AGREEMENT

LEADERSHIP ASSOCIATES

www.leadershipassociates.org

449 W. Foothill Blvd., #427

Glendora, CA 91741

(916) 520-4951

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this ____ **day of August 2023** between **LEADERSHIP ASSOCIATES**, hereinafter called the Contractor, and **SACRAMENTO CITY UNIFIED SCHOOL DISTRICT**, hereinafter called the District.

The Contractor agrees to perform services for the District as follows:

The Contractor will conduct a Superintendent search, as delineated in the attached proposal.

The District agrees to pay the Contractor **THIRTY-SIX THOUSAND FIVE HUNDRED DOLLARS (\$36,500), plus travel expenses not to exceed \$2,500**, for services provided. Payment is to take place in two increments: **(1) \$18,250** upon completion of stakeholder input, and **(2), \$18,250 plus travel expenses not to exceed \$2,500** upon selection of a finalist. The Contractor will submit invoices to the District for each of the payment increments. Payments are due within 30 days of receipt of invoice.

**Remittance payable/forwarded to: Leadership Associates
Attn: Betty Hall
449 W. Foothill Blvd., #427
Glendora, CA 91741**

The Contractor is to perform the above services beginning August __, 2023.

Contractor agrees to hold harmless and indemnify the District, its officers, agents, and employees with respect to all damages, costs, expenses or claims, in law or in equity, arising or asserted because of injuries to or death of person or damage to, destruction, loss, or theft of property arising out of faulty performance of the services to be performed by Contractor hereunder.

It is expressly understood and agreed to by both parties hereto that the Contractor, while engaged in carrying out and complying with any of the terms and conditions of this contract, is an independent contractor and is not an officer, agent, or employee of the aforesaid District. Either party may terminate this agreement by providing the other party with ten (10) days written notice. Upon such termination, fees will be determined on a pro rata basis.

Leadership Associates does not participate in a California public pension system. Leadership Associates and the District understand that the work/services provided should not be considered creditable toward the STRS earnings limit as the work is not normally performed by employees of the District and requires less than 24 months (496 business days). REF. CA Education Code § 26135.7 (2014)

CONTRACTOR:
LEADERSHIP ASSOCIATES
Taxpayer ID#: 68-038 3653

DISTRICT:
SACRAMENTO CITY UNIFIED SCHOOL DISTRICT

By: _____

By: _____

Name: Betty Hall

Name: _____

Dept: Fiscal Services

Title: _____

Date: _____

Date: _____

NON-COLLUSION DECLARATION

State of California)
)
County of Santa Clara) ss.

I, Blanca Cavazos, being duly sworn, declare that I am a consultant with Leadership Associates, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this 3rd day of August 2023 at Bakersfield, California.



Signature

NON-COLLUSION DECLARATION

State of California)
) ss.
County of Madera)

I, Sally Frazier, being duly sworn, declare that I am a consultant with Leadership Associates, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this 3rd day of August 2023 at Madera, California.



Signature

NON-COLLUSION DECLARATION

State of California)
) ss.
County of Madera)

I, David Verdugo, being duly sworn, declare that I am a consultant with Leadership Associates, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this 3rd day of August 2023 at La Habra, California



Signature