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Trustee

**SPECIAL MEETING  
OF THE BOARD OF EDUCATION  
Virtual via Webex  
Tuesday, January 26, 2021  
5:00 PM**

**AGENDA**

- I. **CALL TO ORDER**
  - A. Roll Call
  - B. Pledge of Allegiance
- II. **ITEMS FROM THE PRESIDENT**
  - A. Approval of the Agenda
  - B. Announcements
- III. **SUPERINTENDENT SEARCH FIRM INTERVIEWS**
  - A. School Exec Connect
  - B. MASB
  - C. Michigan Leadership Institute/The Metropolitan Detroit Bureau of School Studies, Inc.
  - D. McPherson & Jacobson
  - E. Hazard, Young, Attea & Associates
  - F. Ray & Associates
- IV. **PUBLIC COMMENTS**
- V. **ADJOURNMENT**

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*\*PUBLIC COMMENTS is intended to provide individuals an opportunity to address the Board of Education. In the interest of fairness, the Board requests each speaker to limit his or her comments to three (3) minutes.*

*ANY PERSON with a disability who needs accommodation for participation in this meeting should contact the Superintendent's office at 248-489-3338 at least three (3) business days in advance of the meeting to request assistance.*

*ALL MEETINGS, with the exception of closed sessions, are open to the public. Regular Board of Education meetings and most pre-meetings of the Board of Education are cablecast live on TV10.*

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## Interview Schedule

January 26, 2021

5:10 pm	School Exec Connect	Dr. Kevin O'Mara Dr. Steven Matthews
5:50 pm	MASB	Mr. Rod Green
6:30 pm	MLI/Metro Bureau	Mr. John Silveri
7:10 pm	McPherson & Jacobson	Dr. Barry Carroll
7:50 pm	Hazard, Young, Attea & Associates	Ms. Alena Zachery-Ross
8:30 pm	Ray & Associates	Mr. Mike Collins, president Ms. Bridget Cheney, associate Mr. Craig Morris, associate

## Search Proposal

**Superintendent  
Farmington Public Schools  
Farmington, MI  
January 1, 2021**

### **Contents:**

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January 1, 2021

Kimberly Buckley  
Executive Assistant

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

Thank you for the opportunity to present an overview of SCHOOL EXEC CONNECT and the services we can provide for your superintendent search. Our firm prides itself on providing a quality search process that will result in a great leader for the Farmington Public Schools.

**SCHOOL EXEC CONNECT**, founded in 2004, is in its sixteenth year. Our diverse firm is comprised of more than 60 men and women who have been leaders in quality school districts throughout the country. We have an unusually high degree of success, which we attribute to the quality of our associates, the excellence of our protocols and our ability to find the best educational leaders who match the needs of our clients.

We define our success by the longevity of the leaders we place, our repeat services to client districts, and the positive and long-lasting relationships we establish with the boards with whom we work. We will understand your strengths and needs through conversations with the members of the Board, staff, and your entire constituency. Our recruitment and interview process aligned to this understanding will result in well-vetted, highly qualified candidates from which to make your selection of a new superintendent.

Thank you for considering our proposal for your superintendent search. We would enjoy working with you to achieve the mutual goal of finding great leadership for the students in the Farmington Public Schools.

Sincerely,

Kevin O'Mara Ed.D, President  
**SCHOOL EXEC CONNECT**

kevin.omara@schoolexecconnect.com  
708.516.0793

## **Consultants (see page 7)**

- Dr. Kevin J. O'Mara, President, [kevin.omara@schoolexeconnect.com](mailto:kevin.omara@schoolexeconnect.com) 708-516-0793
- Dr. Steven Matthews, Associate, [steve.matthews@schoolexeconnect.com](mailto:steve.matthews@schoolexeconnect.com) 517-488-5621

## **Proposed Timeline (see page 10)**

- Phase A: January 2021
- Phase B: January-February 2021
- Phase C: February-March 2021
- Phase D: March-April 2021

## **Costs (see page 14)**

- Consulting Fee: \$23,500
- Expenses not to exceed: \$7,500 *(expenses will be much lower if much of the activity is performed in a virtual setting)*

## **Our Guarantees (see page 15)**

Our understanding of the search services required and an overview of how **SCHOOL EXEC CONNECT** will provide these services.

- Mutually planning and tailoring your search process and timelines with the Board
- Working closely with your District staff members who assist the Board
- Preparing and providing written materials needed for the search process
- Assisting the Board in establishing criteria for a New Superintendent Profile including desired qualifications and leadership attributes
- Accepting applications on the **SCHOOL EXEC CONNECT** website with links to your District's website
- Using our national network to recruit candidates meeting the qualifications established by your Board
- Presenting a slate of qualified and well-vetted candidates to the Board
- Preparing the Board for first and second interviews
- Facilitating Board interviews at the Board's request
- Preparing Interview Committees for interviews
- Recommending an in-depth vetting process for the final candidate. Options include a site visit, Board reference calls, and a deep criminal background check.
- Assisting the Board with contract negotiation and compensation recommendations
- Communicating diligently with the Board and staff throughout the search
- Assisting with news releases announcing the new superintendent

Why is **SCHOOL EXEC CONNECT** so successful? We are one of the leading private search firms because we give school districts the personalized and individualized services each search deserves. Our firm is diverse, comprised of consultants who are knowledgeable and work closely together. We are large enough to have an exceptionally strong network, but are small enough to give your District the focus and attention your search needs.

**SCHOOL EXEC CONNECT** was founded 16 years ago and since inception, **SCHOOL EXEC CONNECT** has become one of the leading educational search firms in the Midwest with 60 consultants, more than 400 searches completed throughout the United States and a 96% placement success rate.

**SCHOOL EXEC CONNECT** specializes only in executive searches for school districts, private schools, charter schools, and consortium schools.

**Dr. Kevin O'Mara**, President, **SCHOOL EXEC CONNECT** is the retired Superintendent of Argo (IL) Public Schools and currently serves as Associate Professor in the Department of Leadership at Concordia University Chicago. Dr. O'Mara has led more than 30 searches in the United States.

**SCHOOL EXEC CONNECT** is a two-proprietor corporation founded in 2004 in Highland Park, Illinois. The corporation has never operated under another name and has been in continuous operation since 2004.

### **SCHOOL EXEC CONNECT's background and qualifications**

- School Exec Connect has two senior Partners, twelve Partners, seven Senior Associates, and forty-one Associates working out of eight states.
- Partners, Senior Associates and Associates working for our firm include retired superintendents, sitting superintendents, college professors, human resource directors, special education superintendents, and regional superintendents.
- Since 2004, we have successfully completed more than 400 superintendent searches for educational institutions.
- Our entire team of 60 consultants works closely together, supporting each search to find qualified candidates from across the country that match each district's needs.
- A hallmark of School Exec Connect is our Annual Training Conference where we train new associates, review our past year, improve our practices and get to know each other better to assure ongoing support and communication for our work together.
- We stay informed on legislative changes that affect school districts.
- All searches conducted by School Exec Connect have been completed on time and within budget.
- Our survey gives substantive information to Boards of Education about the various stakeholders' thinking. Given a large enough response, we can even report various subgroups' responses to a variety of topics important to your District.
- We have never been sued or refused any portion of payment by a district; nor have we ever had a search terminated.
- We provide complete written materials to support the needs of the District staff when preparing materials.

## FINANCIAL

- We provide exceptional training and written materials for Boards and constituents who are involved in candidate interviews.
- The thoroughness of our community engagement gives a Board valuable information throughout the process, while leaving the search decisions in the hands of the Board.
- **Our record of success is outstanding. More than 96% of our superintendent placements have been in good standing with their Boards after the first contract.**

**SCHOOL EXEC CONNECT** has a steady record of profit since its inception in 2004. We have never filed for bankruptcy, been sued or involved in any litigation with a client, school district, consultant, or candidate, had any search terminated nor been refused payment.

The consultants who will assist you with your search:

- **Dr. Kevin O'Mara, President, SCHOOL EXEC CONNECT**, has been with the firm for seven (7) years and has performed numerous searches throughout the Midwest. He is the retired Superintendent of Argo Community High School District and is currently Associate Professor in Educational Leadership at Concordia University Chicago teaching doctoral students and helping them pursue their principal and superintendent licensure credentials. He knows the key to great education leadership is to collaborate and let the people around him know that their dedication, knowledge and input are the key to enriching young lives. He is father to three (3) wonderful children, and husband to his wife of 30 years, Sharon. He is one of eight (8) children, and a son of two teachers. He owes his successes to the loving, supportive family he has, as well as to the truly talented people he has worked with during his career as an educator. He has served in public education for thirty (30) years as a teacher, Dean of Students, Principal, and Superintendent. Dr. O'Mara has had many accomplishments: United States State Department Fulbright Foundation candidate stationed to Argentina, Illinois High School Organization; President, Illinois Association of School Administrators Board of Directors; St. Ignatius College Prep President's Medal Awardee, and Rosary College Graduate of the Last Decade (GOLD) Awardee. He has a bachelor's degree in Mathematics from Dominican University, a master's degree in Public School Administration and a Doctorate in Educational Leadership, both from Concordia University Chicago.
- **Dr. Steven Matthews, Associate, SCHOOL EXEC CONNECT**, is currently the Superintendent of the Novi Community School District, where he has served since 2011. He previously served as the Superintendent in the Grand Ledge Public Schools and as the Director of Curriculum and Assessment in the Troy School District. He was an Assistant Professor at both the University of Michigan-Dearborn and Wayne State University. He has served as the President of the Michigan Association of School Superintendents and Administrators, serves on the Executive Board for the K-12 Alliance of Michigan, and represents Michigan on the Governing Council of the American Association of School Administrators. He has extensive contacts with school administrators throughout Michigan and the United States.

Complete resumes of the consultants will be sent upon request

# REFERENCE DISTRICTS

## **Grosse Pointe Public School System**

**Search Year: 2014-15**

**8,300 students**

Grosse Pointe, MI

Judy Gafa, Board President

313-580-0503

[gafa@gpschools.com](mailto:gafa@gpschools.com)

## **Farmington Public Schools**

**Search Year: 2013-14**

**11,000 Students**

Farmington, MI

Howard Wallach, Board President

248-444-1508

[hwallach@foleymansfield.com](mailto:hwallach@foleymansfield.com)

## **Midland Public Schools**

**Search Year: 2012-13**

**8,200 students**

Midland, MI

Jerry Wasserman, Board President

989-492-6079

## **Saginaw Township Community Schools**

**Search Year 2017-2018**

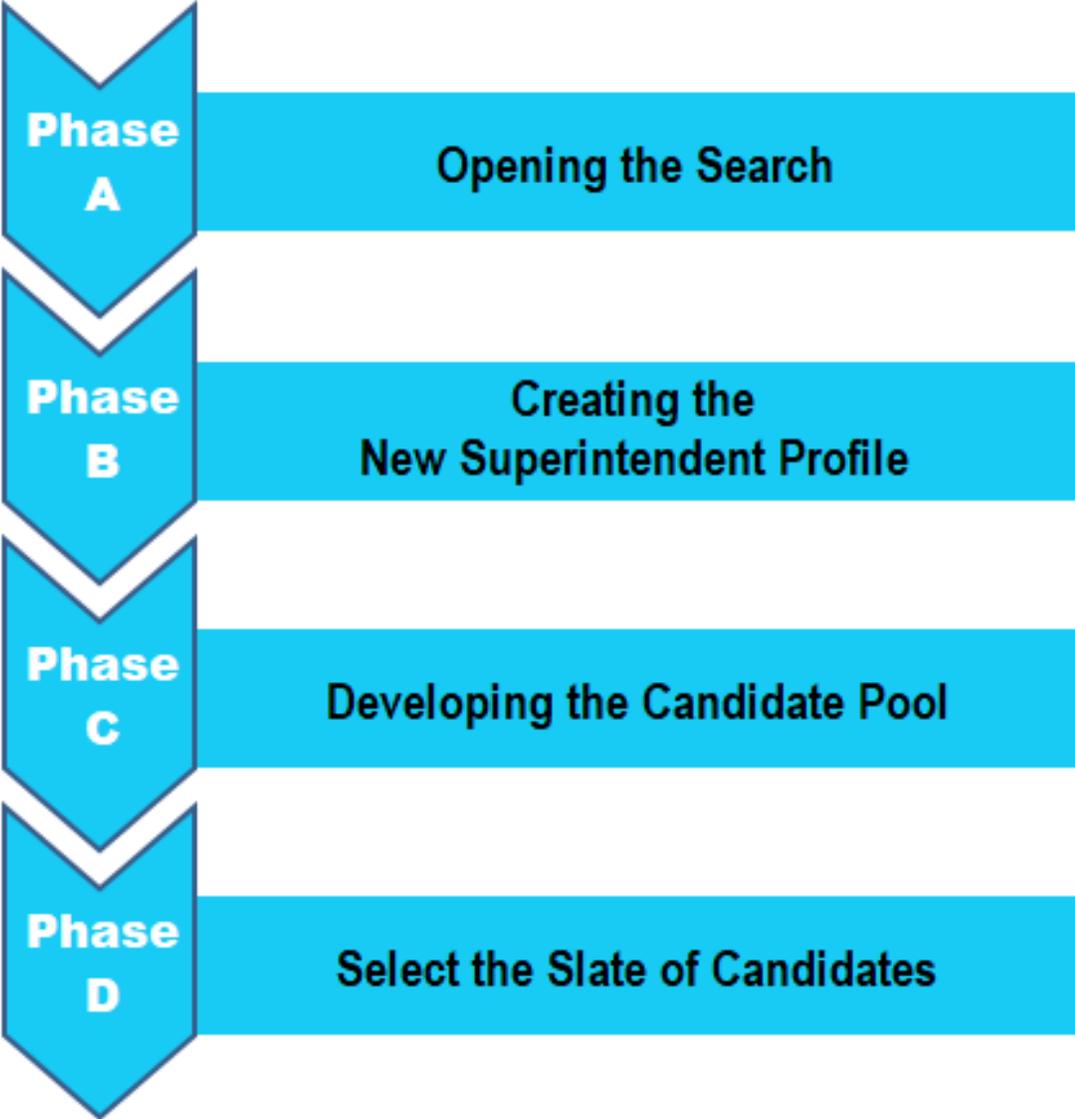
**Enrollment 4,750**

Mr. Mike Colucci, Board President

989-295-6473

[mikecolu@att.net](mailto:mikecolu@att.net)

# PROPOSED SEARCH PLAN



### **Phase A: Opening the Search (January 2021)**

- The search process begins with the signing of the Letter of Agreement.
- An initial Planning Meeting is held with the Board to establish the scope and timeline of services.

### **Phase B: Creating the New Superintendent Profile (January-February 2021)**

- Board members are interviewed to understand the qualities, skills, and experiences they seek in a new superintendent.
- Focus Groups are held with selected groups approved by the Board.
- A District-wide On-line Survey, tailored for your District, is designed to allow staff and community members to give input to the search process. This is available in multiple languages.
- A New Superintendent Profile is developed using the information gained from Board interviews, focus groups, individual interviews, and written feedback. The Board approves the New Superintendent Profile.

### **Phase C: Developing the Candidate Pool (February-March 2021)**

- The search process and calendar are posted on your District's website.
- The vacancy is advertised nationally and statewide and posted on the **SCHOOL EXEC CONNECT** website.
- The Consultants accept applications and recruit candidates who match your District's New Superintendent Profile.
- The Consultants screen and interview selected candidates face-to-face using The New Superintendent Profile.
- Internal candidates follow the same process as external candidates.
- References and Internet checks are conducted on potential candidates.
- Highly qualified candidates (typically five to seven) are presented to the Board and the Board decides whom to interview.

### **Phase D: Selecting the Candidates (March-April 2021)**

- The Consultants hold a Board Interviewing Workshop prior to the first interviews.
- The Consultants facilitate Board interviews of the slate of candidates and the Board narrows the field to three semi-finalists.
- Interview Committee(s) comprised of staff, parents and community members interview the semi-finalists in a structured process and each member writes individual feedback.
- The Board will have the semi-final candidates give a short Formal Presentation to observe the candidates' presentation skills.
- The Board conducts a second set of interviews using feedback from the Interview Committees in a formal and informal setting.
- The Board may choose to make reference calls or conduct a site visit to the final candidate's home district.
- The Board negotiates and takes action on the new superintendent's contract.

## Methods to communicate with the School Board

We have found the best method to communicate with a Board of Education is through a Board Liaison and District Staff Liaison. We use phone, email, scanning and texting. However, we will communicate in the way best for all Board members in your District. Our consultants are available to meet with the Board in person as often as requested. During the search, we provide updates and formal reports as needed and present the *Slate of Candidates*. We will recommend that the Search Process, Search Timeline, and original Profile Report be displayed on your District's website for all constituents, staff members, Board members and candidates to see.

## Timelines, pre-qualifications and final recommendation processes

Our suggested timeline is listed with a detailed search description. We find that bringing a slate of five (5) to seven (7) pre-qualified candidates to the Board works the best. We then provide training for the Board to interview and reduce the slate to three (3) finalists in first interviews. We also recommend interview committees to make non-ranked, individual recommendations to the Board before their final candidate interviews. The Consultants may facilitate these interviews.

## Our role in assisting the Board with candidate selection

We will provide the Board with detailed written interview guidelines, including questions for the candidates. We will also provide training for the Board in interviewing techniques. We also provide all written materials for the *Interview Committees* and may facilitate the interviews.

## Recommendations for community participation

We recommend that the Board involve both citizens and staff in the interviewing of final candidates.

## Information needed from Board and staff

In every search, there are specific duties and actions that can be performed only by District Board and staff liaisons. We recommend one designated Board member as the liaison for the overall communication purposes of the search and one staff member assigned to the search for logistical purposes.

Designated staff member(s) will be asked to do the following tasks:

- Oversee the posting of the position and related superintendent search information (developed by the Consultants) on your District's website with links
- Send the survey link to community and post on District website
- Provide logistical support for Focus Groups
- Duplicate copy ready materials for the interview committees
- Oversee arrangements for the interview places and equipment needed for them
- Assist in making dinner arrangements for the Board and the finalist candidates. (Optional)
- Duplicate the Committee feedback for each board member after the finalist interviews.
- Assist the Board liaison and Consultants as search issues arise



## Methods to identify and recruit candidates

To identify prospective candidates, we use a variety of methods. The most efficient way is through our Colleague *Network*. We have 60 consultants in **SCHOOL EXEC CONNECT** who work very closely together to identify candidates. Our national network has been effective in identifying candidates from out-of-state. We will use regional and state venues to advertise the position and will work with your Board to design your complete advertising approach for the position. Because candidates know and trust our firm, they will check our website and your District's website for information about your position.

# Superintendent Search Work/Task Plan

BOARD	JOINT	CONSULTANT
<p style="text-align: center;"><b>Planning meeting</b> Timeline, process, advertising</p>		
<p style="text-align: center;"><b>Community engagement</b></p> <ul style="list-style-type: none"> <li>- Focus groups</li> <li>- On-line survey</li> <li>- New superintendent profile</li> </ul>		
<p style="text-align: center;"><b>Board approval</b> New superintendent profile</p>		
<p style="text-align: center;"><b>Candidate search</b></p> <ul style="list-style-type: none"> <li>- Advertise</li> <li>- Network &amp; recruit prospects</li> <li>- Interview selected applicants</li> </ul>		
<p style="text-align: center;"><b>Board workshop</b> Interview Strategies</p>		
<p style="text-align: center;"><b>Board first interviews</b></p> <ul style="list-style-type: none"> <li>- Five to six candidates</li> <li>- Select three to move forward</li> </ul>		
<p style="text-align: center;"><b>Final preparations</b></p> <ul style="list-style-type: none"> <li>- Prepare committee(s) for interviews</li> <li>- Salary research</li> </ul>		
<p style="text-align: center;"><b>Board second interviews</b></p> <ul style="list-style-type: none"> <li>- Candidate presentations</li> <li>- Committee feedback</li> <li>- Board dinner/final interview</li> <li>- Final candidate selected</li> </ul>		
<p style="text-align: center;"><b>Final decision</b></p> <ul style="list-style-type: none"> <li>- Background check</li> <li>- Board reference calls</li> <li>- Contract offer</li> </ul>		
<p style="text-align: center;"><b>Name the new superintendent</b></p> <ul style="list-style-type: none"> <li>- Board action</li> <li>- News release</li> <li>- Introduction to community</li> </ul>		
<p style="text-align: center;"><b>Close search</b></p> <ul style="list-style-type: none"> <li>- Inform all candidates of Board's decision</li> <li>- Assist Board if needed</li> </ul>		
<p style="text-align: center;"><b>New Superintendent begins duties</b></p>		

# CONSULTING FEE

The consulting fee for your search will be \$23,500. It is inclusive and no hourly fees will be charged in addition. The consulting fee may be reduced and negotiated if the level of search services is reduced.

## **Expenses:**

Regular expenses will not exceed \$7,500. These include, but are not limited to copying, secretarial support, consultant travel expense, supplies, and interview costs.

## **Advertising:**

Advertising costs are determined and paid by the District. Options include:

- Print and online advertising in *Education Week*
- LinkedIn targeted posting/promotion
- Connections to the American Association of School Administrators (AASA) and MASA websites
- Posting on the **SCHOOL EXEC CONNECT** website
- E-mail blasts to selected superintendents and contacts throughout the country

## **Other Expense Information:**

- **SCHOOL EXEC CONNECT** will invoice your District twice. First, after signing the *Letter of Agreement* and, second, upon the Board's approval of your new superintendent's contract.
- After the candidate pool has been presented to the Board, the District incurs the costs of the search. This may include mileage, meals, lodging, etc.
- It is recommended that the finalist undergoes a criminal background check before a contract is signed; this option is a \$750 expense.

# OUR GUARANTEES

## **GUARANTEE #1**

In the event that the first slate of candidates does not include a superintendent the Board wishes to hire, the Consultants will continue to bring candidates forward for actual expenses only until the Board has found a superintendent to whom they wish to offer a contract. No additional consulting fees will be charged.

## **GUARANTEE #2**

If the superintendent leaves for any reason within twenty-four months of the starting date, the Consultants will conduct a new search for no additional Consulting Fee. The Board will pay only the actual expenses of the search as listed above under Expenses.

## **GUARANTEE #3**

**SCHOOL EXEC CONNECT** guarantees that our consultants will not recruit your new superintendent for the duration of his/her first two contracts.



MASB

MICHIGAN ASSOCIATION  
OF SCHOOL BOARDS

***EXECUTIVE SEARCH SERVICES***  
*presents*

**A PROPOSAL FOR SERVICES FOR:**

*Farmington*  
PUBLIC SCHOOLS

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## About MASB

The Michigan Association of School Boards has been providing quality educational leadership services to Michigan boards of education for more than 70 years. We are unique in the superintendent search arena in that we are a 501(c)(3) nonprofit service organization that specializes in custom services for boards of education. Other entities offering superintendent searches tend to be for-profit firms and franchises.

Should Farmington Public Schools retain MASB's Executive Search Services, you will, in effect, be hiring the entire Association. You will gain access to MASB's professional staff, extensive network and resources in their entirety.

## Why Choose MASB

MASB is the market leader in superintendent recruitment and selection in Michigan because we're committed to serving boards of education and, in doing so, creating positive outcomes for students.

Our approach to superintendent search is based upon four core tenets:

1. The responsibility of hiring the superintendent rests solely with the board of education.
2. Choosing the most highly qualified individual—who also represents the ideal fit in your community—is critical to the academic achievement and well-being of your students.
3. Searching for and selecting a superintendent should be an inclusive process that meaningfully engages all stakeholders.
4. Boards of education must have access to all information pertinent to making a sound, informed selection.

*MASB is beholden only to boards and has no obligation to place certain candidates.*

## Nationwide Network

As a member of the National Affiliation of Superintendent Searchers, which is part of the National School Boards Association, MASB is connected to a network of superintendent search consultants who assist with recruitment and vetting of candidates. NASS enables MASB to harness the skills and collective networks of search professionals across the country with proven track records of accomplishment, characterized by integrity, passion and focus. MASB has placed more than 15 out-of-state candidates into Michigan superintendent positions in recent years and has provided counsel on dozens of searches in other states.



## Open Meetings Act

MASB and its consultants are well versed in the intricacies of the Open Meetings Act and relevant public record laws. All MASB search consultants have ready access to our experienced team of attorneys for any necessary legal consultation. MASB Legal Counsel Brad Banasik, J.D. is recognized as one of Michigan's foremost authorities on the OMA.

## Recruitment of Candidates

MASB has a strong track record in diversity and is committed to recruiting a diverse, qualified pool of candidates for Farmington Public Schools. We will do this by working our extensive network of state and national contacts along with making available a variety of job posting options to maximize the visibility of this position.

Utilization of an equity lens as it relates to business practice and decision-making is a complex topic that warrants more than a brief mention in this proposal. A sampling of issues related to this topic that MASB consultants can provide guidance on include:

- Types of bias that impact selection and success of the candidate chosen (and how to overcome them)
- Recruitment and selection practices that hinder equity
- How the opportunity gap can cause boards to overlook talent

## Database of Candidates

Even though MASB does not maintain a "pool" of candidates, our applicant-tracking software does allow us access to a database of those applicants who have professed an interest in open superintendent positions in Michigan. As a result, a vast majority of the candidates in our searches are coming to us through our recruiting efforts, our employment postings, or through our extensive state and nationwide connections. MASB's Revelus Application system allows all of our postings to be seen in those states that are also using this system. This has significantly increased the number of out-of-state applicants applying for our searches.

## Vetting

During the application phase, applicants are entitled to strict confidentiality. Applicants are subject to a rigorous application process and extensive paper screening related to the selection criteria established by a board of education. MASB is able to make discreet inquiries during this phase and leverage the knowledge of applicants garnered in previous state and national searches.

Once a candidate has accepted an interview, relinquishing their right to confidentiality, significant personal and professional reference checks are conducted. Reference checks are sent to individuals listed by the candidates as well as those not listed but accessed by MASB via its extensive state and national networks. While optional, MASB encourages board members to consider making some reference checks themselves in order to gain a better feel for a candidate's prospective fit and leadership style.

Throughout the search, MASB vets every issue reported to its consultants, determining the validity of accusations that invariably surface once candidate names become public. Findings are reported to the board in a timely and straightforward manner.

## Background Checks and Screening of Applicants

MASB's processes for screening of applicants and background checks reflect industry best practices and are compliant with the complex web of laws that govern superintendent selection in Michigan.

Based on each district's specific needs, MASB offers a host of checks including, but not limited to, checks on identity, criminal records, civil records, employment, and verification of education, employment and professional licensing. Additional fees apply.

All checks are conducted in a manner that is consistent with state and federal laws and entities including the Fair Credit Reporting Act and the Equal Employment Opportunity Commission.

Screening assessments can provide additional insight about candidates. MASB routinely conducts DISC Behavioral and Superintendent Achiever Assessments for districts as requested. Additional fees apply.

## Search Team

Rodney P. Green, Ph.D. - Dr. Green is a former school administrator having served a combined 24 years as superintendent in three districts, Norway-Vulcan (Upper Peninsula), Grant (Newaygo County) and East China Schools (St. Clair County). Rod now works as a consultant and facilitator assisting school districts with strategic planning, bond issues, goal setting, board member development as well as bargaining contracts and superintendent search. 170 districts have benefited from his services over the past six years. Rod also teaches School Law for Oakland University and has presented at numerous workshops including school finance, bargaining, operations, and bond issue planning.

Greg Sieszputowski, M.Ed. - With a decade of experience cultivating education leaders and expertise in human resources and facilitation, Greg leads MASB's Leadership Development and Executive Search Services and serves as a key member of the Senior Management Team. Prior to joining MASB, Greg served as the director of the Center for Learning and Leadership at Mid Michigan College and the director of the Center for Teaching and Learning at Kirtland Community College. Greg holds a bachelor's degree in Education from Adrian College, a masters in Education Leadership from Saginaw Valley State University and a graduate certificate in Human Resource Administration from Central Michigan University.

Jay D. Bennett, M.Ed. - With over 25 years experience in K-12 education, Jay Bennett is an experienced educator and veteran school board member, having served on the Grand Ledge Board of Education and the Eaton RESA board. As a school board member himself, Jay has seen what skilled school district leadership and an effective governance team can accomplish for students - such experiences fuel Jay's passion for assisting Boards of Education as they navigate the superintendent search process. Jay holds both a bachelor's degree in Geography, Sociology, and Education and a masters in Special Education from Western Michigan University. As MASB's Assistant Director of Executive Search Services, Jay has conducted numerous superintendent searches across the state.

The Expanded Team - MASB has a diverse and well-qualified search team consisting of retired superintendents, board members and experienced staff.

## **MASB Staff Contacts**

### **Greg Sieszputowski, M.Ed.**

Director of Leadership Development and Executive Search Services  
gregs@masb.org | 517.327.9224

### **Jay D. Bennett, M.Ed.**

Assistant Director of Executive Search Services  
jbennett@masb.org | 517.327.5928

## **Search References**

Bay City Public Schools, 2017 Search  
Mark Zanotti, Board President  
989.525.6209

Center Line Public School, 2020 Search  
Gary Gasowski, Board President  
586.214.7678

Clarkston Community Schools, 2018 Search  
Elizabeth Egan, Board President  
248.933.4621

East Grand Rapids Public Schools, 2018 Search  
Natalie Bernecker, Board President  
616.949.2258

Ferndale Public Schools, 2017 Search  
Jennifer LaTosch, Board President  
248.586.8652

## Proposed Search Plan

MASB's Executive Search Services provides comprehensive support throughout the search process with special emphasis on stakeholder engagement and recruiting high-quality candidates. MASB's Search Team will support the board and district staff through all phases of the search process.

MASB's search process is turnkey and generally spans 12-14 weeks; however, there can be some expansion or compression depending on transition circumstances, district activities and calendars of busy school board trustees. While some time efficiencies may be found, it's important to allow adequate time to maintain the integrity of the search. We will work directly with the Farmington Board of Education to identify the optimal begin and end dates for the search and adjust the benchmarks accordingly.

### Planning (1 week)

MASB will work with the board of education to establish a timeline for the search, develop a plan for stakeholder engagement, identify a compensation strategy and publish a preliminary posting about the vacancy.

### Preparation (2-3 weeks)

MASB will implement the stakeholder engagement plan and work with the board of education to develop selection criteria for the vacancy. This will include conducting focused conversations with stakeholder groups, collecting perceptual data via an online survey collector and educating stakeholders about the search process as well as mechanisms for input prior to the selection of candidates.

Findings are reported to the board of education in a public meeting and ultimately serve to inform the board's development of selection criteria.

### Recruitment (6-8 weeks)

Recruitment of top talent is key to this process. MASB will work with the board of education, district staff, leadership and our unparalleled in-state and national networks to personally recruit competent, highly skilled leaders to this vacancy. The expertise of MASB's award-winning Communications, Public Relations and Marketing Team will be leveraged to ensure tremendous reach and visibility.

Advertising included in the Proposal Fee:

- MASB publications, website and social media outlets
- MIStaff, listing of education jobs available in Michigan
- NASS posting with other state organizations
- Publications of other education associations, as available

Outreach to/identification of qualified prospects will be based on:

- Alignment to the Selection Criteria
- Likely career trajectory of a prospect
- Recommendation received from board of education trustees and stakeholders
- Referrals to MASB via our extended networks of consultants and colleagues

MASB consultants will field inquiries from prospects and reach out to them to foster interest in the vacancy and an understanding of candidates' backgrounds and motivation.

### Interviews (2-3 weeks)

MASB will facilitate and manage the screening and interview process on behalf of the board of education—and do so in a manner that reinforces the board of education’s sovereign role in governance and complies with Michigan’s OMA.

MASB has found the following aspects of this phase as particularly noteworthy:

- The board of education will be provided access to the entire pool of applicants; winnowing of the pool will be done by the board in accordance with OMA and with support from MASB.
- MASB will provide the board with a list of top-tier candidates who present the strongest candidacy based on a rigorous paper screening against the selection criteria and information available during this phase of the search.
- Candidate screening and interviews (questions and format) will be designed and administered in such a way as to ensure equity and transparency while also helping the board of education discern strengths and potential challenges related to each candidate.

### Selection (1-2 weeks)

MASB advises boards of education not to make a decision until they can feel good about the decision being made. This means an MASB search doesn’t end with two cycles of interviews—an MASB search ends when the board has enough information to feel confident about the selection it is making.

Screening assessments, background checks, organized reference checks, structured interviews, writing assignments and site visits are just a few of the strategies that we leverage to help boards of education garner information about candidates.

After a selection is made, MASB will assist the board, as needed, with contract negotiations and transition planning.

### Support

MASB supports and monitors the searches we conduct well past the new superintendent’s start date and throughout the first year. Soon after the new superintendent begins, we help the governance team by facilitating a workshop to establish expectations for the first year. Additionally, our network of retired superintendents and consultants will stay in touch with your superintendent and board president to make sure the relationship gets off to a good start.

### Board/Staff Assistance

MASB will work closely with the Farmington Board of Education to design a search process tailored to the unique needs of the community and execute the search in a manner that is consistent with the district’s expectations regarding professionalism, integrity and equity.

The board of education is integral to the search process and is ultimately responsible for selection of the superintendent. MASB will facilitate the search in such a way that supports the authority of the board, honoring its practices related to governance and the district’s commitment to inclusion and equity.

MASB will work with the board of education and district staff members to ensure transparency, meaningful engagement of stakeholders and impeccable execution of search-related activities. MASB will require direct assistance from staff—largely in the areas of coordinating communications

and logistics for meetings and stakeholder input sessions. We go to great lengths to respect staff time and district resources.

## Fees

Fee-based processes will be discussed with the board's representative prior to execution. All final expenses will be billed to the district as part of the final billing process. Final billing occurs upon completion of the search process.

The fees for the search can be broken down as:

1. **Search Firm Base Fee**- \$13,000
2. **Advertising cost**- No cost for statewide posting and inclusion on National School Boards Revelus Application System. The following are options that can be used at the board's discretion:

### Supplemental Advertising Opportunities Available and Related Fees

- Local newspapers (paid advertising)
  - Ed Week, TopSchoolJobs, \$495 for a 30-day online job posting with unlimited text or html
  - The School Superintendents Association, \$559 for a 30-day online job posting
  - National Alliance of Black School Educators, \$250 for a 30-day posting
  - Association of Latino Administrators and Superintendents, \$200 for a six-week posting
3. **Travel Costs (not candidate)**- Mileage for consultant travel will be based on current IRS rates. All efforts will be taken to minimize travel costs to the district.
  4. **Other Costs**- Additional fees may be incurred for expenses such as meals, lodging, background checks, screening assessments, and supplemental local or national advertising.

Screening Assessments—Screening assessments can be coordinated by your consultant.  
 DISC Behavioral Assessment - \$90 per candidate  
 Superintendent Achiever Assessment - \$300 per candidate

Background Checks—Premium checks, including education and employer verification, start at \$79 per candidate inquiry.

## Guarantee of Service

MASB's Executive Search Services guarantees the quality of our service in the following ways:

- A 'no surprise' guarantee—Our consultants will not withhold background information on candidates and we work closely with you to ensure that stakeholders are well informed about the process.
- Satisfaction guarantee—If the candidate pool falls short of the board of education's expectations or if the superintendent placed should remain for less than one year, we will conduct the search again for no additional search fee; reimbursement of out-of-pocket expenses still applies.

## MASB Contract—Superintendent Search

### 1. Definition of Product or Service

WHEREAS, the School District has a vacancy in the office of its Superintendent of Schools and desires to search for a qualified candidate for this position; and

WHEREAS, the Michigan Association of School Boards, through its consultant, is willing to act as Consultant and Advisor to the School District and render services to assist in the employment of a new Superintendent.

NOW, THEREFORE, it is agreed by and between the parties hereto as follows:

Consultant agrees to serve as Advisor and Consultant to the School District in the selective recruitment process for a new Superintendent.

- I. The Board of Education agrees to pay MASB for professional services and to reimburse MASB for all out-of-pocket expenses of the Consultant. In the event the search is reopened or extended, the Board of Education agrees to reimburse MASB for any additional out-of-pocket expenses such as advertising, background checks and screening assessments.
- II. Consultant agrees:
  - a. To assist the Board in selection criteria development, including group interviews of board members, staff and citizens.
  - b. To advertise vacancy and solicit nominations and applications.
  - c. To organize and facilitate a screening of all applicants.
  - d. To assist the Board in preparation for the interview process.
  - e. To render such other professional services in connection therewith as may be required to enable the Board of Education to make a knowledgeable decision in the selection of a new Superintendent.
- III. Consultant will communicate with such district personnel as the Board may from time to time designate, and will update the Board of Education at regular intervals.
- IV. The Board of Education agrees to reimburse MASB for both fees and expenses for any additional consultants as agreed upon prior to services being rendered.

### 2. Independent Contractor and Liability

In the performance of the services provided under this agreement, MASB, through its Consultant, shall be an independent contractor. Under the Revised School Code, the MASB Consultant has no legal authority to enter into contracts or agreements with applicants on behalf of the Board of Education and is not an employee, agent, joint venturer or representative of the Board of Education.

The Board of Education acknowledges that only it can hire the School District's Superintendent. The Board of Education agrees, to the extent allowable by law, to defend, hold harmless and to indemnify MASB and its Consultant against all claims, losses, liability

and damages associated with the selection and hiring of the School District's Superintendent.

### 3. Effective Date

This Agreement will commence on or about 1/11/2021; however, if no date is specified, the Agreement will commence upon the Association's receipt of this executed Contract and either a purchase order or payment of fees from the District.

### 4. Term

The Contract will terminate upon completion of the terms of the Contract.

### 5. Fees

The district agrees to pay the Association the fee of \$13,000 and reimburse the Association for any out-of-pocket expenses including mileage (IRS rate), meals, lodging, background checks, screening assessments, and supplemental local or national advertising.

### 6. Guarantee of Services

MASB acknowledges the Guarantee of Services, including the "no surprise guarantee" and "satisfaction guarantee" as described in MASB's proposal.

### 7. Payment

The District agrees to pay the fee(s) under this Contract according to the following schedule:  
50% (\$6,500) due upon commencement of work  
50% (\$6,500) plus out-of-pocket expenses due upon completion

### 8. Termination

This Agreement may be terminated by the District at any time by written notice to MASB. Upon termination of this Contract, the Association shall cease its delivery of services to the District and all money owed to the Association shall become immediately due and payable. This amount will be for services rendered, including out-of-pocket expenses, to the date of termination.

### 9. Authority

The District represents that the person signing this Contract has full authority to enter into the Contract. Further, either party may rely upon a digital signature as if it were an original, and the failure of a party to have possession of a manually executed original will not affect the validity, enforceability or binding nature of this Contract.

### 10. Warranties

Except for the services and obligations imposed by the express terms of this Contract, the District and the Association agree there are no other warranties attached to this Contract.

### 11. Entire Contract

This Contract contains the complete understanding and agreement of the parties and supersedes all prior or contemporaneous agreements or understandings, oral or written, relating to the subject matter herein.

ON BEHALF OF MICHIGAN ASSOCIATION OF  
SCHOOL BOARDS

ON BEHALF OF SCHOOL DISTRICT  
FARMINGTON PUBLIC SCHOOLS



Signed:

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Don P. Wotruba  
Executive Director  
1/11/21

Printed Name:

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Title: \_\_\_\_\_

Date: \_\_\_\_\_

## Statement of Assurance

The Michigan Association of School Boards assures and certifies compliance with state<sup>1</sup> and federal laws<sup>2</sup> as they relate to conducting the process of searching for a new Superintendent. Specifically, MASB assures that:

The screening and interviewing of applicants will be performed in compliance with Michigan’s Open Meetings Act, which permits closed sessions to review applications for employment if requested by the applicant and requires all interviews to be conducted in open session.

The requirements of Michigan’s Freedom of Information Act will be followed when requests for documents relating to the search are submitted to the district.

  
 \_\_\_\_\_  
 Signature of Authorized Representative

Greg Sieszputowski, M.Ed.  
 \_\_\_\_\_  
 Printed Name

Director, Leadership Development &  
Executive Search Services/MASB  
 \_\_\_\_\_  
 Title/Organization

1/11/21  
 \_\_\_\_\_  
 Date Submitted

<sup>1</sup> These include, but are not limited to: (a) The Elliott-Larsen Civil Rights Act (Act 453 of 1976), which prohibits discrimination on the basis religion, race, color, national origin, age, sex, height, weight, familial status or marital status; (b) Persons With Disabilities Civil Rights Act (Act 220 of 1976), which prohibits discrimination on the basis of a disability; and (c) the requirements of any other state nondiscrimination statute(s) that may apply.

<sup>2</sup> These include, but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352), which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; and (e) the requirements of any other federal nondiscrimination statute(s) that may apply.

## Searches Completed by MASB

### Intermediate School Districts

Allegan AESA .....	2000, 2005, 2007
Berrien RESA .....	2010
Clare Gladwin RESD.....	1997
Clinton County RESA.....	1998, 2012, 2013
IONIA ISD .....	2000
COOR ISD.....	2018
Copper Country ISD.....	2014
Delta Schoolcraft ISD.....	2005, 2015
Eaton RESA.....	2011, 2015
Hillsdale ISD .....	2000, 2015
Huron ISD .....	2006, 2010
Ingham ISD.....	2005, 2015, 2017
Kalamazoo RESA.....	2000, 2007
Kent ISD.....	1984
Lapeer ISD .....	2005
Livingston ESA.....	2002
Manistee ISD .....	1998
Marquette Alger RESA .....	2007, 2013
Mecosta Osceola ISD.....	1998, 2017
Menominee ISD.....	2002
Midland County ESA.....	2004
Montcalm Area ISD .....	2003
Newaygo County RESA.....	1980, 2007
Oakland Schools .....	2004
Ottawa Area ISD .....	2015, 2020
Saginaw ISD .....	2007, 2014, 2020
Sanilac ISD .....	1997
Shiawassee RESD.....	2012

Washtenaw ISD .....	2008, 2011
Wayne RESA.....	2015
West Shore ESD .....	2008
Wexford Missaukee ISD.....	1997

### Local School Districts

Airport Community Schools .....	1998, 2006
Albion Public Schools.....	2007
Algonac Community Schools.....	2014
Allendale Public Schools.....	2008, 2017
Alma Public Schools.....	2011
Alpena Public Schools .....	2020
Ann Arbor Public Schools.....	1998, 2006
Arenac Eastern School.....	1998
Armada Area Schools.....	1985, 2012
Athens Area Schools .....	1986
Atherton Community Schools.....	1984, 2003, 2010
Atlanta Community Schools .....	2003, 2005, 2008, 2017
Au Gres-Sims School District .....	2020
Avondale School District.....	2006
Bad Axe Public Schools .....	2002
Baldwin Community Schools.....	2002, 2004, 2018
Baraga Area Schools.....	2005
Bark River Harris Schools.....	2003
Bath Community Schools .....	1984, 2004, 2006, 2019
Battle Creek Public Schools .....	2010
Bay City Public Schools.....	1983, 2015, 2017
Bedford Public Schools.....	2009
Beecher Community Schools .....	2007, 2017
Belding Area Schools.....	2016

Bellaire Public Schools ..... 2019

Bellevue Community Schools.....2007, 2019

Bentley Community Schools..... 2013

Benton Harbor Area Schools.....1984, 2007

Benzie County Central School ..... 1984, 2016, 2020

Big Rapids Public Schools .....2000, 2004

Birch Run Area Schools .....1986, 1998

Boyne City Public Schools..... 1999

Brandywine Community ..... 1985

Breckenridge Community Schools ..... 2015

Breitung Township Schools ..... 2006

Bridgeport Spaulding School District..... 2000, 2009, 2018

Brighton Area Schools .....1984, 2006

Bronson Community Schools ..... 2014, 2017, 2019

Buchanan Community Schools ..... 2020

Buckley Community Schools ..... 1981, 1983, 1986, 1999, 2001, 2018

Buena Vista Schools ..... 1986, 2003, 2012

Bullock Creek School District ..... 1983

Burr Oak Community Schools ..... 1984

Burt Township Schools ..... 2002

Byron Area Schools ..... 2007

Byron Center Public Schools ..... 1984

Cadillac Area Public Schools ..... 2012

Caledonia Community Schools ..... 2004

Camden Frontier Schools ..... 1998

Capac Community Schools..... 2017

Caro Community Schools ..... 2014

Carrollton Public Schools..... 2019

Carson City Crystal Area Schools ..... 2020

Carsonville-Port Sanilac School District..... 2002, 2016, 2019

Cassopolis Public Schools..... 1982, 2004, 2005

Cedar Springs Public Schools .....	1999, 2009
Center Line Public Schools.....	2003, 2009, 2020
Centreville Public Schools .....	2017
Charlevoix Public Schools.....	1998, 2012, 2015
Cheboygan Area Schools .....	1999
Chelsea School District.....	2002, 2016
Chippewa Hills School District.....	2002
Clare Public Schools .....	2005, 2011
Clarenceville School District.....	1983
Clarkston Community Schools .....	2010, 2018
Clawson Public Schools.....	2018
Clinton Community Schools .....	2013, 2016
Clio Area Schools .....	1986
Coldwater Community Schools .....	2005
Coloma Community Schools .....	1986
Columbia School District .....	2012
Comstock Park Public Schools.....	2004
Concord Community Schools .....	1998, 2010
Coopersville Public Schools.....	1981
Corunna Public Schools.....	2008, 2012
Crawford AuSable Schools .....	2005
Crestwood School District .....	1985
Croswell Lexington Schools.....	1984, 2017
Dansville Schools.....	2010
Dearborn Heights School District.....	1984
Dearborn Public Schools .....	1982
Decatur Public Schools.....	2014
Deckerville Community Schools.....	1982
DeWitt Public Schools .....	1999, 2005, 2010
Dowagiac Union Schools .....	2019
Dryden Community Schools .....	1983, 2005

Durand Area Schools .....	2007
East China School District .....	1980
East Detroit Public Schools .....	2000, 2015
East Grand Rapids Public Schools.....	2018
East Jordan Public Schools .....	1980
East Lansing Public Schools.....	1985, 2014
Eaton Rapids Public Schools.....	1986, 2000
Eau Claire Public Schools.....	2000
Edwardsburg Public Schools .....	1983
Elk Rapids Public Schools .....	2009, 2020
Elkton-Pigeon-Bay Port Laker Schools .....	2007
Escanaba Area Schools.....	2009, 2017
Ewen Trout Creek Schools.....	2015
Farmington Public Schools.....	1985, 2005, 2019
Fenton Area Public Schools.....	1985, 2000, 2016
Ferndale Public Schools .....	2000, 2017
Flat Rock Community Schools.....	2007, 2011
Flint Community Schools .....	2019
Flushing Community Schools .....	1984
Forest Area Community .....	2007
Fowler Public Schools.....	1986, 2007
Fowlerville Community Schools.....	2009
Fraser Public Schools .....	2002
Freeland Community Schools .....	1984
Fremont Public Schools.....	2002, 2010
Fruitport Community Schools.....	1981, 2009
Galien Township Schools.....	2002
Gaylord Community Schools .....	2016
Genesee School District .....	2007, 2017
Gibraltar Schools.....	2009
Gladstone Area Schools .....	2007

Gladwin Community Schools.....	1997
Gobles Public Schools .....	2005
Godfrey Lee Public Schools.....	2005, 2017
Godwin Heights Public Schools.....	2005
Goodrich Area Schools .....	2004, 2007
Grand Haven Area Schools.....	2006
Grand Ledge Public Schools .....	1984
Grand Rapids Public Schools .....	2012
Grant Public Schools.....	2000, 2006, 2019
Grass Lake Community Schools .....	2015
Greenville Public Schools .....	1982, 1997
Grosse Pointe Public Schools.....	1981, 2015
Gull Lake Community Schools .....	2008, 2019
Gwinn Area Community Schools .....	2008, 2014
Hale Area Schools .....	2002, 2011, 2019
Hamilton Community .....	1981, 1999, 2008
Hancock Public Schools .....	2017
Hanover Horton Schools.....	1999
Harbor Beach Community Schools .....	2011
Harbor Springs Public Schools.....	2018
Harper Creek Community Schools.....	1981, 1997, 2013
Harper Woods School District .....	2008, 2017
Harrison Community Schools.....	2003, 2008, 2015
Hart Public Schools.....	2005
Haslett Public Schools .....	2004, 2016
Hastings Area Schools.....	1982, 2019
Hazel Park Schools .....	2015
Highland Park Schools.....	2003, 2006
Hillman Community Schools .....	2000, 2005, 2017
Holland Public Schools .....	2004
Holly Area Schools .....	1982, 2013

Holt Public Schools .....	1986, 1997, 2015
Holton Public Schools .....	1998, 2002, 2009
Homer Community Schools .....	1982
Hopkins Public Schools .....	2003
Houghton Lake Community Schools.....	2003, 2008, 2018, 2020
Houghton-Portage Township Schools.....	2004, 2011
Howell Public Schools.....	2015
Hudsonville Public Schools .....	2009, 2018
Huron School District.....	2017
Imlay City Community Schools .....	1983
Inland Lakes Schools.....	1998
Ionia Public Schools.....	1998
Ironwood Area Schools .....	2003, 2010, 2018
Iron Mountain Schools.....	2019
Ishpeming School District.....	1982, 2014
Ithaca Public Schools.....	1999, 2016
Jackson Public Schools .....	2014
Jefferson Schools.....	2008
Jenison Public Schools .....	1985, 2003
JKL Bahweting Anishnabe PSA .....	2007
Johannesburg-Lewiston Area Schools.....	2015
Kalamazoo Public Schools .....	2007, 2020
Kalkaska Public Schools .....	1982, 2014, 2018
Kenowa Hills Public Schools .....	2007
Kent City Community Schools .....	2004, 2006
Laingsburg Community Schools.....	2009
Lake City Area Schools .....	2005, 2010
Lake Fenton Community.....	2010
Lake Shore Public Schools .....	2003
Lakeshore Public Schools .....	1984, 1985, 2003
Lakeview Public Schools .....	1983

Lakeview School District.....	2017
Lakeville School District .....	1985, 2006, 2008
Lakewood Public Schools .....	2005
L’Anse Creuse Public Schools .....	2002
Lapeer Community Schools.....	2003, 2005
Lawton Community Schools .....	2003
Leland Public Schools.....	1983
Leslie Public Schools .....	1999, 2007
Lincoln Consolidated Schools .....	1983, 2011
Linden Community Schools.....	1983
Litchfield Community Schools.....	1985, 1999
Lowell Area Schools .....	1983
Mackinaw City Public Schools.....	2004
Madison District Public Schools.....	2010
Manistee Area Public Schools.....	1997, 2004, 2010
Manistique Area Schools.....	1984, 2004, 2007, 2015, 2019
Manton Consolidated Schools .....	2002
Maple Valley Schools .....	2004, 2018
Martin Public Schools .....	1986, 2019
Marysville Public Schools .....	2005, 2010
Mason Consolidated Schools.....	2015, 2020
Mason County Central Schools .....	1986
Mason County Eastern Schools .....	2002, 2006
Mayville Community Schools.....	1985, 2000, 2014
Memphis Community Schools.....	2002
Menominee Area Public Schools .....	1981, 1999, 2008
Meridian Public Schools .....	2011
Mesick Consolidated Schools .....	1985, 2000, 2005
Michigan Center Schools.....	1984
Midland Public Schools .....	1984
Millington Community Schools.....	1998, 2003, 2011

Montague Area Public Schools .....	1983
Morenci Area Schools .....	1999
Morley Stanwood Community Schools .....	1986
Morrice Area Schools .....	1985, 2005
Mt Clemens Community Schools .....	1984, 1998
Mt Morris Consolidated Schools .....	1984, 2016
Muskegon Heights Public Schools.....	1997
Muskegon Public Schools .....	2006, 2011
Negaunee Public Schools.....	1981, 1985
New Buffalo Area Schools .....	2009, 2016
New Haven Community Schools .....	2020
New Lothrop Area Public Schools .....	2014
NICE Community School District.....	2008
North Branch Area Schools .....	2002, 2010
North Central Area Schools .....	2006, 2008, 2019
Northwest Community Schools .....	1997
Oak Park School District.....	2010
Okemos Public Schools .....	1980, 2005, 2017, 2018
Olivet Community Schools.....	1985, 2012
Onaway Area Schools .....	1999, 2002
Orchard View Schools .....	2000, 2002
Oscoda Area Schools .....	2011
Otsego Public Schools .....	1986, 2002, 2014
Owosso Public Schools .....	1983, 2009
Oxford Community Schools .....	2007
Parchment School District.....	2000, 2007, 2018
Paw Paw Public Schools .....	2016, 2019
Pennfield Schools .....	2008, 2019
Pentwater Public Schools .....	1998, 2009
Perry Public Schools .....	1980, 2008
Pewamo-Westphalia Community Schools .....	2002

Pittsford Area Schools .....	2000
Plainwell Community Schools .....	1983, 2006, 2016
Pontiac School District.....	2012
Port Huron School District.....	1981, 2014
Portland Public Schools.....	1991, 2016
Posen Consolidated Schools.....	1998
Potterville Public Schools .....	1998, 2018
Ravenna Public Schools .....	2008, 2019
Reading Community Schools .....	1986, 1998
Redford Union Schools .....	2010, 2015
Reed City Area Public Schools .....	1985, 2004, 2017
Reese Public Schools .....	1999
Reeths Puffer Public Schools .....	1986
Richmond Community Schools .....	2010
River Rouge School District.....	2005, 2008
River Valley School District.....	2000, 2005, 2011, 2020
Romeo Community Schools .....	1984, 2003
Romulus Community Schools .....	2006, 2013, 2014, 2020
Roscommon Area Public Schools .....	2006, 2011
Roseville Community Schools .....	1981
Royal Oak Public Schools .....	2005, 2011, 2017
Rudyard Area Schools.....	1983
Saginaw City School District.....	2010
Saline Area Schools .....	1984, 2008
Sandusky Community Schools.....	2000, 2007, 2017
Saugatuck Public Schools .....	2003, 2009
Sault Ste. Marie Area Schools .....	2002
Shepherd Public Schools.....	2018
Southfield Public Schools.....	2018
South Redford Schools .....	1997
Southgate Community Schools.....	1999

Sparta Area Schools .....	1999, 2006
Spring Lake Public Schools .....	2008
Springport Public Schools.....	2017
St Charles Community Schools .....	2004
St Ignace Area Schools .....	1999, 2011
St Johns Public Schools.....	1982
Standish Sterling Community Schools .....	2007
Stephenson Area Schools .....	2020
Stockbridge Community Schools .....	2012
Superior Central Schools.....	2005
Suttons Bay Public Schools.....	2007, 2014, 2020
Swartz Creek Community Schools .....	1982, 2016
Tahquamenon Area Schools .....	2005
Tawas Area Schools .....	2008
Taylor School District .....	2002, 2016
Tecumseh Public Schools .....	2013, 2019
Thornapple Kellogg Schools.....	2002, 2007
Three Rivers Community Schools .....	2018
Traverse City Area Public Schools.....	1999, 2005
Trenton Public Schools .....	2020
Troy School District .....	1986, 2014
Uby Community Schools .....	2003, 2016
Van Buren Public Schools .....	2003, 2016
Van Dyke Public Schools .....	2004
Vassar Public Schools.....	2008, 2016
Vestaburg Community Schools .....	2004
Walkerville Public Schools.....	2000, 2017
Warren Consolidated Schools .....	2008
Waterford School District .....	2002, 2015, 2019
Waverly Community Schools.....	2002, 2012
Wayland Union Schools .....	2004, 2010, 2020

Wayne-Westland Community Schools ..... 1984, 2014, 2017

West Branch Rose City Area Schools.....1983, 2000

West Iron County Schools.....2007

Western School District ..... 2009

Westwood Heights Schools ..... 2004, 2008, 2017

White Cloud Public Schools.....2000, 2004

Whitefish Township Schools..... 1998

Whiteford Agricultural Schools.....2004, 2015

Whittemore-Prescott Area Schools ..... 2014

Williamston Community Schools..... 2004

Willow Run Community Schools.....1982, 2007

Wyandotte Public Schools ..... 1986

Wyoming Public Schools.....1985, 2002

Ypsilanti Community Schools ..... 2009

January 18, 2021

Zach T. Rich, President  
Board of Education  
Farmington Public Schools  
32500 Shiawassee Rd.  
Farmington, MI 48336-2302

Dear Mr. Rich:

The Michigan Leadership Institute (MLI), one of the most experienced and successful executive search firms in Michigan, is pleased to partner with The Metropolitan Detroit Bureau of School Studies, Inc. (The Metro Bureau), an organization that has served school districts in Wayne, Oakland and Macomb Counties for over 70 years, to offer a unique and comprehensive search proposal for Farmington Public Schools.

As a member of The Metro Bureau, Farmington Public Schools can benefit from the expertise of both MLI and The Metro Bureau in your superintendent search. Our unique partnership would offer:

- A superintendent search using MLI's proven methodologies and facilitated by John Silveri, MLI's Regional President for Southeast Michigan;
- The assistance of Melissa Baker, Executive Director of the Metro Bureau and her extensive knowledge of executive leadership and the needs of Metro Bureau member districts;
- The extensive outreach, networking, and marketing of both MLI and Metro Bureau; and
- The ongoing support of both organizations for your Board of Education and Superintendent.

### Our Experience and Expertise

The Michigan Leadership Institute is proud to have a well-founded reputation as the foremost provider of high quality, research-based leadership services in Michigan. Since 1999, we have conducted over 350 successful superintendent/organizational leader searches across the state of Michigan on behalf of K-12 school districts, ISDs and ESDs, Middle Cities Association, the Michigan Department of Education, colleges and other non-profit organizations.

The Metropolitan Detroit Bureau of School Studies, Inc. (The Metro Bureau) has served school districts in Wayne, Oakland and Macomb Counties since 1947. The Metro Bureau was formed to meet the needs of school districts in your region and remains committed to understanding, advising and otherwise serving the needs of their member school districts. Because The Metro Bureau is the only entity that meets regularly with school and district leaders from all three Metropolitan Detroit counties, they are familiar with the demands placed on district leaders (including administrators and board members) who work within their environment.



(810) 591-3251



[mli@genseseisd.org](mailto:mli@genseseisd.org)



2413 West Maple Avenue, Flint, MI 48507

[www.mileader.com](http://www.mileader.com)

Each executive search facilitated by MLI and The Metro Bureau has yielded a robust pool of qualified applicants and resulted in successful placement of qualified candidates whose knowledge, experience and skill sets were aligned with the criteria developed by each district's Board of Education. The Metro Bureau staff has supported recent superintendent searches for Romeo, South Lake, Wyandotte and Garden City School Districts.

In addition, MLI conducts ongoing research on the art and science of public leadership and delivers leadership and governance academies. This expertise will help ensure that your next leader embodies the leadership qualities and characteristics important to your district. By virtue of the many searches we have conducted and a concerted effort to understand and implement searches in compliance with applicable regulations, MLI knows the requirements of FOIA and the Michigan Open Meetings Act and can help your district avoid pitfalls with respect to these requirements.

### Our Network

MLI and The Metro Bureau each have an extensive network of contacts for recruiting top quality candidates for its searches. Superintendents who have been appointed through our search process have demonstrated outstanding leadership and longevity. We attribute this success to our intentional efforts to present candidates that best match the goals, vision, and values of the school districts/organizations.

By virtue of the many searches conducted and a concerted effort to understand and implement searches in compliance with all applicable laws and regulations, MLI can help avoid pitfalls and/or errors with respect to these requirements.

### Our Guarantee and Continued Support

We will guarantee a successful search with our search process. This means, first, that the search will continue until you have an acceptable candidate. It also means that if the selected candidate chooses to leave the district within one year of appointment, for reasons other than personal health or that of an immediate family member, we will conduct another search on an expense only basis. Our commitment is to provide your district with an outstanding new leader and a flawless search process. MLI will conduct an orientation workshop with your board and new superintendent to help establish shared expectations and understandings. We find that this early step can contribute greatly to an effective and long-lasting working relationship. In addition, MLI will be a mentor resource for your new superintendent for his/her first year in the superintendent position in your district.

This packet includes the following information relating to this proposed search and our organization:

- Process and timeline
- Professional fee
- Biographical summaries of MLI and The Metro Bureau search professionals
- References

As a matter of standard business practice, our proposal is offered with the expectation that it will be held in confidence until all proposals are presented publicly.

Please note that this process can be customized to meet your district's needs. For additional information about the search process, please contact Michigan Leadership Institute Regional President John Silveri at 248-420-9354, or email [jsilverimli@gmail.com](mailto:jsilverimli@gmail.com). You may also contact me directly at 810-591-3251 or [mli@geneseeisd.org](mailto:mli@geneseeisd.org).

Sincerely,

A handwritten signature in black ink, appearing to read "Steve Tunncliff". The signature is fluid and cursive, with a large initial "S" and "T".

Steven W. Tunncliff, Ph.D.  
Executive Director, Michigan Leadership Institute  
Associate Superintendent, Genesee Intermediate School District

A handwritten signature in black ink, appearing to read "Melissa Baker". The signature is cursive and elegant, with a large initial "M" and "B".

Melissa Baker, Ed.S.  
Executive Director, The Metropolitan Detroit Bureau of School Studies, Inc.



A service of the Genesee Intermediate School District

*In partnership with*



# Superintendent Search Proposal

FARMINGTON PUBLIC SCHOOLS

JOHN SILVERI, MLI REGIONAL PRESIDENT

MELISSA BAKER, METRO BUREAU EXECUTIVE DIRECTOR



## Michigan Leadership Institute in Partnership with Metro Bureau

The Michigan Leadership Institute, one of the most experienced and successful executive search firms in Michigan, is pleased to partner with The Metropolitan Detroit Bureau of School Studies, Inc. (The Metro Bureau), an organization that has served school districts in Wayne, Oakland and Macomb Counties for over 70 years, to offer a unique and comprehensive search proposal for Farmington Public Schools. As a member of The Metro Bureau, Farmington Public Schools can benefit from the expertise of both MLI and Metro Bureau in your superintendent search. Our unique partnership would offer:

- A superintendent search using MLI's proven methodologies and facilitated by John Silveri, MLI's Regional President for Southeast Michigan;
- The assistance of Melissa Baker, Executive Director of the Metro Bureau and her extensive knowledge of executive leadership and the needs of Metro Bureau member districts;
- The extensive outreach, networking, and marketing of both MLI and Metro Bureau; and
- The ongoing support of both organizations for your Board of Education and Superintendent.



## Michigan Leadership Institute Profile

Michigan Leadership Institute is a Michigan-based business, which focuses on meeting the needs of Michigan school districts. Our mission is to make Michigan’s communities better places to learn and live by developing, deploying and supporting outstanding and inspirational local public leadership.

MLI was founded in 1998 by Dr. Timothy Quinn who served as President of the organization until 2008 when Dr. Michael Wilmot became President/CEO. In 2018, Genesee Intermediate School District assumed ownership and operations of Michigan Leadership Institute, under the direction of Dr. Steven Tunncliff, Executive Director.

We believe that the children and communities of Michigan are best served by ethical, competent and sustained leadership in our public schools. Consistent with our mission, we acknowledge that strong leadership for any school system is dependent upon the effective and ongoing development of educational leaders—thus we are in our 20<sup>th</sup> year of providing leadership to aspiring superintendents through our MLI SUPES Academy. In addition, we recognize that each school district is unique and that matching the needs of the district with the skills and attributes of their next superintendent requires an understanding of the district and community—thus we employ Regional Presidents that are keenly aware of their respective regions and dedicate the time necessary to listen and identify the unique needs of their districts in order to find the best “fit” for their next superintendent. Lastly, as former superintendents, our entire MLI Team understands the challenges of the superintendency and the need for ongoing collegiality and support—thus we commit to supporting your newly hired superintendent over the course of their first year, beginning with a governance workshop with the Board of Education and its new leader.

Our philosophy as an organization is one of service to children and communities by providing comprehensive and ongoing services to schools across Michigan—to develop, deploy and support outstanding leaders.

We are guided by the following principles:

- **The Calling** - The calling to leadership is an internal calling and a prerequisite for outstanding leadership.
- **Mastery** - Continuous pursuit of mastery in physical, social/emotional, and intellectual self, expands a leaders' strength and effectiveness.
- **Service** - Outstanding leaders define themselves and grow by viewing leadership as service to others.
- **Trust/Integrity** – Honest and open communication is integral to building and maintaining a trusting relationship.
- **Competence** – High quality performance and competence depend on clear articulation of desired outcomes and processes for continuous improvement.

The Michigan Leadership Institute is proud to have a well-founded reputation as the foremost provider of high quality, research-based leadership services in Michigan. Since 1999, we have conducted over 350 successful superintendent/organizational leader searches across the state of Michigan on behalf of K-12 school districts, ISDs and ESDs, Middle Cities Association, the Michigan Department of Education, colleges and other non-profit organizations.

MLI has an extensive network of contacts for recruiting top quality candidates for its searches. Superintendents who have been appointed through the MLI search process have demonstrated outstanding leadership and longevity. We attribute this success to our intentional efforts to present candidates that best match the goals, vision, and values of the school districts/organizations.

By virtue of the many searches conducted and a concerted effort to understand and implement searches in compliance with all applicable laws and regulations, Michigan Leadership Institute can help avoid pitfalls and/or errors with respect to these requirements.

Michigan Leadership Institute offers a wide range of professional services that support school district leadership teams including: Executive Searches, Board Governance, Strategic Planning, Facilitated Evaluations, Negotiations Support, Facilities Utilization Projects, Superintendent Mentoring, Aspiring Superintendent Preparation (MLI SUPES Academy), and specific Program Reviews. Approximately 1/4 of the current Superintendents in Michigan are graduates of the MLI SUPES Academy.



## Metro Bureau Profile

The Metropolitan Detroit Bureau of School Studies, Inc. (The Metro Bureau) has served school districts in Wayne, Oakland and Macomb Counties since 1947. We are a nonprofit organization located in the College of Education at Wayne State University. Our mission is to support school districts through effective management of human and physical resources. Because we must model cost conscious leadership, all of our services are provided to our member school districts at very low cost.

The Metro Bureau was formed to meet the needs of school districts in our region and remains committed to understanding, advising and otherwise serving the needs of our member school districts. Our work is informed through regular contact with school and district leaders.

Because our organization is the only entity that meets regularly with school and district leaders from all three Metropolitan Detroit counties we are familiar with the demands placed on district leaders (including administrators and board members) who work within our environment.

Each Metro Bureau search has yielded a robust pool of qualified applicants and resulted in successful placement of qualified candidates whose knowledge, experience and skill sets were aligned with the criteria developed by each district's Board of Education. In every case, our priority has been customer satisfaction. As you know, the selection of a superintendent is one of the most important duties of a Board of Education. As Board members, you want to be certain the person you select will be successful. The Metro Bureau staff has supported recent superintendent searches for Romeo, South Lake, Wyandotte and Garden City School Districts.



## Why Select Michigan Leadership Institute in Partnership with the Metro Bureau as your Professional Search Partner

- We have a proven record of accomplishment for successful search process management and placements who are successful in their new positions.
- We thoroughly check applicants' backgrounds prior to presenting to you, so you will have no "surprises" during the final stages of your search process.
- We provide a board/superintendent orientation workshop after the new leader is on the job to help get the relationship off to the right start.
- We provide on-going support to your new leader during their first year on the job.
- We are highly sensitive to confidentiality issues and very experienced with meeting the requirements of the Michigan Open Meetings Act and FOIA.
- We have the extensive leadership networks to ensure a strong candidate pool.
- We provide the highest quality, professional services at a good value.
- The cost of an unsuccessful or ineffective search will far exceed the price of a Michigan Leadership Institute search both in dollars and in impact on students and community.

## Search Process

Michigan Leadership Institute and The Metro Bureau shall fulfill the Scope of Services as required by the Board of Education as indicated by our Search Process:

### The Planning and Preparation Stage

- Discuss and agree upon search activities, budget and services to be performed.
- Establish search calendar customized to your district's needs.
- Consult with the Board regarding compensation, benefits and other contractual provisions for the position.
- Consult with the Board, and with others as determined by the Board, to gather input regarding the organization's leadership needs. This step may include forums with staff and community members.
- Develop an organizational and community profile to identify the unique attributes of the community and the district.
- Prepare and agree upon the position profile and specifications.

### The Implementation Stage

- Place advertisements in state (as part of proposed fee) and national professional publications (for an agreed upon additional fee) and online educational job posting sites, as approved.
- Develop an online search brochure; announce position to educational professionals and recruiting contacts.
- Make personal contacts and calls to recruit top-quality candidates.
- Communicate with potential candidates.
- Screen applicants and help to identify potential candidates that best meet the profile created by the Board of Education.
- Conduct reference checks.
- Contact candidates prior to presentation to the Board.
- Present all applicants to Board for consideration; Board will discuss and determine the candidates to be interviewed in open session.
- Conduct orientation workshop on appropriate and successful interviewing techniques and preparation for district visitation(s) if desired.
- Attend candidate interviews and facilitate board discussion, if desired.

### The Final Stage

- Communicate with unsuccessful candidates.
- Mediate employment agreement; provide contract/salary information to district.
- Facilitate orientation workshop with the new leader and the Board.
- Be on call to provide professional support and mentoring to the new leader as requested during his or her first year on the job.

As part of the Search Process, MLI and The Metro Bureau can help with the development of an online search brochure and posting of the search brochure on the MASA, Frontline (formerly Applitrack), Metro Bureau and MLI websites.

The Michigan Leadership Institute is known throughout Michigan for its superintendent preparation program: MLI SUPES Academy. Currently in its 20<sup>th</sup> year, the SUPES Academy puts MLI in the unique position of developing and supporting aspiring superintendents. Over 725 aspiring leaders have completed this preparation program including 25% of the current superintendents in Michigan. Although intended as a program to develop the skills and attributes necessary for success in the role of superintendent, the SUPES Academy also serves as an opportunity for MLI to identify high-quality superintendent candidates. As such, the SUPES Academy is a “pool” of candidates that MLI accesses when reaching out to prospective applicants. However, the fact that we have conducted over 350 searches in Michigan also serves MLI well in identifying top candidates. Lastly, with Regional Presidents across Michigan, who maintain close ties to superintendents and other high-level leaders through our various services (strategic planning, leadership coaching, governance—to name a few), and our participation in MASA, Metro Bureau and other leadership organizations, we are able to develop and sustain a large network of current and aspiring leaders from which to draw upon when recruiting top candidates to a vacancy.

Our process for screening applicants includes a thorough review of all application materials, Google searches, networking and conversations with viable candidates prior to the Board selecting those it wishes to interview. Once the interview field is discussed and established in open session, and the confidentiality of applicants is no longer an issue, we contact the references provided by the interviewees in addition to colleagues the interviewees have worked with and for. We often have the inherent benefit of having screened applicants previously during other searches. In all searches, MLI Regional Presidents consult with one another and share knowledge and information on all applicants throughout the process.

***Note: State-mandated background checks (fingerprinting), and requirements under PA 189 are the responsibilities of the employer and thus must be conducted by the district once a final candidate is selected.***

## Proposed Search Timeline

- Week 1: Meet with Board of Education to gather background, establish parameters of search, agree upon timeline and compensation parameters
- Week 2: Meet with Board and designated staff and community groups to develop organization/community profile and candidate profile; develop and approve position announcement and search brochure
- Weeks 3-8: Post position, place ads, printing and distribution, accept applications until 4:00 p.m. on agreed upon date
- Week 9: Applicant screening and reference checks
- Week 10: Presentation of applicants and determination by Board of candidates to interview
- Week 10-11: Initial interviews conducted
- Week 11: Board visitation to finalist work site or hosting of finalists to Farmington Public Schools for a district tour/community meet and greet, as determined by the Board
- Week 12: Selection of finalist, negotiation of agreement, appointment of new leader

***Note: This timeline can be customized to meet your district's needs.***



## MLI Search Facilitation

MLI searches are led by a regional president who facilitates the search and acts as the direct contact with the board, community, and candidates. All MLI searches are supported by the full team of MLI regional presidents who collaborate on the search effort to ensure that the best-qualified candidates are brought forward for consideration. MLI Regional Presidents are well equipped to both lead and support searches. MLI Regional Presidents have extensive experience in the Superintendent Search Process, enhanced by their own personal longevity and success in the role of Superintendent—a recognized strength of the Michigan Leadership Institute Team. Superintendent candidates often appreciate working with individuals who have served as a superintendent themselves and understand the challenges of the search process, the role of superintendent and the attributes of a high-functioning governance team.

**John Silveri, MLI Regional President for Southeast Michigan** will be leading this search. Mr. Silveri's career in public education included service to five Metropolitan Detroit area school districts as a teacher, counselor, principal, human resources director, assistant superintendent and superintendent. His 24 years as an administrator in Wayne, Oakland and St. Clair counties included almost 14 years in Allen Park Public Schools, five and a half years as Superintendent of Marysville Public Schools, and nearly five years as Superintendent of Waterford School District. Since his retirement, Mr. Silveri has assisted Birmingham Public Schools as its Interim Assistant Superintendent for Human Resources, Interim Deputy Superintendent and Interim Superintendent and Ferndale Public Schools as its Interim Deputy Superintendent for Human Resources.

John has served as Chairman of a North Central Association visiting accreditation team and as a member of the Board of Directors of the Marysville Chamber of Commerce, the Waterford Coalition for Youth, the Detroit Metropolitan Bureau of School Studies and the Board of Education of the St. Clair County Intervention Academy. He has also served as President of the Wayne County Negotiators and Personnel Administrators Association and as President of the Rotary Club of Marysville. He was most recently a member of the Board of Directors of the Interfaith Leadership Council of Metropolitan Detroit.

John holds a Bachelor of Science in Education degree from Central Michigan University, a Master of Arts degree in Guidance and Counseling from Eastern Michigan University, and an Education Specialist degree in Administration from Wayne State University. He is a graduate of the MASA Courageous Journey Program and the Michigan Leadership Institute Superintendent Preparation Series Academy.

John has been the Michigan Leadership Institute's Regional President for Southeast Michigan since 2015. During this time he has supported various school districts with superintendent searches, strategic planning, grade level reconfiguration, board governance and leadership coaching. He is a lifelong learner who stays abreast of current developments and trends in public education and continues to grow through his ongoing experiences with school districts and educators throughout Southeast Michigan and beyond.



**Melissa Baker, Executive Director of the Metro Bureau** has, prior to her arrival to the Metro Bureau, spent her professional career as a public school educator in Michigan. Her 27 years in education include teaching elementary school, as an elementary principal in two tri-county districts, as well as fifteen years as a central office administrator. Melissa most recently served as the Assistant Superintendent for Administrative Services, Deputy Superintendent, and then Superintendent for South Lyon Community Schools. Through these experiences Melissa was immersed in the work of human resources; contract negotiations; public relations; curriculum and instructional best practices; strategic planning; and student and district data analysis for school improvement.

Melissa is well-networked with school administrators both within the southeastern Michigan Region and across the state. While at South Lyon Melissa served as an executive board member and secretary for the Michigan Negotiators Association, president and vice-president of the Oakland Association of School Personnel Administrators, and member of the Oakland County Superintendent Association serving on the Legislative Committee and Special Education Committee. Melissa also served on the Tri-County Board and is a member of the Michigan Association of School Administrators.

Melissa has a Bachelor of Science in Elementary Education from The Ohio State University, a Masters in Educational Leadership from Eastern Michigan University, and Educational Specialist from Oakland University. She is also a graduate from the MASA Courageous Journey Program and the Michigan Leadership Institute Superintendent Preparation Academy. Melissa currently holds a School Administrator Certification/Central Office and Specialty-District Level Supervision and Evaluation certification.



## Michigan Leadership Institute Staff

The following MLI Regional Presidents will support Mr. Silveri with your search effort:

**Regional President for Eastern Michigan-Charles Andrews.** Retired Superintendent of Marysville Public Schools for 18 years.

**Regional President for Southwest Michigan-David Killips.** Retired Superintendent of the Chelsea Public Schools for 10 years and Superintendent of Reed City Schools for 5 years.

**Executive Director, Steve Tunncliff, Ph.D.** Dr. Tunncliff served as a teacher, coach, principal, assistant superintendent, and superintendent at the local district level for 19 years. Dr. Tunncliff was selected as the MASA Region 5 Superintendent of the Year in 2015 and in 2016 became the Associate Superintendent of the Genesee Intermediate School District. As Associate Superintendent, Dr. Tunncliff oversees areas that include legislative and public relations, communications, and philanthropic activities of the countywide school district and the nonprofit Genesee County Education Foundation. He also oversees the Greater Flint Educational Consortium, a collaboration between the 21 local school districts, the four higher education institutions in Genesee County, the Community Foundation of Greater Flint, and the Flint and Genesee Chamber of Commerce.

Steve has taught leadership courses in the Educational Specialist Program at the University of Michigan-Flint since 2013, allowing him to pursue his passion for cultivating future leaders. Dr. Tunncliff currently serves as the President of MASA Region 5 and sits on numerous advisory boards throughout Genesee County and beyond.

Dr. Tunncliff earned his bachelor's degree from the University of Michigan, Ann Arbor; a master's degree in administration from Central Michigan University; and both a specialist and doctoral degree from Oakland University in Educational Leadership.



## Proposed Search Plan

The initial meeting with the Board of Education is critical to determine the preferred method of communication. Typically, the Board President is the primary point of contact, with the Administrative Assistant to the Superintendent and Board of Education assisting with logistics (i.e., meeting times and locations) and the dissemination of messages and information.

This is an integral part of every search we conduct. Our primary direction is from the Board of Education however, it is our practice to meet directly with various groups of stakeholders (staff members, high school students, parents and community members) to gather their recommendations in the process. We look to the Board of Education for guidance and input as to which specific groups of stakeholders it wishes for us to meet with directly. In order to seek input of the entire community, the Board may also choose to utilize an online survey of stakeholders, as provided by MLI, in addition to face-to-face meetings with stakeholder groups.

Although rare, our most significant challenges have arisen when Boards of Education have chosen not to honor the process we all agree to follow at the beginning of the search process. In every instance where the process was followed with fidelity, we have been successful.

The Administrative Assistant to the Superintendent and Board of Education is the key point of contact for support with scheduling meetings, disseminating information, etc.

We expect a commitment from all members of the Board of Education to be present and engaged throughout the process, and to honor the process.

## Anticipated Fee Structure

Michigan Leadership Institute and The Metro Bureau will provide basic services as outlined below in the process of conducting a search for the position of Superintendent. Specific services to be provided shall include the following:

1. Advise the board on parameters of the overall search process.
2. Establish a timeline of duties and responsibilities for the conduct of the search.
3. Facilitate meetings of the faculty, staff, stakeholders and board as required to assist in articulating the candidate profile and points of district pride for inclusion in the position announcements.
4. Develop and post a standard search flyer and announcements; recruit a qualified candidate pool.
5. Receive applications, communicate with candidates, conduct paper screen, check references, and analyze all applications relative to the profile developed by the Board of Education.
6. Conduct orientation session with the board on interview process and protocol.
7. Attend initial candidate interviews and facilitate board discussions.
8. Communicate with unsuccessful candidates.
9. Mediate employment agreement as requested by the board; provide contract/salary information to district.
10. Facilitate orientation workshop with the new leader and the board to develop mutual expectations and understandings.
11. Be on call to provide professional support and mentoring to the new leader as requested during his or her first year on the job.

The above-noted services will be provided for **\$10,200.00** plus direct expenses not to exceed \$800.00. **However, as a member district of the Metro Bureau, and as a result of our partnership in this search proposal, the cost of this search will be reduced by 10% to \$9,180.00 plus direct expenses not to exceed \$800.00.** Please note that the professional services and the professional fees may be modified and customized to suit your district's needs.

Said fee covers all costs associated with the search including Michigan Leadership Institute and Metro Bureau staff time, development of posting brochure, online search announcement, job posting, marketing of the vacancy by both organizations, and associated office expenses. Also included is an optional online survey, produced and analyzed by MLI, and hosted on the district website. MLI staff mileage will be billed to the district on an actual cost basis (*at the current mileage rate issued by the IRS*), as well as any national advertising approved by the Board of Education. Fees will be invoiced and payable in three equal installments: upon commencement of search, upon recommendation of candidates, and upon selection and appointment of the successful candidate. Expenses will be invoiced with the third installment.

**MLI Search Guarantee:** If MLI endorses the candidacy of the selected candidate and he/she chooses to leave the district for any reason other than personal health or the health of an immediate family member during the first year of employment, Michigan Leadership Institute will conduct the search for a successor for direct expenses only. *This guarantee has been utilized only twice in the history of Michigan Leadership Institute.*



**Superintendent Search References 2017-2020  
Conducted by Michigan Leadership Institute**

**Bedford Public Schools**  
**1623 W. Sterns Road, Temperance MI 48182**  
Phone: 734-850-6000  
**Placement: Dr. Carl Shultz**

**Cedar Springs Public Schools**  
**204 E. Muskegon St., Cedar Springs MI 49319**  
Phone: 616-696-1204  
**Placement: Scott Smith**

**Bentley Community Schools**  
**1170 N. Belsay Road, Burton MI 48509**  
Phone: 810-591-9100  
**Placement: Kristy Spann**

**Charlotte Public Schools**  
**378 State St., Charlotte MI 48813**  
Phone: 517-541-5100  
**Placement: Mandy Stewart**

**Berrien RESA**  
**711 St. Joseph Ave., Berrien Springs 49103**  
Phone: 269-471-7725  
**Placement: Eric Hoppstock**

**Coloma Community Schools**  
**302 West St. Joseph Street, Coloma MI 49038**  
Phone: 269-468-2424  
**Placement: Dave Ehlers**

**Branch ISD**  
**370 Morse Street, Coldwater MI 49036**  
Phone: 517-279-5730  
**Placement: Kristine Jenkins**

**Comstock Public Schools**  
**3010 Golf Road, Kalamazoo MI 49048**  
Phone: 269-250-8900  
**Placement: Dr. Jeff Thoenes**

**Brighton Area Schools**  
**125 Church St., Brighton, MI 48116**  
Phone: 810-299-4000  
**Placement: Matt Outlaw**

**Constantine Public Schools**  
**1 Falcon Dr., Constantine, MI 49042**  
Phone: 269-435-8900  
**Placement: Jim Wisely**

**Byron Area Schools**  
**312 W. Maple Ave., Byron, MI 48418**  
Phone: 810-266-4881  
**Placement: Bob Cassidy**

**C.O.O.R. Intermediate School District**  
**11051 N. Cut Road, Roscommon MI 48653**  
Phone: 989-275-9555  
**Placement: Shawn Petri**

**Caledonia Community Schools**  
**9753 Duncan Lake Ave SE, Caledonia MI 49316**  
Phone: 616-891-8185  
**Placement: Dr. Dedrick Martin**

**Coopersville Area Public Schools**  
**198 East St., Coopersville, MI 49404**  
Phone: 616-997-3200  
**Placement: Matt Spencer**

**Camden-Frontier Schools**  
**4971 W. Montgomery, Camden, MI 49232**  
Phone: 517-368-5255  
**Placement: Kevin Kelly**

**Crestwood School District**  
**1501 N. Beech Daly Rd., Dearborn Hts. 48127**  
Phone: 313-274-6320  
**Placement: Youssef Mosallam**

**Crystal Falls-Forest Park Schools**  
**801 Forest Pkwy., Crystal Falls, MI 49920**  
Phone: 906-214-4695  
**Placement: Christy Larson**

**Edwardsburg Public Schools**  
**69410 Section Street, Edwardsburg MI 491112**  
Phone: 269-663-3055  
**Placement: Jim Knoll**

**Farwell Area Schools**  
**399 E. Michigan Street, Farwell MI 48622**  
Phone: 989-588-9917  
**Placement: Steven Scoville**

**Fraser Public Schools**  
**33466 Garfield Road, Fraser MI 48026**  
Phone: 586-439-7000  
**Placement: Carrie Wozniak**

**Glen Lake Community School**  
**3375 W Burdickville Rd., Maple City, MI 49664**  
Phone: 231-334-3061  
**Placement: Mr. Jon Hoover**

**The Greenspire School**  
**1026 Red Drive, Traverse City, MI 49684**  
Phone: 231-421-5905  
**Placement: Robert Walker**

**Hamtramck School District**  
**3201 Roosevelt, Hamtramck MI 48212**  
Phone: 313-872-9270  
**Placement: Jaleelah Ahmed**

**Hillsdale ISD**  
**310 W Bacon St., Hillsdale MI 49242**  
Phone: 517-437-0990  
**Placement Troy Reehl**

**Huron Valley Schools**  
**2390 S. Milford Road, Highland MI 48357**  
Phone: 248-684-8000  
**Placement: Dr. Paul Salah**

**Ionia County ISD**  
**2191 Harwood Road, Ionia MI 48846**  
Phone: 616-527-4900  
**Placement: Ethan Ebenstein**

**Kalkaska Public Schools**  
**315 South Coral Street, Kalkaska MI 49646**  
Phone: 231-258-9109  
**Placement: Terry Starr**

**Lake Orion Community Schools**  
**315 N. Lapeer St., Lake Orion, MI 48362**  
Phone: 248-693-5400  
**Placement: Ben Kirby**

**Lakewood Public Schools**  
**223 W. Broadway, Woodland, MI 48897**  
Phone: 616-374-8043  
**Placement: Dr. Steve Skalka**

**Leland Public Schools**  
**200 N. Grand Ave., Leland, MI 49654**  
Phone: 231-256-9857  
**Placement: Stephanie Long**

**Ludington Area School District**  
**809 E. Tinkham Ave., Ludington 49431**  
Phone: 231-845-7303  
**Placement: Jason Kennedy**

**Mar Lee School District**  
**21236 H Dr. N., Marshall, MI 49068**  
Phone: 269-781-5412  
**Placement Jennifer Goodman**

**Marquette-Alger RESA**  
**321 E. Ohio St., Marquette, MI 49855**  
Phone: 906-226-5100  
**Placement: Dr. Gregory Nyen**

**Mona Shores**  
**121 Randall Road, Muskegon MI 49441**  
Phone: 231-332-8201  
**Placement: Bill O'Brien, Jr.**

**Montcalm Area ISD**  
**621 New St., Stanton, MI 48888**  
Phone: 989-831-5261  
**Placement: Kyle Hamlin**

**Muskegon Public Schools**  
**349 W Webster Ave., Muskegon, MI 49440**  
Phone: 231-720-2000  
**Placement: Matthew Cortez**

**Oak Park Schools**  
13900 Granzon, Oak Park, MI 48237  
Phone: 248-336-7700  
Placement: Dr. Jamii Hitchcock

**Olivet Community Schools**  
255 1<sup>st</sup> St., Olivet, MI 49076  
Phone: 269-749-9129  
Placement: John Mertz

**Pellston Public Schools**  
172 Park Street, Pellston MI 49769  
Phone: 231-539-8682  
Placement: Stephen Seelye

**Public Schools of Petoskey**  
1130 Howard Street, Petoskey MI 49770  
Phone: 231-348-2100  
Placement: Chris Parker

**Quincy Community Schools**  
1 Educational Parkway, Quincy MI 49082  
Phone: 517-639-7141  
Placement: Marc Kramer

**Romeo Community Schools**  
316 North Main Street, Romeo MI 480665  
Phone: 586-752-0200  
Placement: Todd Robinson

**Shelby Public Schools**  
525 N. State Street, Shelby MI 49455  
Phone: 231-861-5211  
Placement: Timothy Reeves

**South Haven Public Schools**  
554 Green Street, South Haven MI 49090  
Phone: 269-637-0578  
Placement: Kevin Schooley

**South Lyon Community Schools**  
345 S. Warren, South Lyon, MI 48178  
Phone: 248-573-8127  
Placement: Steve Archibald

**Sparta Area Schools**  
465 Union Street, Sparta MI 49345  
Phone: 616-887-8253  
Placement: Pete Bush

**St. Johns Public Schools**  
501 W. Sickels Street, St. Johns MI 488879  
Phone: 989-227-4050  
Placement: Mark Palmer

**St. Joseph Public Schools**  
3275 Lincoln Ave., St. Joseph, MI 49085  
Phone: 269-926-3100  
Placement: Dr. Thomas Bruce

**Sturgis Public Schools**  
107 W. West Street, Sturgis MI 49091  
Phone: 269-659-1500  
Placement: Art Ebert

**Taylor School District**  
23033 Northline Rd., Taylor MI 48180  
Phone: 734-374-1200  
Placement: Griff Mills

**Thornapple-Kellogg Schools**  
10051 Green Lake Road, Middleville MI 49333  
Phone: 269-795-3313  
Placement: Rob Blitchok

**Thornapple-Kellogg Schools**  
10051 Green Lake Road, Middleville MI 49333  
Phone: 269-795-3313  
Placement: Dan Remenap

**Traverse Bay Area ISD**  
1101 Red Drive, Traverse City MI 49684  
Phone: 231-922-6200  
Placement: Nicholas Ceglarek

**Union City Community Schools**  
430 St. Joseph Street, Union City MI 49094  
Phone: 517-741-8091  
Placement: Ronna Steel

**Utica Community Schools (Asst. Supt.)**  
11303 Greendale Dr., Sterling Hts. 48312  
Phone: 586-797-1000  
Placement: William Holbrook

**Watervliet Public Schools**  
450 E. Red Arrow Hwy., Watervliet MI 49098  
Phone: 269-463-0300  
Placement: Ric Seager

**Wayne-Westland Community Schools**  
**36745 Marquette, Westland, MI 48185**  
Phone: 734-419-2000  
**Placement: John Dignan**

**West Shore ESD**  
**2130 W. US Highway 10, Ludington MI 49431**  
Phone: 231-757-3716  
**Placement: Dr. Jason Jeffrey**

**Westwood Community Schools**  
**3335 S. Beech Daly Rd., Dearborn Hts. 48125**  
Phone: 313-565-1900  
**Placement: Dr. Stiles Simmons**

**Wolverine Community Schools**  
**5993 Sholes St., Wolverine, MI 49799**  
Phone: 231-525-8201  
**Placement: Matthew Baughman**

*A Proposal Prepared for*

***Farmington  
Public Schools  
Farmington, Michigan***

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted by*

**MCPHERSON *MJ* JACOBSON, LLC**

EXECUTIVE RECRUITMENT & DEVELOPMENT



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January 19, 2021

Board of Education  
Farmington Public Schools  
32500 Shiawassee Street  
Farmington, Michigan 48336

Thank you for the opportunity to respond to your RFI. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Farmington Public Schools 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 be 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 diversity 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 in the field. 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.

With over 110 consultants across the United States, McPherson & Jacobson has been successfully conducting searches for governing boards since 1991.

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](mailto:mail@macnjake.com)

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

Sincerely,

*Thomas Jacobson*

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

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01/21

## ***Background and Experience of Firm***

### ***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.

### ***Reasons for Selecting our Firm***

- According to the National School Boards Association and the Council of Greater City Schools, the average tenure of superintendents is between 3.2 and 4.2 years. Organizations using the McPherson & Jacobson protocol have enjoyed sustainability of leadership. Over the past five years, 70% of administrators are still in the position for which they were hired. Over 50% of the administrators are still in the position for which they were hired within the past 10 years. Almost 40% of the administrators selected within the past 15 years continue in the position for which they were hired.
- McPherson & Jacobson advocates for a high level of stakeholder involvement during the hiring process while keeping the Board in complete control of the process. When stakeholders are meaningfully involved in the process, and know they have been listened to, they support the Board’s decision.
- McPherson & Jacobson has a commitment to work with the Board and the new superintendent during the first year. We work to clarify expectations for the first year and help foster clear communication between the Board and superintendent.

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

### **Leading National Search Firm**

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

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

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

### **Sustainability in Leadership**

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

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



**Professional Recognition/Awards**

<b>Date</b>	<b>Name of Award</b>	<b>Awarding Organization</b>	<b>State</b>
2000	Professional of the Year	Tri-States Human Resources Association	
1995	Boss of the Year	Dubuque Jaycees	IA
	Alumnus of Distinction	Western Dubuque High School	IA
	Athletic Hall of Fame	Western Dubuque High School	IA

**Community/Service/Fraternal Organizations**

<b>Name of Organization</b>	<b>Dates</b>	<b>Offices Held</b>
Hospice	2018 to Present	Board Member
100+ Men Who Care	2017 to Present	Board Member
St. John’s Church Parish	2012 to Present	Executive Board Member
Western Dubuque School Board	2008 to 2015	President
Northeast Iowa Community College Foundation	2008 to 2015	Board Member
United Way Executive Board	2007 to 2010	Member
Semi-Pro Baseball Coach	2005 to 2018	
Western Dubuque High School Booster Club	2004 to 2008	Board Member
Public Address Announcer for Basketball and Baseball – Western Dubuque High School	2001 to Present	
AAU Basketball Coach	2000 to 2012	
Bobcat Capital Support Foundation	1992 to 2014	President
Human Resources at NICC	1992 to 1999	Adjunct Instructor
St. John’s Church Parish Council	1991 to 1995	President
Little League Baseball Coach	1985 to 2005	

Mr. Gary McAndrew had conducted and participated in numerous Superintendent searches in Iowa, Illinois, and Wisconsin. His most recent searches include: Scales Mound Community Unit School District #211, IL; Starmont CSD/West Central CSD (shared supt), IA; School District of La Crosse, WI; Muscatine Community School District, IA; Stockton School District 206, IL; Vinton-Shellsburg Community Schools, IA; Marion Independent School District, IA; West Burlington Independent School District, IA; AGWSR Community Schools, IA; East Dubuque School District #119, IL; West Branch Community School District, IA; Center Point-Urbana Community School District, IA; Monticello Community School District, IA; Pulaski Community School District, WI; and School District of Sheboygan Falls, WI.

**Dr. Shelley Holt**  
**PO Box 1563**  
**Belleville, Michigan 48112**  
**Email: s\_holt@macnjake.com**  
**Phone: (909) 544-6482**

**Educational Background**

Ed.D.	2008	University of Southern California, Los Angeles	Urban Educational Leadership
M.A.	2005	California State University, Sacramento	Education Administration (Urban Education Cohort) & Administrative Credential
	2002	California State University, Hayward	Cal State Teach Credential Program; Multiple Subjects Teaching Credential
Business	2001	University of California, Berkeley Haas School of Business *six week intensive business program designed to give students basic course training in finance, accounting, marketing and organizational behavior equivalent to that received by business majors and satisfactory completion of minor	Business for Arts, Science, and Engineering Students (B.A.S.E.) program
B.A.	2000	California State University, Berkeley	Psychology

**Professional Experience**

<b>Dates</b>		<b>Title</b>	<b>District</b>	<b>Location</b>
2020	to Present	Consultant	McPherson & Jacobson	Omaha, NE
2004	to Present	Founder/Chief Executive Officer	Legacy Group, LLC	Belleville, MI
2017	to 2019	Superintendent	Wayne-Westland Community Schools District	Westland, MI
2015	to 2018	Adjunct Professor	California State University	San Bernardino, CA

<b>Dates</b>	<b>Title</b>	<b>District</b>	<b>Location</b>
2014 to 2017	Executive Director of Student Services Deputy Chief of Secondary Schools	Fontana Unified School District	Fontana, CA
2014 to 2017	Adjunct Professor	Grand Canyon University	Online
2012 to 2014	Instructional Director (Principal Supervisor)	Los Angeles Unified School District	Los Angeles, CA
2009 to 2011	Director, Secondary Education	Seaford School District	Seaford, DE
2006 to 2010	Director, Principal, Assistant Principal	Twin Rivers Unified School District	Sacramento, CA
2006 to 2009	Adjunct Professor	California State University	Sacramento, CA
2005 to 2006	M.S. Principal	Hayward Unified School District	Hayward, CA
2002 to 2005	Vice Principal (Elem. & Middle School) Teacher (Sixth Grade)	Sacramento City Unified School District	Sacramento, CA
2000 to 2009	Coordinator (Curriculum & Instruction) Teacher (Seventh and Eighth Grade)	American Indian Public Charter School	Oakland, CA

### **LEADERSHIP PREPARATION AND PROFESSIONAL GROWTH**

Michigan Association of School Administrators: First Year Superintendent Academy Graduate	2019
Association of California School Administrators: <i>Personnel Academy</i>	2017
International Institute for Restorative Justice: <i>Trainer of Trainers</i>	June 2017
Courses for Success: <i>Essential Human Resources 3 Course Training</i>	2016-2017
Association of California School Administrators: <i>Student Services Academy</i>	2015-2016 Cohort
California School Boards Association: Equity Committee and Masters in Governance Trainer	2015 - 2017
California Association of African American Superintendents and Administrators: <i>Aspiring Superintendent's Academy</i>	2013 – 2016
Pennsylvania Aspiring Superintendents Institute	March 2011
Learning Focused Solutions: <i>Trainer and Consultant</i>	July 2010 – June 2016
Sylvia Alvarez Data Analysis Training	November 2004

# *Scope of Work*

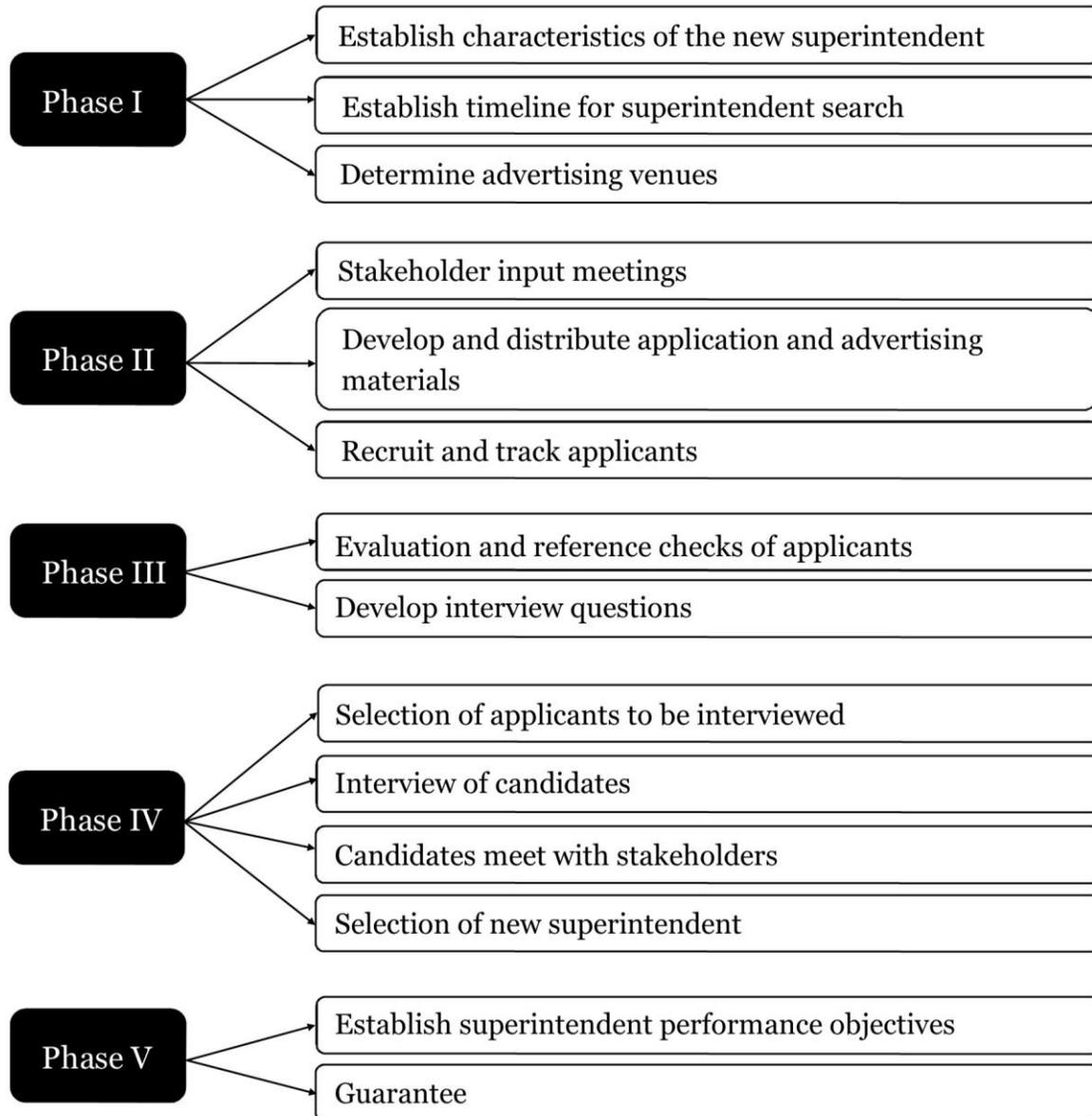
## *Executive Summary*

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

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

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

## *Five Phases of a Superintendent Search*



## **Phase I**

- ✓ **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**

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Conduct reference checks.**

We understand that applicants do not submit references who will not speak highly of them. We begin with the references given and ask them a list of questions relevant to the selection criteria. After asking those questions, we ask each reference to give us the names of other people who can speak of the applicant's qualifications. We then call those individuals and ask them the same set of questions, including asking them to give us the

names of other people who can speak of the applicant's qualification. We go a minimum of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

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

After the board selects their final candidates to interview, the names of the 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.

✓ **Conduct background checks.**

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

**Phase V**

✓ **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.

## *Responsibilities of Farmington Public Schools and McPherson & Jacobson, L.L.C.*

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

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

## Farmington Public Schools

1 <sup>st</sup> Board Meeting	<ul style="list-style-type: none"> <li><input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the Board Contact List</li> <li><input type="checkbox"/> Reviews and approves the brochure</li> </ul>
During application period	<ul style="list-style-type: none"> <li><input type="checkbox"/> Posts a link to the McPherson &amp; Jacobson website</li> <li><input type="checkbox"/> Posts the brochure (announcement of vacancy) on their website</li> <li><input type="checkbox"/> Advertises the opening on the district's social media platforms</li> </ul>
Stakeholder Group Input Meetings are scheduled	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assists in organizing stakeholder focus groups and meeting schedule</li> <li><input type="checkbox"/> Names and addresses are sent to Home Office for community meeting invitations</li> <li><input type="checkbox"/> Posts meeting dates, times, and locations as open public forum</li> <li><input type="checkbox"/> Assists in translating stakeholder input survey into the additional language(s) requested by the school district</li> </ul>
Stakeholder Group Input Meetings	<ul style="list-style-type: none"> <li><input type="checkbox"/> Link to online stakeholder input form(s) is (are) posted on the school district website</li> </ul>
Stakeholder Group Input Meetings completed	<ul style="list-style-type: none"> <li><input type="checkbox"/> "Stakeholder Input Report" is posted on the school district website</li> </ul>
3 <sup>rd</sup> board meeting	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assist with lodging arrangements and welcome gifts</li> <li><input type="checkbox"/> Arrange for spouse/significant other tour</li> </ul>
Interviews/ Finalist interviews (if board requests semi-finalist interviews)	<ul style="list-style-type: none"> <li><input type="checkbox"/> One candidate per day</li> <li><input type="checkbox"/> Board member greets each candidate upon arrival to district</li> <li><input type="checkbox"/> Informal interview-social setting</li> <li><input type="checkbox"/> Formal interview</li> <li><input type="checkbox"/> Spouse/significant other's visitation is coordinated</li> </ul>
Meeting to Select Finalist/ Finalist selected and accepted	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board meets and discusses each candidate individually</li> <li><input type="checkbox"/> Read input forms submitted by stakeholder input groups</li> <li><input type="checkbox"/> Have each board member rank order candidates</li> <li><input type="checkbox"/> Select minimum of #1 and #2 candidate</li> <li><input type="checkbox"/> Call and make offer to candidate</li> <li><input type="checkbox"/> Send interview forms and files to the Home Office</li> <li><input type="checkbox"/> Board evaluates our services</li> </ul>
Phase V	<ul style="list-style-type: none"> <li><input type="checkbox"/> Superintendent creates plan with target objectives and timelines</li> <li><input type="checkbox"/> Plan is sent to consultant to be reviewed</li> <li><input type="checkbox"/> Board adopts plan</li> </ul>

## *Stakeholder Involvement*

### **Initial stakeholder input sessions**

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

### **Meeting the candidates**

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

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

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

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

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

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

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

### **Process for Obtaining Online Stakeholder Input**

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

## *Board and District Involvement*

### **Board Involvement:**

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

### **District Assistance:**

1. Gather information for the Announcement of Vacancy brochure.
2. Provide community member names to the McPherson & Jacobson office for stakeholder input meetings invitations.
3. Assist in arranging the times and locations for the stakeholder meetings, post the meeting information.
4. Assist the consultants as they arrange the interviews.

## *Candidate Recruitment and Screening*

### *Advertising*

The consultants will discuss with the board the advertising options available and the pricing for them. The minimum advertising we recommend are the following online venues: AASA, *TopSchoolJobs.org*, ALAS (Association of Latino Administrators & Superintendents), and NABSE (National Alliance of Black School Educators). .

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

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

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

### *Identifying and Recruiting Applicants*

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

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

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

Once the board has identified its selection criteria, the consultants of McPherson & Jacobson will immediately begin to identify potential applicants both locally and nationally. McPherson & Jacobson has over 100 consultants across the United States; we will send the

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

We do not maintain a stable of candidates, but we do follow the careers of successful administrators. Individuals who are currently looking to take a new position are encouraged to register with us so they can receive notification of the vacancies we are representing. We have over 900 potential applicants currently registered with McPherson & Jacobson who will receive notification of the superintendent opening. Additionally, we will vigorously pursue current or emerging leaders through personal contact.

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

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

### *Applicant Diversity*

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

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

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

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

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

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

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

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

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

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

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

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

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

## *Post Search Services*

McPherson & Jacobson also provides a variety of workshops and seminars to assist boards and superintendents. Those workshops include:

- **Creating Board of Education Operating Principles**

*Time Required: One (1) day workshop*

*Fee: \$3,000 plus expenses*

McPherson & Jacobson consultants will assist the board in identifying operating principles that they will adhere to as they function as a board. This process clearly identifies for the board, as well as all stakeholders, how the board and administration will operate in conducting the business of providing quality education in a highly accountable environment.

- **Long- and Short-Term Goal Setting**

*Time Required: One (1) day workshop*

*Fee: \$3,000 plus expenses*

In this workshop, McPherson & Jacobson consultants will assist the Board and Leadership team in identifying goals for a three- to five-year timeframe. They will also facilitate the development of an implementation plan to achieve these goals.

- **Developing an Organizational Strategic Plan**

*Time Required: 18 to 24 months*

*Fee: \$5,000 per quarter year, plus expenses*

McPherson & Jacobson consultants will facilitate the creation of a long-range strategic plan. The process starts with the Board and Superintendent, but also involves a high degree of stakeholder input at all levels. There is a two-way communication with all stakeholders allowing for an on-going monitoring and adjustment of the plan.

## ***Timeline***

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

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

- At the beginning of the search (**February 2021**)
  - Advertising decisions are made
  - The qualities for the new superintendent are identified
  - Application information is posted
  - A formal timeline is established
  - A brochure is created to advertise the district and the vacancy
  
- At the time designated by the board (**late February-early March 2021**)
  - Stakeholder group meetings are held
  - A summary of stakeholder input is presented to the board
  
- As applications arrive in our office
  - Applications are monitored and applicants are notified of the deadlines to submit their materials
  
- After the closing date (**late March 2021**)
  - All the completed applicant files are forwarded to the consultants
  - The consultants begin the review and pre-interview process
  
- Approximately two to four weeks after the closing date (**mid-April 2021**)
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles and video interviews of qualified candidates to the board
  - The board selects the candidates it wants to interview
  - McPherson & Jacobson notifies each applicant not selected for an interview
  
- Soon after the board selects their candidates (**late April-early May 2021**)
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent
  - A criminal/financial/credential verification background check is conducted on the selected candidate
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

## *Costs*

### *Investment*

**The fee for conducting the superintendent search is \$15,900 for Phases I-V.**

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

**The total not to exceed amount including expenses is \$19,100.\* (online meetings)**

Included in the expenses is

- Thirty (30) days on AASA
- Thirty (30) days on TopSchoolJobs (Ed Week online)
- Thirty (30) days of advertising on NABSE (National Alliance of Black School Educators)
- Six (6) weeks of advertising on ALAS (Association of Latino Administrators & Superintendents)
- Two (2) days of online stakeholder meetings
- Two online stakeholder input surveys (in English and one additional language)
- Video interviews for five (5) candidates
- Criminal/financial/credential verification background check for the final candidate
- Office expenses

*\*Travel expenses for the consultants to the district are not included in this amount. If the board requests onsite meetings, McPherson & Jacobson estimates travel costs of \$900 per consultant trip to the district. (Travel costs for two (2) consultants.)*

#### **NOTE:**

- Expenses may increase if the district chooses additional media advertising.
- Fees and expenses will increase if the district requests additional stakeholder input days.
- Interview expenses for the candidates are not included in the expenses listed.
- There is an additional fee and expenses for the consultants to attend the interview sessions.

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.

## *Price Breakdown for Search Activities*

<b>Phase</b>	<b>Description of Services</b>	<b>Fee</b>	<b>Expenses</b>
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	<b>\$ 3,300</b>	<b>\$ 2,150</b>
II	Conduct stakeholder input meetings. Begin candidate recruitment.	<b>\$ 4,000</b>	<b>\$ 300</b>
III	Continue candidate recruitment. Conduct reference checks on applicants.	<b>\$ 4,000</b>	<b>\$ 300</b>
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.	<b>\$ 3,200</b>	<b>\$ 350</b>
V	Meet with the board to determine the superintendent performance objectives.	<b>\$ 1,400</b>	<b>\$ 100</b>
<b>Totals</b>		<b>\$15,900</b>	<b>\$ 3,200</b>
	<b>Total (excluding travel)*</b>	<b>\$19,100</b>	
	<b>Total (including consultant travel for four (4) trips to the district)</b>	<b>\$ 22,700</b>	

\*Fees and/or expenses will increase if

- the board chooses advertising media over \$ 2,000;
- the board requests more than two (2) days of stakeholder input sessions;
- the board requests additional languages for the online stakeholder input survey
- the board requests more than five (5) shortlist candidate videos
- the board requests consultants be present at meetings not included above, including interviews;
- actual travel costs increase due to changing prices.

### **Additional Services:**

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

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

## ***Selected References***

### **West Bend School District**

735 South Main St.  
West Bend WI 53095  
School Phone: 262-306-4800  
School District Contact: Andy Sarnow 715-416-2062  
Board Contact: Joel Ongert  
Search Year: 2019/20  
Enrollment: 6,300

### **School District of La Crosse**

807 East Avenue South  
La Crosse WI 54601  
School Phone: 608-789-7600  
School District Contact: Mark White  
Board Contact: Dr. Laurie Cooper Stoll 608-519-0982, 901-216-0402  
Search Year: 2019/20  
Enrollment: 6,500

### **Chippewa Falls Area Unified School District**

1130 Miles Street  
Chippewa Falls WI 54729-1923  
School Phone: 715-726-2417  
School District Contact: Peggy McKillip  
Board Contact: David Czec , 715-456-4097  
Search Year: 2019/20  
Enrollment: 5,100

### **Alisal Union School District**

155 Bardin Rd  
Salinas CA 93905  
School Phone: 831-753-5700  
Board Contact: Fernando Mercado 831-905-9049  
Search Year: 2019/20  
Enrollment: 9,000

### **Grand Island Public Schools**

123 Webb Rd.  
P.O. Box 4904  
Grand Island NE 68802  
School Phone: 308-385-5900  
Board Contact: Bonnie Hinkle 308-381-8205, 308-379-3577  
Search Year: 2015/16  
Enrollment: 9,607

## *Assurances*

McPherson & Jacobson has not conducted any searches in the State of Michigan. However, we are a nationwide firm that has conducted numerous nationwide searches.

All of our clients receive our highest quality service; however, the district who chooses us to be our first search in their state receives additional attention. Our business is based on our reputation and word-of-mouth advertising. It is critical that we conduct a high quality, seamless search each and every time. It is especially important that our first search in a state is stellar.

McPherson & Jacobson, L.L.C. will comply with all state and federal laws for the search. We will have a consultant who resides in the state to assist with the search.

## *Guarantee*

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.

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.

## *Contact Information*

Dr. Thomas Jacobson  
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](mailto:mail@macnjake.com)

## ***Additional Information***

### ***McPherson & Jacobson, L.L.C. Consultants***

McPherson & Jacobson, L.L.C. maintains a vast cadre of professionally trained consultants across the United States. All our consultants are actively involved in recruiting quality candidates for all searches.

All our professionally trained consultants are involved with education. Every consultant believes that every child in every district is entitled to the highest quality educational opportunities. They also believe that quality education begins with quality leadership.

Following is a list of all our consultants, listed by state:

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

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

#### **Alabama Consultants**

**Dr. Barry Carroll**, Retired Superintendent, Educational Consultant, Athens

#### **Alaska Consultants**

**Mr. Shawn Arnold**, Superintendent, Valdez

#### **Arizona Consultants**

**Dr. William Dean**, Retired Superintendent, Tucson

**Ms. Barbara Dean**, Retired from AASA, Tucson

**Dr. Mary Kamerzell**, Superintendent, Catalina Foothills School Dist., Tucson

**Dr. Les Huth**, Retired Professor, Scottsdale

**Mr. Pat Nauroth**, Retired Superintendent, Cave Creek

**Ms. Jennifer Tanner**, Board Member, El Mirage

#### **Arkansas Consultants**

**Dr. Megan Duncan**, Associate Superintendent, Fayetteville

**Mr. Wayne Gibson**, Board Member, El Dorado

**Dr. T. Kenneth James**, Education Consultant, Greers Ferry

**Mr. Bobby Lester**, Retired Superintendent, Consultant Emeritus, Jacksonville

**Dr. John H. Moore**, Retired Superintendent, Magnolia

**Dr. Tony Thurman**, Superintendent, Cabot

**Mr. Andrew Tolbert**, Retired Superintendent, Warren

**Mr. Mitch Walton**, Professor, Searcy

**Mr. Jerrod Williams**, Superintendent, Sheridan

**Dr. Kieth Williams**, Retired Superintendent, Beebe

**California Consultants**

**Dr. Derwin “Darryl” Adams**, Educational Consultant, Alta Loma  
**Mrs. Janice Adams**, Retired Superintendent, Benicia  
**Mrs. Nicole Anderson**, Educational Consultant, Vallejo  
**Mr. James Bates**, Retired Superintendent, Bakersfield  
**Ms. Aida Buelna**, Retired Superintendent, Woodland  
**Mr. Robert Ferguson**, Retired Superintendent, Napa  
**Mr. William Huyett**, Retired Superintendent, Lodi  
**Mr. Benjamin “Ben” Johnson II**, Former Board Member, Riverside  
**Dr. Barry Kayrell**, Retired Superintendent, Murrieta  
**Dr. Debra Lindo**, Retired Superintendent, Escondido  
**Dr. Steven Lowder**, Retired Superintendent, Stockton  
**Dr. Michael McCoy**, Retired Superintendent, Bakersfield  
**Mr. Jesse Modesto**, Retired Administrator, Woodland  
**Dr. Daniel Moirao**, Retired Superintendent, Danville  
**Mr. Dennis Murray**, Retired Superintendent, Murrieta  
**Dr. Marilyn Shepherd**, Retired Superintendent, Friant  
**Mr. Edward Velasquez**, Retired Superintendent, Chino  
**Ms. Teri Vigil**, Board Member, Falls River Joint Unified School Dist., McArthur  
**Mr. Daniel Zeisler**, Retired Superintendent, Grass Valley

**Colorado Consultants**

**Dr. Kenneth Haptonstall**, Colorado River BOCES Executive Director, Grand Junction  
**Mr. Paul Reich**, Former school board member, Telluride  
**Dr. Norman Ridder**, Retired Superintendent, Arvada  
**Dr. Henry Roman**, Retired Superintendent, Pueblo  
**Dr. Randall Zila**, Centennial BOCES Executive Director, Loveland

**Florida Consultants**

**Dr. Ralph Ferrie, Jr.**, Retired Superintendent, Lake Mary  
**Dr. Marjorie Alexander Wallace**, Retired IU Director, Palm Harbor

**Georgia Consultants**

**Dr. Michelle King**, Georgia Department of Education, Atlanta

**Idaho Consultants**

**Dr. Linda Clark**, Retired Educator, Boise  
**Dr. William Dean**, Retired Superintendent, Post Falls  
**Ms. Barbara Dean**, Retired from AASA, Post Falls  
**Mr. Edward Velasquez**, Retired Superintendent, Hayden

**Illinois Consultants**

**Dr. John Closen**, Adjunct Professor, Peoria  
**Dr. Lloyd Kilmer**, Retired Professor, Moline

**Iowa Consultants**

**Ms. Kimberly Antisdell**, Retired Administrator, Grimes  
**Mr. Dennis Bahr**, Retired Superintendent, Webster City  
**Mr. Michael Billings**, Retired Superintendent, Story City  
**Dr. Paul Gausman**, Superintendent, Sioux City Comm. Schools, Sioux City  
**Dr. Lloyd Kilmer**, Retired Professor, Le Claire  
**Mr. Gary McAndrew**, Former Board Member, Peosta  
**Mr. Lyle Schwartz**, Retired Superintendent, Story City  
**Dr. Richard Sundblad**, Consultant Emeritus, Urbandale  
**Dr. Steve Williams**, Consultant Emeritus, Monticello

**Kansas Consultants**

**Mr. Dennis Burke**, Retired Superintendent, Baxter Springs  
**Dr. James Christman**, Retired Professor, Pittsburg  
**Dr. Craig Elliott**, Retired Superintendent, Sedgwick  
**Dr. Justin Henry**, Superintendent, Goddard  
**Dr. James Karleskint**, Retired Superintendent, Tonganoxie  
**Mr. Von Lauer**, Retired Superintendent, Sabetha  
**Dr. Bradley Rahe**, Retired Superintendent, Holton

**Louisiana Consultants**

**Ms. Janet Dixon**, Former Board Member, Alexandria  
**Ms. Lorethie Dunn**, Former Board Member, Bastrop  
**Dr. Gerald Keller**, Past Superintendent/Board Member, Reserve  
**Mr. John Smith**, Board Member, St. Rose

**Michigan Consultants**

**Dr. Shelley Holt**, Educational Consultant

**Minnesota Consultants**

**Dr. Linda Madsen**, Retired Superintendent, Forest Lake  
**Dr. Gary Schnellert**, Retired Professor, Sartell

**Mississippi Consultants**

**Dr. Tom Clark**, Retired Superintendent, Petal  
**Dr. James Hutto**, Retired Superintendent, Petal  
**Mr. Ronald Walker**, Retired Superintendent, Hattiesburg

**Missouri Consultants**

**Dr. Randal Bagby**, Superintendent, La Monte R-IV School Dist., Gravois Mills  
**Dr. James Christman**, Retired Professor, Carl Junction  
**Dr. Dennis Cooper**, Retired Superintendent, Springfield  
**Ms. Renee Goostree**, Professor, Pittsburg State University, Joplin  
**Dr. Jeanette Tendai**, Retired Educator, St. Louis  
**Dr. Philip Schoo**, Superintendent Emeritus, Consultant Emeritus, Columbia  
**Dr. Judith Sclair-Stein**, Retired School Administrator, Chesterfield

**Montana Consultants**

**Dr. Michael McLaughlin**, Educational Consultant, Butte  
**Mrs. Sharla Anderson Johns**, Retired Administrator, Victor

**Nebraska Consultants**

**Dr. Mike Cunning**, Retired Superintendent, Hershey  
**Mr. Alan Ehlers**, Superintendent, Madison  
**Dr. Jerry Ehlers**, Consultant Emeritus, Retired Superintendent, Ainsworth  
**Dr. Randall Gilson**, Superintendent, Blair  
**Dr. Derrick Joel**, Superintendent, Raymond Central, Raymond  
**Dr. Mike Lucas**, Superintendent, Westside Comm. Schools, Omaha  
**Mrs. Jane McDaniel**, Former Board Member, Plattsmouth  
**Dr. Randy Nelson**, Consultant Emeritus, Retired Superintendent, Seward  
**Dr. James Ossian**, Professor Emeritus, Wayne State College, Wayne  
**Dr. Aaron Plas**, Superintendent, Lakeview Community Schools, Columbus  
**Mr. Darren Tobey**, Superintendent, Broken Bow  
**Dr. Rob Winter**, Retired Superintendent, Grand Island

**New Jersey Consultants**

**Dr. Ralph Ferrie, Jr.**, Retired Superintendent, Brick  
**Dr. Candis Finan**, Retired Superintendent, Summit  
**Dr. Christopher Tienken**, Professor, Educational Consultant, Spring Lake Heights

**New Mexico Consultants**

**Mr. Vernon Asbill**, Retired Superintendent, Artesian

**New York Consultants**

**Dr. William Christensen**, Superintendent, Sidney Central, Binghamton  
**Dr. John Gratto**, Professor, Plattsburgh

**North Dakota Consultants**

**Dr. Cory Steiner**, Superintendent, Northern Cass School District, Hunter

**Ohio Consultants**

**Dr. Renee Willis**, Superintendent, Richmond Heights, Willoughby Hills

**Oregon Consultants**

**Dr. Douglas Nelson**, Retired Superintendent, The Dalles

**Pennsylvania Consultants**

**Dr. Marjorie Alexander Wallace**, Retired IU Director, Waterford  
**Dr. Candis Finan**, Retired Superintendent, Matamoras  
**Dr. Jeffrey West**, IU Director, New Oxford

**South Dakota Consultants**

**Mr. Jack Broome**, Retired Superintendent, Burke  
**Dr. Henry Kusters**, Retired ASBSD Asst. Executive Director, Pierre  
**Dr. Robert Mayer**, Retired Professor, Sioux Falls

**Tennessee Consultants**

**Dr. Richard Miller**, Retired Superintendent, Thompson's Station

**Texas Consultants**

**Dr. Donald Rhodes**, Superintendent, Crowell Independent School District

**Washington Consultants**

**Dr. Robert Clark**, Interim Superintendent, Sequim

**Mr. Howard King**, Retired Superintendent, Spokane

**Dr. Steven Lowder**, Retired Superintendent, Vancouver

**Dr. Nathan McCann**, Superintendent, Ridgefield

**Mr. Richard Parker**, Former Board Member, Everett

**Mr. Richard Stewart**, Retired Superintendent, Ferndale

**Wisconsin Consultants**

**Dr. Brian Hanes**, Retired Superintendent, Oostburg

**Mr. Damian La Croix**, Superintendent, Suamico

**Wyoming Consultants**

**Mr. David Barker**, Superintendent, Platte County School Dist. #2, Guernsey

**Dr. Chuck Grove**, Retired Superintendent, Pinedale

*McPherson & Jacobson, L.L.C. References*  
*(last five years of searches)*

**Note: All searches listed are for school superintendents unless otherwise noted**

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Alaska</u>			
Valdez City Schools	Valdez	2017/18	650
<u>Arizona</u>			
Mesa Public Schools	Mesa	2019/20	64,000
Tucson Unified School District--General Counsel	Tucson	2015/16	48,000
Tucson Unified School District--Internal Auditor Position	Tucson	2016/17	48,000
Peoria Unified School District #11	Glendale	2017/18	37,000
Dysart Unified School District	Surprise	2017/18	25,000
Kyrene Elementary School District No. 28	Tempe	2015/16	18,000
Liberty Elementary School District	Buckeye	2017/18	3,500
Salt River Schools--Director of Human Resources	Scottsdale	2017/18	1,000
<u>Arkansas</u>			
Conway Public Schools	Conway	2019/20	10,117
Marion School District	Marion	2016/17	4,113
Pine Bluff School District	Pine Bluff	2015/16	4,000
Batesville School District	Batesville	2016/17	3,372
Harrison School District	Harrison	2016/17	2,800
Star City School District	Star City	2015/16	1,645
Heber Springs School District	Heber Springs	2019/20	1,600
Highland School District	Hardy	2016/17	1,571
DeWitt School District	DeWitt	2017/18	1,335
Fountain Lake School District	Hot Springs	2015/16	1,300
Riverview School District	Searcy	2019/20	1,200
McGehee Public Schools	McGehee	2016/17	1,186
Smackover-Norphlet School District	Smackover	2018/19	1,150
Mayflower School District	Mayflower	2019/20	1,100
Newport School District	Newport	2018/19	1,100
Valley Springs School District	Valley Springs	2019/20	866
Cedar Ridge School District	Newark	2019/20	705
Gurdon Public School District	Gurdon	2019/20	684

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<b><u>Arkansas (continued)</u></b>			
McCrary School District	McCrary	2018/19	665
East End School District	Bigelow	2017/18	650
Foreman School District	Foreman	2017/18	509
Concord School District	Concord	2018/19	440
<b><u>California</u></b>			
Glendale Unified School District	Glendale	2015/16	26,200
Hacienda La Puente Unified School District	City of Industry	2019/20	22,000
Hemet Unified School District	Hemet	2015/16	21,000
Ventura Unified School District	Ventura	2016/17	17,000
Oxnard Union High School District	Oxnard	2019/20	16,800
Santa Barbara Unified School District	Santa Barbara	2019/20	15,000
New Haven Unified School District	Union City	2018/19	12,000
Roseville Joint Union High School District	Roseville	2017/18	10,300
Berkeley Unified School District--Executive Director for Special Education	Berkeley	2017/18	10,000
Saugus Union School District	Santa Clarita	2017/18	10,000
Alisal Union School District	Salinas	2019/20	9,000
Calexico Unified School District	Calexico	2017/18	8,966
Newark Unified School District	Newark	2019/20	5,700
Soledad Unified School District	Soledad	2016/17	4,870
Albany Unified School District	Albany	2018/19	3,714
Richland School District	Shafter	2016/17	3,504
Parlier Unified School District	Parlier	2019/20	3,500
Nevada Joint Union High School District	Grass Valley	2017/18	2,600
Golden Valley Unified School District	Madera	2017/18	1,950
Old Adobe Union School District	Petaluma	2019/20	1,950
Alpine Union School District	Alpine	2015/16	1,700
Compass Charter Schools (formerly Academy of Arts & Sciences)--CEO Search	Thousand Oaks	2015/16	1,600
Denair Unified School District	Denair	2017/18	1,500
Grass Valley Elementary School District	Grass Valley	2019/20	1,500
Piner-Olivet Union School District	Santa Rosa	2019/20	1,300
Sonora Union High School District	Sonora	2019/20	940
Pollock Pines Elementary School District	Pollock Pines	2015/16	800
Strathmore Union Elementary School District	Strathmore	2019/20	773
Sausalito Marin City School District	Marin City	2015/16	524
Sierra-Plumas Joint Unified School District/Sierra County Office of Education	Loyalton	2018/19	425

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<b><u>California (continued)</u></b>			
Fort Sage Unified School District	Herlong	2017/18	251
Oasis Charter Public School--Executive Director	Salinas	2018/19	250
Johnstonville Elementary School District	Susanville	2016/17	212
Cold Spring School District	Santa Barbara	2016/17	175
<b><u>Colorado</u></b>			
Colorado Association of School Executives (CASE)--Executive Director	Denver	2019/20	
Thompson School District R2-J	Loveland	2017/18	16,000
Summit School District RE-1	Frisco	2019/20	3,450
Morgan County School District	Fort Morgan	2017/18	3,300
Archuleta School District 50JT	Pagosa Springs	2019/20	1,700
Clear Creek School District RE-1	Idaho Springs	2018/19	765
<b><u>Georgia</u></b>			
Fulton County Schools	Atlanta	2018/19	93,500
Troup County School System	La Grange	2018/19	12,300
<b><u>Idaho</u></b>			
Coeur d'Alene Public Schools	Coeur d'Alene	2016/17	11,000
Lake Pend Oreille School District	Ponderay	2018/19	3,500
<b><u>Illinois</u></b>			
Sigma Alpha Epsilon Fraternity--Chief Executive Officer	Evanston	2019/20	
Rock Island-Milan School District #41--Elementary School Principal	Rock Island	2018/19	6,300
East Dubuque School District #119	East Dubuque	2017/18	700
Stockton School District 206	Stockton	2019/20	660
<b><u>Iowa</u></b>			
Marshalltown Community School District	Marshalltown	2015/16	5,085
Muscatine Community School District	Muscatine	2019/20	4,820
Ottumwa Community School District	Ottumwa	2015/16	4,595
Marion Independent School District	Marion	2018/19	1,932
Webster City Community Schools	Webster City	2017/18	1,800
Vinton-Shellsburg Community Schools	Vinton	2019/20	1,675
Center Point-Urbana Community School District	Center Point	2015/16	1,543

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<b><u>Iowa (continued)</u></b>			
West Liberty Community School District	West Liberty	2016/17	1,307
Cedar Rapids Community School District-- High School Principal	Cedar Rapids	2016/17	1,300
Clear Lake Community School District	Clear Lake	2015/16	1,200
Monticello Community School District	Monticello	2015/16	1,096
Eddyville-Blakesburg-Fremont Community School District	Eddyville	2019/20	1,034
West Burlington Independent School District	West Burlington	2018/19	1,000
West Monona CSD/West Harrison CSD (shared supt)	Onawa / Mondamin	2019/20	981
Sibley-Ocheyedan Community School District	Sibley	2018/19	850
West Branch Community School District	West Branch	2017/18	844
Belmond-Klemme Community School District	Belmond	2015/16	801
MMCRU Schools (Marcus Meridian Cleghorn Remsen Union)	Marcus	2017/18	800
North Cedar Community School District	Stanwood	2015/16	800
North Kossuth CSD & North Union CSD (shared supt)	Swea City/Armstrong	2015/16	743
Ogden Community School District	Ogden	2017/18	700
Sioux Central Community School District	Sioux Rapids	2019/20	667
AGWSR Community Schools	Ackley	2017/18	624
<b><u>Kansas</u></b>			
Lansing Unified School District 469	Lansing	2015/16	2,600
Ottawa USD 290	Ottawa	2017/18	2,386
Piper USD 203	Kansas City	2019/20	2,314
Chapman USD 473	Chapman	2015/16	1,065
Burlington USD 244	Burlington	2015/16	854
Wellsville USD 289	Wellsville	2017/18	782
Lyndon USD 421	Lyndon	2016/17	400
Stafford USD 349	Stafford	2016/17	200
<b><u>Mississippi</u></b>			
Jackson Public Schools	Jackson	2017/18	27,062
Madison County School District	Ridgeland	2017/18	13,225
Gulfport School District--Principal--Middle School	Gulfport	2018/19	5,500
Starkville Oktibbeha Consolidated School District	Starkville	2016/17	5,200

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<b><u>Missouri</u></b>			
Hazelwood School District--Director of Finance	Florissant	2018/19	18,000
Lee's Summit R-7 School District	Lee's Summit	2019/20	18,000
Francis Howell School District	Saint Charles	2015/16	17,000
Webster Groves School District	Webster Groves	2015/16	4,500
Willard Public Schools	Willard	2016/17	4,500
<b><u>Montana</u></b>			
Shepherd School District #37	Shepherd	2016/17	750
<b><u>Nebraska</u></b>			
Learning Community of Douglas and Sarpy Counties--Chief Executive Officer	Omaha	2015/16	
Grand Island Public Schools	Grand Island	2015/16	9,607
Hastings Public Schools	Hastings	2018/19	3,740
Waverly School District 145	Waverly	2016/17	1,920
Crete Public Schools	Crete	2015/16	1,800
Seward Public Schools	Seward	2016/17	1,406
South Central Nebraska Unified #5	Fairfield	2017/18	681
Arlington Public Schools	Arlington	2018/19	660
Chase County Schools	Imperial	2017/18	620
Gibbon Public Schools	Gibbon	2016/17	598
Palmyra Bennet District OR-1 Schools	Palmyra	2019/20	581
Centura Public Schools	Cairo	2017/18	486
Doniphan-Trumbull Public School	Doniphan	2017/18	465
Superior Public Schools	Superior	2017/18	435
Southern Public Schools	Wymore	2016/17	395
Shelton Public Schools	Shelton	2019/20	300
Pawnee City Public Schools	Pawnee City	2015/16	297
Axtell Community School	Axtell	2016/17	264
<b><u>New Hampshire</u></b>			
Manchester School District	Manchester	2018/19	13,803
<b><u>New Mexico</u></b>			
Carlsbad Municipal Schools	Carlsbad	2016/17	6,410

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<b><u>North Carolina</u></b>			
Charlotte-Mecklenburg Schools	Charlotte	2015/16	145,363
Dare County Schools	Nags Head	2016/17	5,500
<b><u>Ohio</u></b>			
Indian Hill Exempted Village School District	Cincinnati	2018/19	2,000
<b><u>Oregon</u></b>			
Reynolds School District	Fairview	2017/18	11,200
Springfield Public Schools	Springfield	2018/19	10,700
North Wasco County School District 21	The Dalles	2019/20	3,000
North Bend School District	North Bend	2018/19	2,300
<b><u>Pennsylvania</u></b>			
North Allegheny School District	Pittsburgh	2019/20	8,500
Fox Chapel Area School District	Pittsburgh	2019/20	4,027
<b><u>South Carolina</u></b>			
Jasper County School District	Ridgeland	2015/16	3,000
<b><u>South Dakota</u></b>			
Rapid City Area School District 51-4	Rapid City	2015/16	13,320
Harrisburg School District	Harrisburg	2018/19	4,700
Sisseton School District 54-2	Sisseton	2016/17	925
<b><u>Tennessee</u></b>			
Tennessee Public Charter School Commission--Executive Director	Nashville	2019/20	
Tennessee--State Turnaround Superintendent	Nashville	2019/20	
<b><u>Utah</u></b>			
Park City School District--Chief Academic Officer	Park City	2018/19	4,700
Park City School District--Chief Operations Officer	Park City	2018/19	4,700
Park City School District--Director of Talent Management	Park City	2018/19	4,700
<b><u>Vermont</u></b>			
Burlington School District	Burlington	2019/20	4,200

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<b><u>Virginia</u></b>			
Norfolk Public Schools	Norfolk	2019/20	30,000
Roanoke City Public Schools	Roanoke	2019/20	14,000
<b><u>Washington</u></b>			
WSSDA--Executive Director	Olympia	2015/16	
Clover Park School District	Lakewood	2018/19	12,885
Othello School District No. 147	Othello	2015/16	4,000
Ellensburg School District #401	Ellensburg	2017/18	3,300
Tukwila School District	Tukwila	2018/19	2,934
Blaine School District	Blaine	2018/19	2,200
Port Townsend School District	Port Townsend	2015/16	1,214
Mabton School District	Mabton	2017/18	1,000
Coupeville School District	Coupeville	2017/18	980
Chewelah School District	Chewelah	2017/18	815
Quilcene School District	Quilcene	2017/18	650
Kittitas School District	Kittitas	2016/17	600
Ocosta School District	Westport	2016/17	600
Mossyrock School District	Mossyrock	2015/16	530
Soap Lake School District #156	Soap Lake	2017/18	490
McCleary School District	McCleary	2017/18	325
Crescent School District	Joyce	2015/16	250
Thorp School District	Thorp	2017/18	170
Quileute Tribal School	La Push	2019/20	120
North River School District	Cosmopolis	2019/20	67
Skykomish School District	Skykomish	2015/16	45
<b><u>Wisconsin</u></b>			
School District of La Crosse	La Crosse	2019/20	6,500
West Bend School District	West Bend	2019/20	6,300
Chippewa Falls Area Unified School District	Chippewa Falls	2019/20	5,100
Pulaski Community School District	Pulaski	2019/20	3,700
DeForest Area School District	DeForest	2015/16	3,625
School District of Fort Atkinson	Fort Atkinson	2016/17	2,900
School District of Sheboygan Falls	Sheboygan Falls	2019/20	1,688
Cedar Grove-Belgium School District	Cedar Grove	2019/20	1,350
Bristol School District No. 1	Bristol	2015/16	770

# What Board Members Say About McPherson & Jacobson's Search Services



North Allegheny Board of School Directors

200 Hillvue Lane  
Pittsburgh, PA 15237-5391

412-369-5437

November 30, 2020

Dr. Thomas Jacobson, Chief Executive Officer  
McPherson and Jacobson L.L.C.  
11725 Arbor Street, Suite #220  
Omaha, NE 68144

**RE: Superintendent Search for North Allegheny School District, Wexford, PA**

Dear Dr. Jacobson:

Recently, the Board of Directors unanimously voted to hire North Allegheny's new Superintendent of Schools, Dr. Melissa Friez. I wanted to share with you the Board's appreciation for the work of the McPherson & Jacobson team in this effort.

After seeking proposals from several firms, M&J was selected in early Spring 2020. Dr. Ralph Ferrie, Dr. Steven Joel, and Dr. Marjorie Wallace were identified as the key consultants for the search. Given a July deadline, advice on timing was critical including whether the plan should include hiring an interim Superintendent. The team explained the realities and timeline of completing a search, and as a result the Board was provided with direction on identifying, vetting, and selecting an appropriate interim Superintendent. This process was the first evidence of M&J's professionalism and the first success of the search. Dr. Patrick O'Toole was chosen as the interim. His value was quickly realized, and his advice helpful as the process continued toward finding the permanent Superintendent.

Conducting a completely virtual search during the COVID pandemic was challenging. However, the M&J team was knowledgeable and professional. Stakeholder information was collected virtually, a candidate profile developed, advertising venues were recommended, and ultimately the team delivered an impressive slate of potential candidates. The initial review of applicants was left entirely to M&J and the Board was very pleased with the five candidates who were brought forward for interviews.

With the interview and decision tools provided by the M&J team, the selection became clear. After the final interviews, the Board depended on the team's advice regarding contract terms and expectations. The Board was pleased to be able to vote unanimously to hire Dr. Friez to oversee the District for the coming five years.

I thank you for the professional services of your firm and particularly for the leadership of Dr. Ferrie who was always available and responsive. I encourage you to contact me if you have questions.

Sincerely,

A handwritten signature in blue ink that reads 'Richard McClure'.

Richard McClure  
2019-2020 President, North Allegheny School Board of Directors

cc: Dr. Ralph Ferrie  
Dr. Steven Joel  
Dr. Marjorie Wallace  
North Allegheny School Board of Directors

**From:** Mark White <[mwhite@lacrossesd.org](mailto:mwhite@lacrossesd.org)>  
**Sent:** Friday, May 15, 2020 9:45 AM  
**To:** Gary McAndrew <[gary@mcmsearchgroup.com](mailto:gary@mcmsearchgroup.com)>  
**Subject:** Re: Request

The School District of La Crosse engaged the services of McPherson and Jacobson to assist with the hiring of a new Superintendent of Schools in December of 2019 and completed the search in March, 2020 with the successful hiring of a new Superintendent of Schools.

As the HR Director for the School District of La Crosse I served as the district liaison for the search. I found both the company and our search coordinator to be organized, ethical, and skilled. Communications were clear and timelines followed. McPherson and Jacobson presented a preferred organization and timeline for the search and adapted their normal procedures for the specific needs of our district. Our search was highly successful and the experience with McPherson and Jacobson was a very positive one.

**Mark J. White**

Director of Human Resources  
School District of La Crosse, WI  
608-789-7650  
[NAESP President 2014-2015](#)

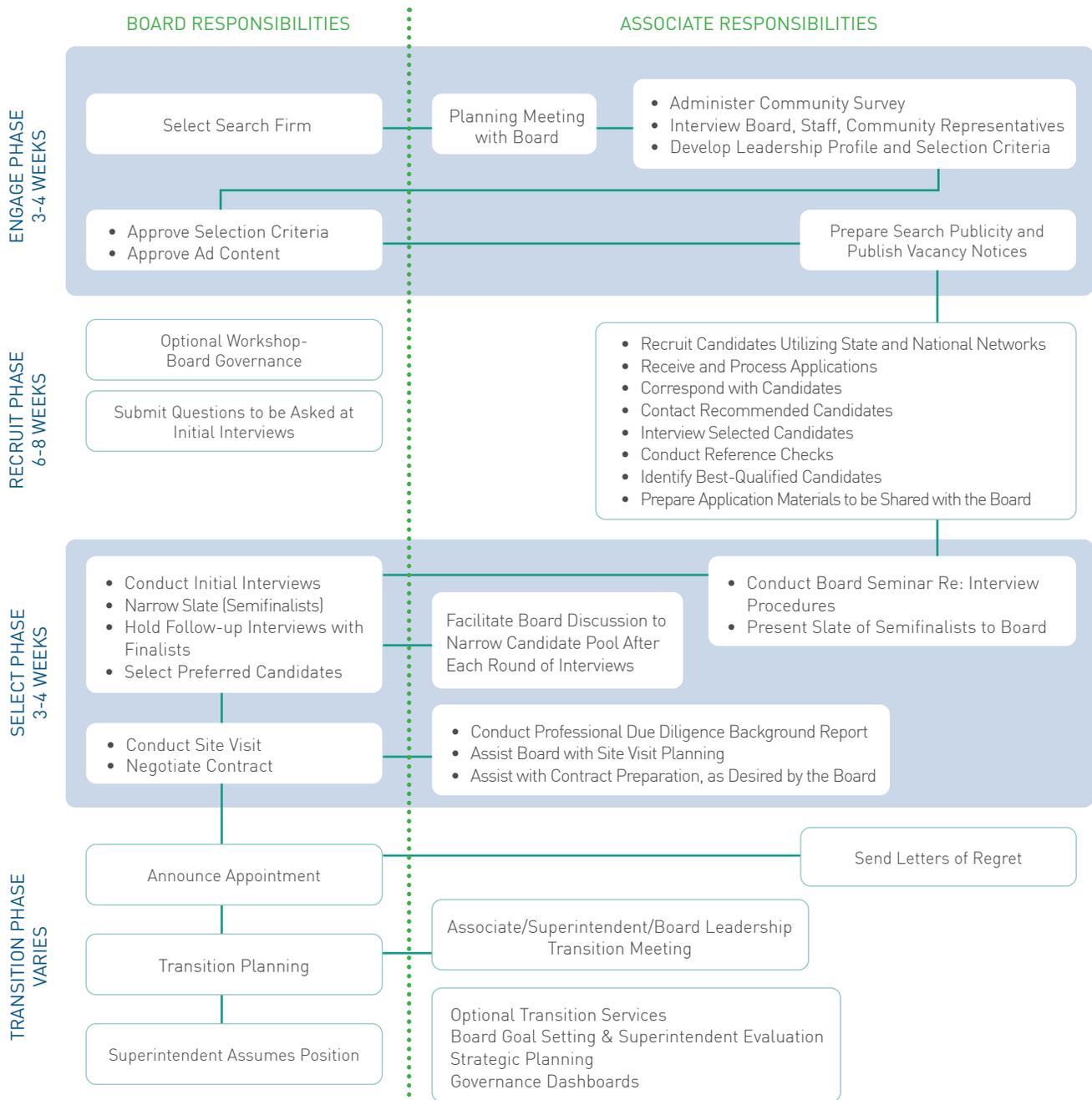


# Farmington Public Schools Superintendent Search Proposal

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**HYA** | HAZARD  
YOUNG  
ATTEA  
ASSOCIATES

# HYA Signature Search Process



January 19, 2021

Mr. Zach Rich, President  
Farmington Public Schools, Board of Education  
32500 Shiawassee Street  
Farmington, MI 49336

Dear Members of the Farmington Public Schools Board of Education:

Thank you for the opportunity to present this overview of the services that Hazard, Young, Attea & Associates, (HYA) can provide to Farmington Public Schools in your search for a new Superintendent. Why is HYA exceptional amongst educational search firms? We believe it is due to the following factors:

**NATIONAL REACH – LOCAL KNOWLEDGE:** We have conducted over 1400 searches and are represented by associates throughout Michigan and across the nation. We have also conducted searches for more than half of the member districts of the Council of Great City Schools and 47 of the 100 largest districts in the country.

**THE BOARD PORTAL:** Communication and organization are critical to successful searches. Our web-based delivery system gives the Board anytime, anywhere access to all documents regarding the search. Whether through a tablet, smart phone, laptop or desktop computer, the Board and the search Associates have confidential access to all information associated with the search in an organized, transparent, and timely manner.

**RESEARCH BASED COMMUNITY ENGAGEMENT:** HYA's community engagement process and online survey employ research-based approaches to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The survey was developed based on research on effective leadership.

**MORE THAN A BACKGROUND CHECK – EXECUTIVE DUE DILIGENCE:** HYA's comprehensive and expanded background checks are completed by independent third-party investigators and include an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read.

Our technical proposal, which follows, was written based on the requirements defined in your RFI. The proposal defines a prototypical search, but please know that HYA customizes each search to the District's and Board's specific needs and wishes.

Sincerely,



Glenn "Max" McGee, Ph.D.  
President  
Hazard, Young, Attea & Associates

## INTRODUCTION

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

## BACKGROUND AND EXPERIENCE OF FIRM

Hazard, Young, Attea & Associates (HYA) has more experience in identifying quality educational executives than any other firm in the industry. The fact that it has assisted boards with successful selections in more than 1,400 searches is no accident. Our firm began working with Boards more than thirty years ago in an effort to assist them in recruiting highly qualified candidates and finding a leader that is the right fit for the district. HYA's success is about people: our Associates, their extensive contacts and the Boards we assist. We build relationships with each new search, expanding our reach and our record of success.

We find that the large quantity of searches our firm conducts per year puts us at a competitive advantage. The search volume places our firm and its Associates in more frequent contact with potential candidates, many of whom may not be actively seeking employment but are then known to the Associates and can thus be recruited when or if an appropriate position arises. Presently, our firm is represented by 100+ Associates from throughout Michigan and the United States who assist with the firm's mission to provide aggressive, thorough and quality assistance to school boards in need of identifying and recruiting highly qualified executives for superintendencies and other administrative positions.

## THE SEARCH TEAM

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

<b>HYA Associate</b>	<b>Cell Phone</b>	<b>Email</b>
Jim Morse	616-292-1599	jamesemorse@hyasearch.com
Alena Zachery-Ross	248-252-0347	alenazacheryross@hyasearch.com

### **Jim Morse**

Dr. James Morse has over 40 years of experience as a Superintendent, Assistant Superintendent for Instruction, Principal, Associate Dean of a Graduate School, Professor of Education and Senior Associate for Hazard, Young, Attea and Associates conducting Superintendent and other senior administrative position searches since 2010 in Michigan,

Ohio, Kansas and Missouri. Dr. Morse worked for Michigan State University as a Visiting Professor for 30 years and for three years as a Consultant for 15 low performing schools in Michigan. He has presented at state conferences on Board/Superintendent Relations and was President of Suburban School Superintendents, a national association. He has a passion for finding and supporting leaders who want to improve student achievement in our nation's schools.

### **Alena Zachery-Ross**

Mrs. Alena Zachery-Ross is the currently the Superintendent for Ypsilanti Community Schools. She was formerly the Superintendent of Schools for Okemos Public Schools and the Muskegon Heights Public School Academy, the first local public charter school district in the United States, where she served in that role for the past 5 years. Mrs. Zachery-Ross previously worked in Van Dyke Public Schools in Warren, MI for nine years where she served as an Assistant Superintendent for curriculum and instruction, Elementary School Principal, Middle School Principal, School Psychologist and Teacher Consultant during her tenure there. Prior to working in the Van Dyke Public Schools district, Mrs. Ross was an Elementary School Teacher and School Psychologist for the Detroit Public Schools district. Mrs. Zachery-Ross attended Grand Valley State University where she received a Bachelor's Degree with a major in Special Education/Psychology in 1995. She earned her Masters of Arts in Education Psychology from Wayne State University in 1999 and will be receiving her doctorate in Administration Leadership in April, 2021.

Executive oversight for the search is provided by the HYA president, Dr. Max McGee. He can be reached at 224-234-6129 and [maxmcgee@hyasearch.com](mailto:maxmcgee@hyasearch.com). Therese Meyer serves as project manager and can be reached at 847-744-5640 and [theresemeyer@hyasearch.com](mailto:theresemeyer@hyasearch.com)

## **SCOPE OF SERVICES**

HYA shall provide the following services and deliverables.



### **Engage Phase**

HYA takes great pride in its commitment to community engagement and thoroughness of the processes used to gather input. We have a strong reputation for deep and meaningful engagement at stakeholder forums, community interest group meetings and individual interviews. We also use a research based survey tool that is available in multiple languages and is presented with disaggregated data by stakeholder group. Some of the most important deliverables during the engagement phase of the search include the following:

- Conduct a Planning Meeting with the Board and provide a summary of said

- meeting which will detail the timeline and steps of the search process and decisions made by the board;
- Survey community constituents electronically and provide a report of findings; The HYA Community Engagement Survey is a research based instrument that is specifically designed for the search process and has a specific analysis, scoring logic and reporting framework. If the client requests a customized survey, the team will assist the district in designing a customized survey.
  - Provide for up to four individual consultant days for interviews, focus groups, and/or town hall meetings to gather in-person input from constituent groups as decided by the board; additional days are billed at \$1000/day;
  - Present a *Leadership Profile Report* to the Board, and propose *Desired Characteristics* based on the data from the survey, interviews with district and community representatives and other material made available to the associates.

**Extensive experience and expertise conducting video interviews, focus groups, forums, meetings, and candidate presentations, meet and greets, and community Q&A sessions**

The HYA team will work with the Board to customize an approach to stakeholder engagement that takes into consideration current status of social distancing and the specific needs of the District Community. Long before Covid-19, our firm was conducting online community forums. In addition, with current travel and meeting restrictions we have recently conducted on-line focus groups with students, staff, alumni, community groups, city and county council members, etc. HYA has also reported and presented to school boards at public meetings and in closed sessions using the whole array of digital platforms: Zoom, Google Meet, Web Ex, and GoToMeeting. We recently conducted community presentations and interviews via a Zoom Webinar for the two finalists in the final stages of a search. We conducted two nights of presentations, managed community member questions, and utilized a Spanish interpreter to assist in conducting the meetings. Our firm has successfully completed searches over the past year that were conducted completely virtual, as well as hybrid models of in-person/virtual meetings and interviews.



**Recruit Phase**

We use a myriad of recruiting techniques to ensure we are reaching out to all potential candidates. The Recruit Phase consists of National and regional advertising packages for Board consideration and leveraging HYA's extensive national network of Associates and incorporating advertising strategies. Our Associates throughout the country are aware of outstanding Superintendents and aspiring Superintendents in their state and region and maintain close professional relationships with many educators and school district leaders who might be interested in making a job change or a career move. We have ongoing

relationships with state and national superintendent organizations and leaders so that they can recommend candidates to us. We have Associates who serve on the Boards of the *American Association of School Administrators*, the *Association of Latino Administrators and Superintendents*, and the *National Alliance of Black School Educators*. Associates are kept informed of the searches the firm is conducting and we seek recommendations from them regarding candidates who fit the profile being sought for that district. The proof of our recruiting network and efforts is the fact that approximately two thirds of the candidates ultimately selected by Boards with whom we work were recruited for the position rather than self-selected or self-nominated. The deliverables during the recruitment phase include:

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

## **SCREENING CANDIDATES**

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

Two additional steps are recommended towards the end of the selection process, before any public announcement: a comprehensive independent background check by an outside firm and a site visit. The comprehensive background checks can be conducted on the single finalist or on the three semi-finalists that the Board brings back for second interviews. These are not simple background checks by searching a social security number. The due diligence

background checks are conducted by a third-party entity and include checking on issues related to criminal and civil court records, financial records, driving records, college degrees and university accreditations. They can also include print and social media reviews. The site visit is optional, and is typically completed on the sole finalist once a selection is made but before a contract is signed.



## Select Phase

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

- Present a slate of candidates, the number of candidates to be determined by the Board with a recommendation from HYA;
- Conduct the Interview Workshop and provide materials and protocols to ensure informative effective Board interviews;
- Schedule interviews for the Board with selected semi-finalists and finalists;
- Facilitate Board discussion to narrow candidate pool after each round of interviews;
- Coordinate and provide third party, independent investigative background check(s) of candidates as selected and paid for by the Board;
- The Board's decision to hire or not hire a particular candidate is at the sole discretion of the Board; and the Board takes responsibility for that decision.

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

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

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



### **Transition Phase**

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

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

## **BOARD AND STAFF INVOLVEMENT/ASSISTANCE**

HYA has only three expectations for assistance of the District personnel in a successful superintendent search. First is the full participation by all board members in meetings, interviews, and discussions. We will plan a search calendar that can accommodate the schedules of individual board members, but once established, the expectation is that all board members will be available for critical meetings and activities, barring emergencies. The second expectation is that the HYA Associates will need the assistance of district personnel in identifying, inviting, and scheduling stakeholder groups and individuals for community engagement activities. Finally, we will also need the assistance of the District to get information posted on the District website.

## **ADDITIONAL POST SEARCH SERVICES OPTIONS**

HYA offers optional transition services included mentoring and coaching, Board Governance Workshops, Superintendent Evaluation, etc. Please the Appendix for additional information on options and pricing.

## **TIMELINE**

Our recruiting process is structured to take the time needed to find the right candidate. If for some reason the candidate pool does not yield the right match for the District, we continue to recruit and provide another slate for the Board's consideration until a new

Superintendent is selected. The following calendar is based on the timeline in the RFI and will be subject to change based on the Farmington Board member calendars.

<b>Farmington Search Tentative Calendar</b>	<b>Proposed Dates</b>
Planning Meeting with Board	2/15
Online survey open/close	2/19
Advertising	2/19
Leadership profile development interviews/focus groups	2/23-24
<i>Leadership Profile Report</i> presented to board	3/17
Application deadline	3/19
Seminar for interviews and final stages of search process	3/22
Slate presented to board	3/22
Board initial interviews	3/30,31,4/1
Boards meets to identify semi-finalists	4/2
Board interviews with semi-finalists	4/13-14
Third-party background checks	4/2-12
Board site visit	Optional
Announcement of appointment	4/18
Superintendent assumes responsibility	7/1
Retreat with new superintendent (optional)	To be determined after appointment of new Superintendent

## **COSTS**

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

- A. Search Fee** for the search in the amount of \$21,500. This fee is due in three installments:
- 50% will be invoiced upon execution of the contract/agreement
  - 25% will be invoiced upon presentation of the Leadership Profile Report
  - 25% will be invoiced upon presentation of the slate
- B. Advertising** on HYA’s webpage (over 18,000 page views on our Active Searches page per month) and social media pages are included in the consulting fee. Based on past experience, HYA has designed advertising packages to maximize exposure for the vacancy. Pricing varies from \$500 to upwards of \$6,000 depending upon if the Board

wishes to have online vs. print advertising, regional vs. national advertising, etc. Options and pricing for advertising services are attached.

**Optional Additional Services:**

- A. Associate Expenses (if applicable) for travel will be reimbursed by the Board. It is difficult to estimate Associate travel costs because it is unknown if the Board desires all in-person meetings or a hybrid of in-person/virtual meetings and stakeholder engagement. The proposed Associates are local, one lives 30 miles from Farmington, so the travel costs would be minimal. Mileage reimbursement is based on current IRS guidelines.
- B. If the Board chooses to reimburse candidates for travel for interviews, Candidates will submit the expenses directly to the District for reimbursement.
- C. Background checks/Executive Due Diligence Services: HYA Associates screen and conduct reference checks on candidates. HYA highly recommends an independent, third-party due diligence background check be used on the finalist(s). The cost ranges from \$1100 - \$1950 per candidate. See attached for investigative procedures and options.
- D. HYA is a green corporation and provides all search materials via an online portal. If the Board requests hard copies of the materials, the district will be invoiced to cover the costs of any printing, binding and shipping of materials.
- E. The Community and Leadership Profile Survey is offered in English and Spanish. If the district wishes to offer the survey in additional languages, the fee is \$415 per language. Please allow up to two weeks for translation. Custom requests will be quoted based on scope of customization.

**REFERENCES**

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

District Name and State	Reference Name	Contact Information
Birmingham Public Schools, MI	Kim Whitman	248.760.3011
Blue Valley School District 229, KS	Mike Seitz	913.226.7765
Fort Wayne Community Schools, IN	Julie Hollingsworth	260.750.0274

L'Anse Creuse Public Schools, MI	Terri Spencer	248.520.0334
Portage Public Schools, MI	Robert Snyder	269.381.3585
Traverse City Area Public Schools, MI	Sue Kelly	231.218.9800

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

## **ASSURANCES**

Dr. James Morse and Ms. Alena Zachery-Ross have a thorough, deep understanding of the educational and political context, governance, structure, landscape, policy and environment of Michigan. They will be in compliance with state and federal law pertaining to the selection and interviewing of candidates.

## **HYA GUARANTEE OF SERVICES**

### **Fixed Price**

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

### **Non-Solicitation of Selected Candidate**

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

### **Client-Satisfaction**

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

### **Price Match**

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

## **CONTACT PERSON**

Questions regarding this RFI response can be directed to Therese Meyer, Director of Operations. Contact Information: 847-250-7517 or [theresemeyer@hyasearch.com](mailto:theresemeyer@hyasearch.com).

**JAMES E. MORSE, Ed.D.**  
**(616) 292-1599**

**EDUCATION**

Wheaton College, Illinois	B.S. – Zoology and Chemistry
Northern Illinois University	M.S. – Ed. Administration
Northern Illinois University	Ed.D. – Ed. Administration

**PROFESSIONAL EXPERIENCE**

2010 – Present	<b><u>Senior Associate – Hazard, Young, Attea &amp; Assoc., Superintendent Search Firm, Schaumburg, Illinois</u></b> Superintendent Searches and Organizational Consultant in Michigan, Kansas and Ohio
2012 – 2014	<b><u>Academic Specialist – Michigan State University, East Lansing, MI</u></b> Consulting with Priority and Focus Schools in the State of Michigan, Schools in Kalamazoo, MI, Muskegon Hts, MI, and Muskegon, MI
2006 – 2010	<b><u>Assistant Professor – Educational Leadership Coordinator Fieldbased Ph.D. program</u></b> Western Michigan University The Graduate Center-Beltline, Grand Rapids, MI
1981- 2006	<b><u>Superintendent of Schools</u></b> East Grand Rapids Public Schools East Grand Rapids, MI 49506
1975 – 2006	<b><u>Visiting Professor – Graduate Courses</u></b> Michigan State University East Lansing, MI 48824
1975 – 1981	<b><u>Assistant Superintendent for Instruction</u></b> West Bloomfield Schools (5,800 students) West Bloomfield, MI 48033
1973-1975	<b><u>Associate Dean for On-Campus Affairs, Chairperson, Administration and Supervision, Professor</u></b> The Foster G. McGaw Graduate School National-Louis University, Evanston, Il

# ALENA E. ZACHERY-ROSS

## EDUCATION

Ed.D.	Michigan State University	In Process
M.A.	Wayne State University	1999
B.A.	Grand Valley State University	1995

## PROFESSIONAL EXPERIENCE

2018-Present	Superintendent of Schools Ypsilanti Public Schools, MI
2015- Present	Associate Hazard, Young, Attea & Associates, IL
2017-2018	Superintendent of Schools Okemos Public Schools, Okemos, MI
2012-2017	Superintendent of Schools Muskegon Heights Public School Academy, MI
2001-2012	Assistant Superintendent of Instruction Principal Teacher Consultant Van Dyke Public Schools, MI
1995-2000	School Psychologist Teacher Detroit Public Schools, MI

# SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

**2019**

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
<p>Las Lomas Elementary SD (CA) 1,300 students, K-8 John Earnhardt john.earnhardt@gmail.com</p> <p>Malveme Union Free School District (NY) 1,700 K-12 students Danielle Hopkins 516-216-3514</p> <p>Portola Valley School District (CA) 600 students, PK-8 Jeff Klugman jklugman@pvsd.net</p> <p>Watchung Borough School District (NJ) 650 students, PK-8 Jessica Ingrassia 323-420-9280</p> <p>Wyoming City Schools (OH) 1,950 students, K-12 Jeanie Zoller 513.379.3767</p>	<p>Berkeley Heights Public Schools (NJ) 2,700 students, K-12 Doug Reinstein 908-531-8181 dreinstein@bhpsnj.org</p> <p>Center School District (MO) 2,700 students, PK-12 Rebecca Lahann 816.456.1793 rlahann@center.k12.mo.us</p> <p>Freeport School District 145 (IL) 4,100 students PK-12 Janice Crutchfield janice.crutchfield@fsd145.org</p> <p>Lebanon Community Schools (OR) 4,340 students, K-12 Tom Oliver tom.oliver@lebanon.k12.or.us</p> <p>New Milford Public Schools (CT) 3,947 students, PK-12 Angela C. Chastain angela@angelachastain.com</p> <p>Mountain View-Los Altos HSD (CA) 4,300 students, 9-12 Dr. Phil Faillace 650.248.3375</p> <p>Rockville Centre UFSD (NY) 3,600 students, K-12 Tara Hackett 516-660-8400 tarahackettboe@gmail.com</p> <p>Willingboro School District (NJ) 3,400 students, PK-12 Carlos Worthy 609-232- 2230 cworthy@wboe.net</p>	<p>Port Washington Union Free SD (NY) 5,500 students, PK-12 Nora Johnson 917-690-9908 rjohnson@portnet.org</p> <p>Wenatchee Public Schools (WA) 7,700 students, PK-12 Sunny Hemphill hemphill.sunny@wenatcheeschools.org</p>	<p>Bayonne Public Schools (NJ) 9,800 students, PK-12 Joseph Broderick 201-988-1447 jbroderick@bboed.org</p> <p>Central Kitsap Schools (WA) 11,000 students, PK-12 Jeanie Schuize 360.908.5001</p> <p>Fairfield Public Schools (CT) 10,000 students, PK-12 Nick Aysseh 203.442.7255 naysseh@fairfieldschools.org</p> <p>Greater Albany Public Schools (OR) 9,627 students, K-12 Jennifer Ward 541.730.2270</p> <p>Medford School District (OR) 14,000 students, K-12 Cynthia Wright Cynthia.Wright@medford.k12.or.us</p> <p>Sewanhaka Central HSD (NY) 8,500 students, 7-12 David Del Santo 646.938.6500</p>	<p>ALAS (Association for Latino Administrators &amp; Superintendents), Washington D.C. Annie Ortiz 860.729.4749</p> <p>Academy School District 20 (CO) 26,200 students, PK-12 Tracey Johnson 719.491.2633</p> <p>Beaufort County SD (SC) 22,000 students, PK-12 Robyn Cushingberry 843.322.2357 or Christina Gwozdz ChristinaGwozdz@beaufort.k12.sc.us</p> <p>Denver Public Schools (CO) 92,000 students, PK-12 Anne Rowe annerowe60@gmail.com</p> <p>Edison Township Public Schools (NJ) 16,000 students, K-12 Ralph Errico ralph.errico@edison.k12.nj.us</p> <p>Glendale Unified School District (CA) 26,000 students, TK-12 Jennifer Freeman 818.388.1251 jfreemon@gusd.net Greg Krikorian 818.480.1327 gkrikorian@gusd.net</p> <p>School District of Indian River County (FL) 17,700 students, PK-12 Laura Zorc 772-205-4509 Laura.Zorc@indianiverschools.org</p> <p>Prince George's County PS (MD) 130,000 students, K-12 Erica Berry Wilson EBwilson1@co.pg.md.us</p>

# SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

**2018**

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
<p>Bonny Doon Elem. School District (CA) 163 students, PK-8 Amy McCabe 831.457.9912</p> <p>Greenburgh-Graham UFSD (NY) 150 students Jess Dannhauser Dannhauser.j@graham-windham.org</p> <p>Live Oak School District (CA) 2100 students, K-8 Jeremy Ray jray@losd.ca</p> <p>Loma Prieta Joint Union Elementary (CA) 941 students, PK-8 Deana Arnold d.arnold@loma.k12.ca.us</p> <p>Mount Pleasant Central SD (NY) 2,000 students, K-12 Thomas McCabe 914.874.6075</p> <p>Orange City School District (OH) 2,024 students, K-12 Melanie Wellman 216.378.6989</p> <p>Rumson-Fair Haven Regional HSD (NJ) 970 students, 9-12 Lisa Waters 732.616.0961</p>	<p>Flemington-Raritan Regional SD (NJ) 3,100 students, K-8 Tim Bart 908.797.7178</p> <p>Garden City School District (NY) 3,800 students, K-12 Angela Heineman 516.521.0304</p> <p>Lafayette School District (CA) 3,568 students, TK-8 Teresa Geringer 510.599.9152</p> <p>Lawrence Township PS (NJ) 3,800 students, PK-12 Dana Drake 201.527.8464</p> <p>Los Gatos Union Elementary SD (CA) 3,200 students, K-8 Peter Noymer 408.666.5510</p> <p>Los Gatos-Saratoga Union HSD (CA) 3,287 students, 9-12 Robin Mano rmano@lgsuhd.org</p> <p>Park City School District (UT) 4,973 students, PK-12 Andrew Caplan acaplan@poschools.us</p> <p>San Carlos School District (CA) 3,100 students, PK-8 Eirene Chen echen@scsd.k8.org</p>	<p>Boyetown Area School District (PA) 6,900 students, K-12 Steve Elsier 610-367-4697</p> <p>Hollister School District (CA) 5,500 students, TK-8 Elizabeth Martinez emartinez@hesd.org</p> <p>Lancaster ISD (TX) 7,200 students Ty Jones 214.802.3776</p> <p>Montclair School District (NJ) 6,700 students, K-12 Laura Herzog 973.699.1541 lherzog@montclair.k12.nj.us</p>	<p>Birmingham Public Schools (MI) 8,000 students, K-12 Kim Whitman 248.760.3011</p> <p>Chambersburg Area SD (PA) 9,000 students, PK-12 Alexander Sharpe 717.404.6179 alexander.sharpe@casdonline.org</p> <p>Davenport CSD (IA) 16,000 students, PK-12 Ralph Johanson 563.381.4598</p> <p>East Aurora SD 131 (IL) 14,000 students, K-12 Kimberley Hatchett 630.881.1243</p> <p>Helena Public Schools (MT) 8,200 students, K-12 Sarah Sullivan 406.465.1472</p> <p>Huntley CSD 158 (IL) 9,500 students, K-12 Tony Quagliano 847.254.2885</p> <p>Lawrence Public Schools (MA) 15,000 students, K-12 John Connolly 617-447-1302 johnconnolly@gmail.com</p> <p>New Bedford Public Schools (MA) 12,700 students Mayor Jonathan F. Mitchell 508.979.1410</p>	<p>Anaheim Elem. School District (CA) 18,000 students, K-12 Jackie Filbeck 714.883.6701</p> <p>Billings Public School District 2 (MT) 16,000 students, K-12 Greta Besch Moen 406.248.4360</p> <p>Crowley Independent SD (TX) 15,000 students, K-12 June Davis 847.437.1938</p> <p>Duval County Public School District (FL) 128,000 students, K-12 Paula Wright 904.390.2374</p> <p>Ector County Independent SD (TX) 30,000 students, PK-12 Doyle Woodall, 432.553.4115 dww831@yahoo.com</p> <p>Linn Benton Lincoln Education Service District (OR) 37,000 students Heather Search 541.812.2600</p> <p>Los Angeles USD (CA) 640,000 students, PK-12 Monica Garcia 213.505.6122</p> <p>Newark Public Schools (NJ) 35,000 students, K-12 Josephine Garcia 973-733-7333 j4garcia@nps.k12.nj.us</p> <p>Oceanside Unified School District (CA) 20,000 students, K-12 Ann Corwin 760.213.7285</p> <p>Stafford County PS (VA) 28,650 students, PK-12 DeWayne McOsker 540.751.8809</p>

**SELECT HYA SUPERINTENDENT SEARCH HISTORY  
WITH REFERENCES**

**2017**

0 – 3,000 students	3,001 – 5,000 students	5,001 – 7,500 students	7,501 - 20,000 students	20,001+ students
<p>Bexley City SD (OH) 2,274 students, K-12 Melissa LaCroix Melissa.Lacroix@bexleyschools.org</p> <p>Harvard CUSD 50 (IL) 2,400 students, PK-12 Sandra Theriault stheriault@cusd50.org</p> <p>Hunterdon Central Regional HS (NJ) 2,990 students, 9-12 Deborah Labbadia 908.616.8588</p> <p>Madison SD (NJ) 2,604 students, K-12 Lisa Ellis 201.400.2349</p> <p>Montecito Union School District (CA) 438 students, K-6 Katy Murphy kmurphy@montecitou.org</p> <p>Orinda Union Elementary SD (CA) 2,529 students, K-8 Julie Rossiter 925.408.1780 jrossiter@orinda.k12.ca.us</p> <p>Pelham Public Schools (NY) 2,800 students, K-12 Madeline Smith 646.209.5213</p> <p>Piedmont USD (CA) 2,706 students, K-12 Andrea Swenson 510.697.8567 aswenson@piedmont.k12.ca.us</p>	<p>Beacon City Schools (NY) 3,600 students, K-12 Meredith Heuer 917.447.6562</p> <p>Chappaqua Central SD (NY) 4,000 students, K-12 Allison Gardner 914.409.7696</p> <p>Concord Public Schools &amp; Concord-Carlisle Regional School District (MA) 3,355 students, K-12 Johanna Boynton 978.318.1500</p> <p>Duxbury Public Schools (MA) 3,250 students, PK-12 Anne Ward, awardux@verizon.net</p> <p>Jefferson UHSD (CA) 4,750 students, 9-12 Rosie Tejada 415.250.5123</p> <p>Manhasset Union Free SD (NY) 3,300 students, K-12 Regina Rule 914.602.1483</p> <p>North Shore SD 112 (IL) 4,309 students, PK-8 Eric Ephraim 847.541.0076</p> <p>Rescue Union SD (CA) 3,766 students, PK-8 Nancy Brownell, 916.769.7417</p> <p>Rye City SD (NY) 3,384 students, K-12 Katy Keohane Glassberg glassberg.katy@yeschools.org</p>	<p>Franklin Public Schools (MA) 5,447 students, PK-12 Kevin O'Malley 774.571.8486</p> <p>Hempstead Union Free School District (NY) 6,000 students, PK-12 Maribel Touré 516.434.4000</p>	<p>Alexandria City Public Schools (VA) 15,000 students, PK-12 Ramee Gentry 703.899.2637</p> <p>Clarke County SD (GA) 13,500 students, PK-12 Charles Worthy, 706.255.7795</p> <p>Crowley ISD (TX) 15,200 students, PK-12 June W. Davis 817.292.6092</p> <p>Cupertino USD (CA) 18,500 students, PK-12 Anjali Kausar 408.827.8336</p> <p>EI Rancho USD (CA) 8,800 students, PK-12 Dr. Aurora Villon, 562.965.8636</p> <p>L'Anse Creuse PS (MI) 12,000 students, K-12 Amy Servial 586.822.9302 amyservial@gmail.com Dr. Terri Spencer 248.520.0334 tmsedd@gmail.com</p> <p>Pleasanton Unified SD (CA) 15,000 students, PK-12 Joan Laursen 925-339-1763</p> <p>Richland SD (WA) 13,400 students, K-12 Rick Jansons, 509.528.3488 rick.jansons@rsd.edu</p> <p>Sequoia Union HSD (CA) 9,000 students, 9-12 Carrie DuBois cdubois@cbnorcal.com</p>	<p>Fairfax County PS (VA) 183,000 students, PK-12 Sandy Evans, 571.423.1083</p> <p>Garland ISD (TX) 57,400 students, PK-12 Larry H. Glick 972.475.4000</p> <p>Midland ISD (TX) 25,000 students, PK-12 Rick Davis 432.683.6686</p> <p>Portland Public Schools (OR) 49,200 students, PK-12 Amy Kohnstamm 503.913.3945</p> <p>Richmond City SD (VA) 22,000 students, PK-12 Dawn Pope 804.402.5000 Thomas Farrell 804.513.0523</p> <p>San Diego County Office of Ed (CA) 500,000 students Gregg Robinson 619.225.0377</p>

**SELECT HYA SUPERINTENDENT SEARCH HISTORY  
WITH REFERENCES**

**2016**

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 20,000 students	20,001+ students
<p>Brisbane SD (CA) 450 students, TK-8 Leo Tingin 415.269.4149 ltingin@brisbanesd.org</p> <p>Carlisle Public Schools (MA) 620 students PK-8 Melissa McMorrow 978.369.6550</p> <p>CCSD 89 – Glen Ellyn (IL) 2,000 students PK-8 Mike Nelson 773.469.7750</p> <p>Gravenstein Union SD (CA) 748 students K-8 Jim Horn 707.823.1052</p> <p>Harvey School District 152 (IL) 2,300 students PK-8 Gloria Johnson gjohnson@harvey152.org</p> <p>Richland SD88 (IL) 915 students, K-8 Julie Starasnich 815.690.0674</p> <p>Soquel Union Elementary SD (CA) 1,900 students PK-8 Judy McGooden 408.818.1263</p> <p>South Bend Community School Corporation (IN) 1,039 students K-12 Jay Caponigro 574.274.7269 jay@jaycaponigro.com</p> <p>Woodbridge School District (CT) 780 students, PK-6 Margaret Hamilton, 203.494.7591 mannham@sbcglobal.net</p>	<p>Bedford Central School District (NY) 3,600 students K-12 Jennifer Gerken 914.262.3526</p> <p>Laguna Beach USD (CA) 3,037 students K-12 Caro Normandin 949.497.7700 ext. 5202</p> <p>Minooka Community HSD #111 (IL) 2,700 students 9-12 Mike Brozovich mbrozovich@mchs.net</p> <p>New Albany-Plain Local SD (OH) 4,882 students PK-12 Debra Kalinosky dkalinosky@earthlink.net</p> <p>Walnut Creek ESD (CA) 3,600 students K-8 Katie Peña 925.287.0494</p>		<p>Campbell Union HSD (CA) 8,000 students 9 - 12 Linda Goytia 408.230.7414</p> <p>Carlsbad USD (CA) 11,000 students, K-12 Claudine Jones 760.331.5000</p> <p>Decatur Public School District 61 (IL) 9,000 students, PK-12 Sherril Perkins Perki@aol.com</p> <p>Fairfield Public Schools (CT) 10,000 students PK-12 Philip Dwyer dwyer_philip@yahoo.com</p> <p>Manchester School District (NH) 15,000 students PK-12 Debra Langton 603.669.8338</p> <p>San Dieguito Union High School District 12,400 students 7-12 Grade Beth Hergesheimer Beth.Hergesheimer@sduhsd.net</p> <p>Santa Barbara Unified SD (CA) 15,500 students PK-12 Kate Parker kparker@sbunified.org</p> <p>Stamford SD (CT) 16,000 students K-12 Geoff Alswanger 203.968.0233</p>	<p>Beaverton School District (OR) 40,725 students K-12 Anne Bryan 503.679.5040</p> <p>Blue Valley SD 229 (KS) 22,000 students PK-12 Mike Seitz 913.226.7765</p> <p>Houston ISD (TX) 215,000 students PK-12 Manuel Rodriguez 713.498.5649</p> <p>Humble ISD (TX) 41,000 students PK-12 Robert Siltton 281.450.2472</p> <p>Los Angeles USD (CA) 640,000 students PK-12 Steve Zimmer 213.241.6387</p> <p>Northwest ISD (TX) 21,000 students PK-12 Mark Schluter 817.948.6425 Josh Wright 682.472.1846</p> <p>Phoenix Union HSD (AZ) 27,000 students 9-12 Lela Alston 602.278.2002</p> <p>Providence PSD (RI) 24,000 students PK-12 Nicholas Hemond 401.453.8600</p> <p>Santa Ana Unified SD (CA) 56,000 students PK-12 John Palacio 714.542.0589</p>

# SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

**2015**

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 20,000 students	20,001+ students
Galt Joint Union High SD (CA) 2,300 students 9-12 Terry Parker Owning 209.810.0720	City Schools of Decatur (GA) 4,200 students PK-12 Annie Caiola 404.371.3601	Cambridge Public Schools (MA) 7,000 students PK-12 Mayor David Maher 303.249.6575 Barbara Allen 617.349.6441 ballen@cpsd.us	Bridgewater-Raritan RSD (NJ) 8,800 students K-12 Ann Marie Mead 732.216.7268 amead@brisd.k12.nj.us	Boston Public Schools (MA) 57,300 students PK-12 Michael O'Neill 617.947.2967
Highland Falls-Fort Montgomery CSD (NY) 1,000 students K-12 Anne Lawless 914.588.0384	Fayetteville-Manlius Central SD (NY) 4,420 students K-12 Marissa Joy Mims 315.682.3231	Centinela Valley Union HSD (CA) 6,600 students 9-12 Hugo M. Rojas II 310.263.3200	Eugene School District 4J (OR) 16,000 students K-12 Jim Torrey 541.790.7707	Colorado Association of School Executive (CO) Executive Director Diana Sirko 970.618.1829
Northbrook/Glenview SD 30 (IL) 1,130 K-8 students Chuck Gittles 847.498.4190 cgittles@district30.org	Freeport School District 145 (IL) 4,187 students PK-12 Janice Crutchfield janice.crutchfield@fsd145.org	Flint Community Schools (MI) 7,000 students PK-12 Isaiah Oliver 810.210.6823 isaiah.m.oliver@gmail.com	Franklin Township PS (NJ) 8,300 students PK-12 Edward Potosnak 732.745.1866	Montgomery County PS (MD) 154,000 students PK-12 Mike Durso 240.401.0674
Rockridge CUSD #300 (IL) 1,100 students PK-12 Jeff Widdop 309.793.8001	Mahopac Central School District (NY) 5,000 students K-12 Michael Scafani 914.939.1256	Hudson School District #2611 (WI) 5,600 students K-12 Jamie Johnson 751.381.7105	Jefferson County Schools (WV) 9,000 students PK-12 Scott Sudduth scottsud@gmail.com	Sioux Falls School District (SD) 23,000 students PK-12 Kent Alberty 605.941.3740
Salem Elementary SD111 (IL) 970 students PK-8 Terry Barnfield 618.267.0514	Montville Twp School District (NJ) 3,700 student K-12 Dr. Karen Cortellino Karen.Cortellino@Montville.net	Oak Park Elementary SD 97 (IL) 5,900 students PK-8 Bob Spatz bspatz@op97.org	Montgomery County PS (VA) 9,500 students PK-12 James Lyons 540-831-9864 joelylyons@mcps.org	
Saratoga Union School District (CA) 2,100 students K-8 Arati Nagataj 408.656.9137	Pemberton Township Schools (NJ) 5,000 students 9-12 Sandy Glawson glawson@pemb.org	Union Elementary SD (CA) 5,000 students K-8 Sheila Billings 408.888.3268	Orleans Parish School Board (LA) 11,000 students PK-12 Nolan Marshall, Jr. 504.460.1496	
Trevor-Wilmot Consolidated SD (WI) 565 students PK-8 Tom Steiner 262.862.2356			San Mateo-Foster City SD (CA) 12,000 students PK-8 Audrey Ng 626.862.4582	
			South San Francisco USD (CA) 9,375 students PK-12 Rosa Acosta 650.754.3672	
			West Allis-West Milwaukee SD (WI) 9,877 students PK-12 Patricia Kerhin 414.604.3000	

# Advertising Services

HYA Associates work with their clients to consider the many approaches to advertising vacant position(s). The HYA staff creates and coordinates all advertisements at the Board's direction. The HYA packages ensure exposure in the most frequently read print, e-publication journals, and job boards of educational leaders across the country. HYA has created other more focused advertisement options for the Board to consider as add-ons to the National Plan, including state and region-specific options. Whatever the Board chooses, HYA staff will write, place, and coordinate all the details.

Package 1 - \$1,999	Package 2 - \$3,025
One HYA group ad in Ed Week's print publication	Two HYA group ads in Ed Week's print publication
Online listing on AASA for 30 days with Online Spotlight, Preferred, and Featured upgrades	Online listing on EdWeek's TopSchoolJobs for 30 days & Showcased on the homepages for EdWeek and TopSchoolJobs for 7 days
Posting on the HYA Active Searches website	Online listing on AASA for 30 days with Online Spotlight, Preferred, and Featured upgrades
Milestone search updates on HYA's Facebook, LinkedIn, and Twitter	Posting on the HYA Active Searches website
Online listing on K12JobSpot for the length of the search	Milestone search updates on HYA's Facebook, LinkedIn, and Twitter
	Online listing on K12JobSpot for the length of the search

Package 3 - \$6,320
Listing in the HYA group ads in Ed Week's print publication for the length of the search
Dedicated District specific ad in Ed Week's print publication
Online listing on EdWeek's TopSchoolJobs for 30 days & Showcased on the homepages for EdWeek and TopSchoolJobs for 7 days
Online listing on AASA for 30 days with Online Spotlight, Preferred, and Featured upgrades
Posting on the HYA Active Searches website
Milestone search updates on HYA's Facebook, LinkedIn, and Twitter
Online listing on K12JobSpot for the length of the search



## Options to Complement the Advertising Packages

(Choose as many as desired.)

### Careerbuilder Network - \$488

Careerbuilder ad, linked to ASCD job ramp (Association for Supervision and Curriculum Development) for 30 days

### ALAS & NABSE - \$520

Association of Latino Administrators and Superintendents (ALAS) for 6 weeks online, push on ALAS apps

National Alliance of Black School Educators (NABSE) for 30 days

### Custom

Quoted price is based on number of Associations and frequency of ads to place

## Regional Packages

(Regional packages give your vacancy additional exposure in a specific geographic region. National Advertising, as detailed in packages 1, 2, and 3, should still be considered.)

### California - \$1,050

2 advertisements in the ACSA (Association of California School Administrators) EdCal CareerConnect print and 7 days online

CALSA (California Association of Latino Superintendents and Administrators) online advertisement for 30 days

Posting on the HYA Active Searches website

Milestone search updates on HYA's Facebook, LinkedIn, and Twitter

Online listing on K12JobSpot for the length of the search

### Northeast - \$1,050

NJASA (New Jersey Association of School Administrators)

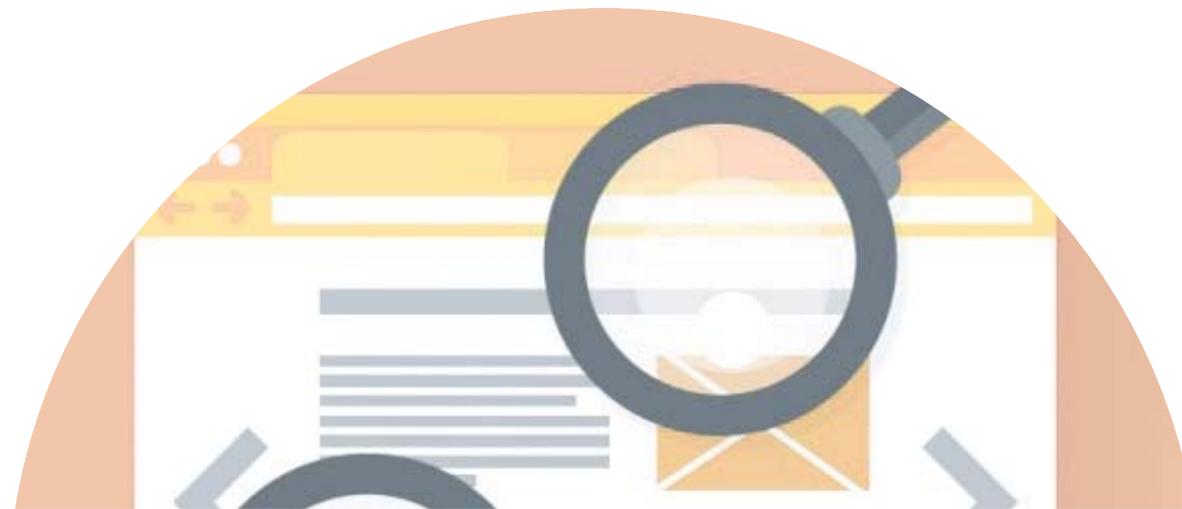
NYSCOSS (New York State Council of School Superintendents) online and newsletter

CAPSS (Connecticut Association of Public School Superintendents)

Posting on the HYA Active Searches website

Milestone search updates on HYA's Facebook, LinkedIn, and Twitter

Online listing on K12JobSpot for the length of the search



# Executive Due Diligence

HYA incorporates executive due diligence in the search process. The comprehensive and expanded background checks are completed by independent third-party investigators and include an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read. The investigative procedures are comprehensive and thorough with a focus on the public school landscape - well beyond what constituents will produce through a simple internet search. This includes on-site research of primary source documents at relevant county court houses for criminal record history. Each background search requires 7-10 working days to complete.

Two packages are offered. The Comprehensive Package includes a news and social media analysis. The news media investigation provides a better understanding of a candidate's leadership style, public relations skills and priorities. The news media investigation draws upon over 28,000 specialized publications and 900 newswires in 200 countries and includes 30 years of credible archived information. Special focus is given to publications in communities where the candidate has lived or worked. The social media review includes a review of text and images on sites such as Twitter, LinkedIn, personal blogs and industry websites. The analysis provides a summary of candidate generated activity with highlights of negative alerts.

The Basic package was designed in response to requests for a simpler cabinet or principal position background check; it does not include the news and social media analysis.

	Comprehensive \$1950	Basic \$1100
Personal Profile Summary	x	x
Social Security Trace	x	x
County Criminal Record History	x	x
Federal Criminal Record History	x	x
County Civil Record History	x	x
Department of Motor Vehicles License Information	x	x
Education (Degree) Verification	x	x
Transunion Credit Report	x	x
Investigation of all Aliases Identified within Past 7 Years	x	x
Investigation of all Jurisdictions of Residence, Education, and Employment within Past 7 Years	x	x
University and Academic Program Accreditation	x	x
National Criminal Record History	x	x
National Sex Offender Search	x	x
Executive Summary	x	x
News Media Review (5 year timeframe and up to 20 relevant articles)	x	
Social Media Review	x	

# Transition Services

HYA offers optional transition services that would benefit Boards and new Superintendents during the transition period and the Superintendent's first year in the school district.

## Board Governance Workshop - \$3000

The Board Governance Workshop requires 3-4 hours and provides the Board the opportunity to clarify the respective roles of the Board and the Superintendent. The workshop addresses the concepts of trusteeship, governance, management, continuous improvement and systematic change. Developing and maintaining effective Board-Superintendent relations, the need for long and short range planning, consensus decision-making, and other components of successful Board service are also discussed at this workshop.

## Board Goal Setting & Superintendent Evaluation - \$5000

To develop and maintain effective Board-Superintendent relations and provide the Board with an opportunity to determine what it desires to have the Superintendent achieve during his/her first two years in the position, goals and the evaluation process must be codified and understood with great clarity. The evaluation process should reinforce the concept of continuous improvement, and should monitor the achievement of the Board's goals. Processes and instruments for performance evaluation will be provided.

## Comprehensive First Year Support - \$15,000

This service includes both the Board Governance Workshop and the Board Goal Setting & Superintendent Evaluation service in addition to ongoing mentoring for the new Superintendent. The mentoring relationship will be designed with the HYA Associate and the new Superintendent with input from the Board. There is a focus on monitoring progress towards attainment of Board goals and facilitation of the Superintendent's first year evaluation.

## Strategic Planning - Quoted based on student population

Improving student outcomes begins with a clear and compelling vision for student success. When a new leader is appointed, a clear and concise strategic plan helps guide decisions and ensures energy is directed toward advancing the priorities of the community as directed by the Board. A disciplined strategic planning process allows school systems to engage stakeholders, build a consensus around what matters, and channel resources accordingly in order to ensure a maximum return on investments. A disciplined strategic planning process provides clarity of purpose as well as a structure to align the organization, its structures, and its policies. This service is typically a 3-6 month engagement.

## Governance Dashboards - Quoted based on student population

Governance dashboards help to facilitate, launch, and govern implementation of the district's strategic plan and give meaningful data for the Board to evaluate the impact and return on investment that strategic goals are having on student achievement, financial, and other system outcomes. The strategic dashboard provides a framework for the Board and Superintendent to communicate the priorities and progress of the school system to the community. This service is a continued service from year to year.

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HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847-724-8465 or at [hya@hyasearch.com](mailto:hya@hyasearch.com) with questions or requests for additional information.

**Hazard, Young, Attea & Associates**  
1475 E. Woodfield Rd, 14<sup>th</sup> Floor  
Schaumburg, IL 60173  
(847) 724-8465

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[www.hyasearch.com](http://www.hyasearch.com)

# *A Proposal for the Selection of a Superintendent*

*Presented To:*



*Submitted By:*

*Ray and Associates, Inc.*

**CORPORATE OFFICE**  
901 17<sup>TH</sup> STREET NE  
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*Finding Leaders for America's Schools*

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**Ray and Associates, Inc.**  
*Leaders in Executive Searches*

January 16, 2021

Farmington Public Schools  
ATTN: Mrs. Terri A. Weems, President  
32500 Shiawassee  
Farmington MI 48336

Dear Mrs. Weems and Members of the Board of Education:

This letter is in response to a request regarding the need for our services to assist you in the search for a new Superintendent. We are confident the Board will be quite pleased with the services we can provide. We have been very successful in providing Superintendent search services for districts that are similar in terms of size, cultural diversity and geographic location.

As I am sure you are aware, the selection of Superintendent will be one of the most important activities your Board will perform. The Board's success in the search process will affect your school district's education program for years to come. It is extremely important to find the "right fit" for the District.

We are familiar with Michigan and are prepared to comply with state and federal law pertaining to the selection and interviewing of candidates. We recently conducted the search for the current State Superintendent. Additionally, we recently completed Superintendent searches for Grand Rapids Public Schools, Bloomfield Hills Schools and Benton Harbor Area Schools and previously assisted Detroit Public Schools Community District, Ecorse Public Schools, Kalamazoo Public Schools, Ann Arbor Public Schools, West Bloomfield School District, Plymouth-Canton Community Schools and St. Johns Public Schools, Michigan. In the Midwest region we have conducted Chief Administrator searches for the Northwest Area Education Agency, Green Hills Area Education Agency and Grant Wood Area Education Agency, Iowa. Additionally, we have conducted Superintendent searches for Berlin Area School District, Oshkosh Area School District, Manitowoc Public School District, Green Bay Area Public Schools, Racine Unified School District, Kenosha Unified School District and Milwaukee Public Schools, Wisconsin; Proviso Township High Schools District 209, Indian Prairie School District 204, Orland School District 135, Butler School District 53, Rock Island-Milan School District #41, Hazel Crest School District 152½, Highland Park School District, Joliet Public Schools, Glenbrook North and South High Schools, West Northfield School District, Township High School District 113, Harrison School District 36, Glen Ellyn School District 41, East Aurora School District 131 and Bradley-Bourbonnais 307, Illinois; Geary County Schools USD 475, Kansas City Kansas Public Schools, Pittsburg Community Schools USD 250, Lawrence Public Schools, Shawnee Mission School District, Olathe Public Schools, Topeka Public Schools and Dodge City Public Schools, Kansas; Hickman Mills C-1 School District, Joplin Schools, Kansas City Public Schools, Ferguson-Florissant School District, Missouri; Cleveland Heights-University Heights City School District, Shaker Heights City Schools, Cincinnati Public Schools and Lorain City Schools; Ohio; Williston Public School District No. 1, Dickinson Public Schools and Fargo Public Schools, North Dakota; Lakeville Area Public

Schools, Minnesota; Vermillion School District and Brookings School District, South Dakota; Westside Community Schools, Omaha Public Schools, Papillion-La Vista Public Schools and Lincoln Public Schools, Nebraska.

Nationally, we have assisted Tangipahoa Parish School System, Louisiana; Savannah-Chatham Public School System and DeKalb County School District, Georgia; Lynchburg City Schools, Williamsburg-James City County Public Schools, Norfolk Public Schools, Montgomery County Public Schools, Newport News Public Schools and Prince William County Public Schools, Virginia; Maury County Public Schools, Knox County Schools, Oak Ridge Schools, Sumner County Schools and Memphis City Schools, Tennessee; Jackson Public Schools, Mississippi; North Little Rock School District, Pulaski County Special School District, Fort Smith Public Schools, Rogers Public Schools, Mountain Home Public Schools and Fayetteville Public Schools, Arkansas; Marion County Public Schools, Hillsborough County Public Schools, Lake County Schools, the School District of Palm Beach County, Florida State University Schools, Brevard Public Schools, Broward County Schools and Collier County Public Schools, Florida; Waxahachie ISD, Austin ISD, Plano ISD, Lewisville ISD, Fort Worth ISD, Killeen, ISD and Socorro ISD, Texas; Beaufort County School District, Jasper County School District and Richland County School District One, South Carolina; Waterbury Public Schools, Bridgeport Public Schools, Greenwich Public Schools, Hartford City Public Schools and Consolidated School District of New Britain, Connecticut; Wyandanch Union Free School District, Amityville Union Free School District and Rochester City School District, New York; Baltimore County Public Schools, Anne Arundel County Public Schools, Baltimore City Public Schools, Howard County Public School System and Prince George's County Public Schools, Maryland; Millcreek Township School District, Woodland Hills School District, Lewisburg Area School District, Wissahickon School District, Derry Township School District, Spring-Ford Area School District and Benton Area Public School District, Pennsylvania; Teaneck Public Schools, Paterson Public Schools, Trenton Public Schools, East Orange School District, Camden City Public Schools and Marlboro Township Public Schools, New Jersey; Balsz School District, Marana Unified School District, Roosevelt Elementary School District and Deer Valley Unified School District, Arizona; Poway USD, San Ysidro School District, Albany USD, Berkeley USD, Pasadena USD and Emery USD, California; Hawaii School for Deaf and Blind, Hawaii; Blaine County School District, Idaho; Matanuska-Susitna Borough School District, Alaska; Clark County School District, Nevada; Albuquerque Public Schools, Los Alamos Public Schools and Santa Fe Public Schools, New Mexico; Edmonds School District, Granite Falls School District, Everett Public Schools, Lake Washington School District, Snoqualmie Valley School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Kent School District, Federal Way Public Schools and Northshore Public Schools, Washington; Hood River County School District, Lake Oswego School District and Gresham-Barlow School District, Oregon; Missoula County Public Schools, Montana; The Colorado School for the Deaf and the Blind, Colorado Springs School District 11, Douglas County School District, Boulder Valley School District, Sheridan School District No. 2, Jefferson County School District and Eagle County Schools, Colorado.

We have also assisted the Michigan Department of Education, Alabama Department of Education, Hawaii Department of Education, Colorado Department of Education, Ohio Department of Education, Florida Department of Education, Rhode Island Department of Education, West Virginia Department of Education and Wyoming Department of Education with their State Superintendent searches.

We are currently leading searches for North Clackamas School District, Oregon; Columbia Public Schools, Missouri; Andover Public Schools, Massachusetts; Greenburgh Area School District and the City School District of New Rochelle, New York; Champaign Unit 4 School District and DeKalb CUSD 428, Illinois; Urbandale CSD, Iowa; Salt Lake City School District, Utah; and Kingman-Norwich USD 331, Kansas; in addition to many others across the nation.

We are a national search firm that is uniquely equipped to assist you in the selection of a Superintendent who meets your particular needs and qualifications. We will not only advertise, but also actively recruit potential candidates that will meet the criteria established by your Board, including women and minorities. Most other search firms do not seek out candidates for a position as we do for our clients. With our extensive regional and national associate base, Ray and Associates, Inc. will be able to recruit quality candidates from around the country, as well as within the state. We have often found excellent in-state candidates who would not otherwise have applied for the position due to a possible conflict of interest with a state or local firm. Our professional, objective procedures allow us to attract, process and screen the most successful candidates for a Superintendent position. You will also find our system is flexible, which allows us to customize the search to meet the desires of the Board.

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty-five (45) years. This year the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients.

It is our goal to make the selection process professional, efficient and successful to assure your complete satisfaction with our services. It is quite common for a Board to be concerned about the quality of candidates who might be available in today's job market. Outstanding administrators will need to be recruited regardless of the time of year or the position needing to be filled because many of these school leaders already have good jobs. We feel that our firm can be very successful in attracting candidates that will meet or exceed your expectations. With a consulting firm of associates located nationwide, Ray and Associates, Inc. has been able to develop the most comprehensive pool of candidates of any executive search firm in the country. Our reputation for success is built upon providing school districts precisely the type of candidate that satisfies not only the Board but the community and faculty as well.

Ray and Associates, Inc. strives to provide the District with the best match possible based on what we learn in our extensive interaction with the Board and key players in the search. It is our desire to activate our network on your behalf to locate individuals that can effectively assume the top executive post in your District.

We welcome the opportunity to make a presentation of our services at your convenience. If you have any further questions or comments regarding the enclosed information, please do not hesitate to contact our Cedar Rapids office at 319-393-3115.

Sincerely,

A handwritten signature in black ink, appearing to read 'M Collins', written in a cursive style.

Michael Collins  
President

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# INTRODUCTION

## THE SEARCH

This Proposal is an example of the quality of our work for a state, regional and national search. Our firm is committed to spending the time and energy on the details necessary to perform a proper search. *We actively seek out and screen all candidates who are recruited during the search to identify those who are superior and who meet or exceed the qualifications set by the Board.*



*RA*  
*Ray and Associates, Inc.*

## BRIEF OVERVIEW

This document is designed to demonstrate that we desire to provide you with a complete, detailed package customized to the Farmington Public Schools in a performance contract regarding our professional services for your Superintendent search.

Our Proposal consists of our consultant services, general provisions, confidentiality, satisfaction guarantee and consultant cost.

## PERFORMANCE

We have developed highly effective procedures to assist schools, step by step, in selecting a Superintendent whose qualifications meet its criteria. This Proposal outlines the detailed procedures and steps that make our searches successful. *We have been highly successful in delivering outstanding candidates in all of our searches.*

### *MISSION STATEMENT*

*RA*  
*Ray and Associates, Inc.*  
*Leaders in Executive Searches*

We will provide our clients with the highest quality services to assist them in hiring leaders who will meet District specific needs and positively impact the education of all students.

# HISTORY AND OVERVIEW OF THE ORGANIZATION

## PROFILE OF THE FIRM

Ray and Associates, Inc. is a professional organization that specializes in school executive leadership searches. The firm has been in the school executive search business since 1975 and has established an outstanding reputation. The firm has been recognized by The School Administrator journal as one of the top search firms in the country. Our professional consultants, including women and minorities, are persons with long-term experience in the school executive search field, with extensive backgrounds as school administrators, business executives, school board members, university professors and attorneys. All of the consultants within the firm have years of experience in the school executive search field.

Ray and Associates, Inc. is an independent and objective firm that does not accept placement fees from any candidate. We have designed a highly effective procedure that allows us to impartially assist schools in selecting the best individual for their particular needs.

In addition to our corporate office located in Cedar Rapids, Iowa, we have associates located throughout the country. Therefore, distance is not a factor to our firm when meeting with our clients.

The corporate office also maintains a full-time administrative staff to assist in the executive search business.

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty-five (45) years. This year the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients. We also have associates who are affiliated with the Council of Great City Schools, Urban Superintendents Association of America, the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE), as well as other professional organizations.

Exhibiting at state and national conventions allows the firm to meet and recruit outstanding administrators for our client districts. As a result, Ray and Associates has access to the most comprehensive pool of candidates of any executive search firm in the country.

It is only a matter of reality that outstanding administrators already have good jobs and need to be recruited. We are familiar with Michigan as we recently conducted the search for the current State Superintendent. Additionally, we recently completed Superintendent searches for Grand Rapids Public Schools, Bloomfield Hills Schools and Benton Harbor Area Schools and previously assisted Detroit Public Schools Community District, Ecorse Public Schools, Kalamazoo Public Schools, Ann Arbor Public Schools, West Bloomfield School District, Plymouth-Canton Community Schools and St. Johns Public Schools, Michigan. In the Midwest region we have conducted Chief Administrator searches for the Northwest Area Education Agency, Green Hills Area Education Agency and Grant Wood Area Education Agency, Iowa. Additionally, we have conducted Superintendent searches for Berlin Area School District, Oshkosh Area School District, Manitowoc Public School District, Green Bay Area Public Schools, Racine Unified School District, Kenosha Unified School District and Milwaukee Public Schools, Wisconsin; Proviso Township High Schools District 209, Indian Prairie School District 204, Orland School District 135, Butler School District 53, Rock Island-Milan School District #41, Hazel Crest School District 152½, Highland Park School District, Joliet Public Schools, Glenbrook North and South High Schools, West Northfield School District, Township High School District 113, Harrison School District 36, Glen Ellyn School District 41, East Aurora School District 131 and Bradley-Bourbonnais 307, Illinois; Geary County Schools USD 475, Kansas City Kansas Public Schools, Pittsburg Community Schools USD 250, Lawrence Public Schools, Shawnee Mission School District, Olathe Public Schools, Topeka Public Schools and Dodge City Public Schools, Kansas; Hickman Mills C-1 School District, Joplin Schools, Kansas City Public Schools, Ferguson-Florissant School District, Missouri; Cleveland Heights-University Heights City School District, Shaker Heights City Schools, Cincinnati Public Schools and Lorain City Schools; Ohio; Williston Public School District No. 1, Dickinson Public Schools and Fargo Public Schools, North Dakota; Lakeville Area Public Schools, Minnesota; Vermillion School District and Brookings School District, South Dakota; Westside Community Schools, Omaha Public Schools, Papillion-La Vista Public Schools and Lincoln Public Schools, Nebraska with their educational leadership searches. Our network and recruiting efforts are second to none. We bring a wealth of experience and knowledge to your District focused upon our goal to make the selection process professional, efficient and successful so we can state, without reservation, that you will be quite pleased with our services.



## THE TEAM

Ray and Associates, Inc. is a professional organization which specializes in the field of educational leadership searches. We are uniquely equipped to assist you in the selection of a Superintendent who meets the particular needs and qualifications of the Farmington Public Schools. We have:

1. Highly trained and experienced staff that includes:
  - *Active school administrative leaders*
  - *A balance of gender and minority representatives*
2. Expertise and extensive background in:
  - *The school superintendency*
  - *School administration at all levels*
  - *Private business, higher education and law*
3. Experienced speakers at state, regional and national conferences.
4. Conducted workshops and seminars in school related matters such as:
  - *Building the successful Board/Administrator relationship*
  - *Establishing an evaluation process that yields results*
  - *Interviewing for a Superintendent position*
  - *What Boards should consider when selecting a Superintendent*
  - *School district assessment*
  - *Effective hiring practices*
  - *Staff and organizational development*
  - *Recruiting, selecting and retaining excellent teachers*
  - *Enhancing school climate by shared decision making/dealing with special interest groups*
  - *Developing the compensation package or contract*

## KEY ASSOCIATES FOR THE PROJECT

The following principal/project coordinators will be actively involved in working with the school district. The associates listed below will be assisting in recruitment, screening and background checks. The firm chooses various associates across the country to be sure that every region will be covered to recruit the best candidates for the Farmington Public Schools. In addition, we have professional contacts throughout MIchigan, the midwestern region and nationally. The following is only a partial list of associates who will be involved in the recruitment and screening of candidates. The firm will actually involve many more associates for the project.

### **Mr. Michael Collins, President**

**Please feel free to contact with any questions, concerns or clarification**

**[michael@rayassoc.com](mailto:michael@rayassoc.com)**

**319-393-3115**

President/Columbus, OH

Mike is President of Ray and Associates, Inc. He oversees all searches conducted by the firm and will directly interact with Farmington Public Schools and any committee that may be established on all details of this search. He has a Bachelor's degree in Secondary Education from Miami University and a Master's degree in Education from Ball State University. Mike has been a business owner for 37 years including a statewide education consulting firm. He is also a former two term city school district Board of Education member and a former two term elected State Board of Education member.

### **Ms. Molly Schwarzhoff, Executive Vice President**

**Please feel free to contact with any questions, concerns or clarification**

**[molly@rayassoc.com](mailto:molly@rayassoc.com)**

**319-393-3115**

Executive Vice President/Cedar Rapids, IA

Molly is Executive Vice President of Ray and Associates. She oversees all searches conducted by the firm and will directly interact with Farmington Public Schools and any committee that may be established on all details of this search. She attended Iowa State University and has been with Ray and Associates for 7 years.

### **Mr. Craig Morris**

Regional Search Associate/Lakeland, MN

Craig serves our firm as a Regional Search Associate, team member and background investigator and as such performs the recruiting and screening of candidates. He received his Bachelor's degree in Public Administration/Business from the University of St. Thomas and a Master's degree in Management Organizational Effectiveness from Stritch University. Craig's background spans over thirty years of recruitment, planning, compliance and leadership in the fields of education and aviation management.

### **Dr. Karen Hall**

Regional Search Associate/St. Louis, MO

Karen serves our firm as a Regional Search Associate, team member and background investigator and as such performs the recruiting and screening of candidates. She received a Bachelor's degree in Education from Fontbonne College, a Master's degree in Administration from St. Louis University and a Doctorate of Education from Webster University. She has extensive experience in the education field having served as a Teacher, Assistant Principal, Principal, Assistant Superintendent and most recently as Superintendent all in the State of Missouri.

# SECTION I

## CONSULTANT SERVICES PROVIDED FOR FARMINGTON PUBLIC SCHOOLS THE CONSULTANT WILL:

### STAGE 1 - BOARD INPUT AND PREPARATION

1. Provide all services as outlined in Sections I, II, III and IV.
2. Customize the search process to meet the needs and expectations of Farmington Public Schools.
3. Conduct individual Board member interviews to assess the Board's priorities, goals and objectives to aid in the development of the criteria and qualifications for the Superintendent position.
4. Work with the Board to establish a timeline that lists each step in the search process.
5. Discuss with the Board the requirements and salary range for the Superintendent position.
6. Work with Farmington Public Schools staff and those selected by the Board in the development of an accurate informational flyer and online application form. If desired, our office staff has the experience and capability to create the District's promotional flyer.

### STAGE 2 - PROFILE DEVELOPMENT AND PROCESS

7. If desired, provide a proven consensus building mechanism for obtaining input from various constituencies, staff members, other stakeholders and the Board. In addition, our firm has the resources to offer an online survey option in many languages at no additional fee. We will provide a link to the survey to post on the District's website. The consultants will receive and organize all input data and then report the results to the Board.
8. Provide the Board with cost saving options to minimize expenses by utilizing Zoom, conference calls or gotomeetings to reduce paper copies, travel expenses and shipping costs.
9. Develop all required forms for the application and screening process.

### STAGE 3 - RECRUITING AND SCREENING

10. Conduct all aspects of the recruitment process on a statewide, regional and national basis as follows:
  - Notify all associates to actively recruit potential candidates.
  - Contact individuals in our firm's database whose interests match District criteria.
  - Actively recruit applications from qualified individuals.
  - Solicit nominations from knowledgeable people in the profession.
  - Contact other professional consultants in private and public sectors.
  - Discuss with all candidates the District's characteristics and the Board of Education's profile and criteria for the new Superintendent position.
  - Advertise nationally in the following as selected by the Board: AASA Website, Education Week Newspaper and Website, Ray and Associates Website, the Michigan Administrators and Michigan Association of School Boards Publications, The School Administrator Publication, Executives Only Website, the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE) and other publications selected by the Board.

### STAGE 3 - RECRUITING AND SCREENING – CONTINUED

11. Develop and manage the candidate screening process. All applicants are screened from the perspective of a viable match with District criteria to determine their capabilities, strengths and weaknesses. The search team thoroughly reviews each file and seeks alignment of qualifications with District expectations. Those who emerge successfully from this screening are deemed viable candidates.
12. Check references provided and conduct additional background investigation of top candidates. Our firm interviews each viable candidate that meets Board criteria and verifies their qualifications and experience. Our background research team then conducts extensive investigations on those individuals. The investigations go well beyond listed references and their current position. A complete check of a candidate's work history is also completed utilizing online resources such as Google, Yahoo, Facebook, Twitter and other social media sources as well as checking for blogs.

### STAGE 4 - CANDIDATE PRESENTATION

13. Provide the Board with an opportunity to observe each top candidate interviewed with questions specifically designed by Ray and Associates, Inc. through video technology. This will allow Board members to get a better perspective of each candidate in order to determine which candidates to interview. By offering this opportunity, this will save the Board members on expenses and their time.
14. Provide an impartial and objective consensus building matrix instrument developed by Ray and Associates to assist the Board in determining the finalists for an interview. We have been extremely effective working with Boards who are divided on issues and candidates.
15. Assist the Board in establishing the interview format and in developing interview questions.
16. Determine and coordinate constituent and staff involvement in the interview process, if desired by the Board.
17. Help arrange the details of interviews for leading candidates.
18. Provide the Board with criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.
19. Coordinate with the Farmington Public Schools Business Office the procedure for reimbursement of candidate's expenses.

### STAGE 5 - SELECTION OF FINALIST AND FUTURE PLANNING

20. Assist District legal staff in negotiating the contract with the successful candidate at no additional cost to the District.
21. After the appointment, dispose of the files and send appropriate communications to the candidates not interviewed by the Board.
22. If desired, assist the District in preparing a press release, upon request, announcing the appointment of the new Superintendent.
23. Provide the Board with a report of the Board Self-Assessment Survey Results at no additional cost.

The Superintendent search services and process provided above can be adjusted to meet the specific needs of the Farmington Public Schools.

## WORKING WITH BOARD THROUGH EACH STAGE OF SEARCH

**Stage One** is Board Input and Preparation. The firm will meet with each Board member individually to obtain input for the profile development and meet with the entire Board to set the timeline for the search, finalize procedures and services desired by the Board, establish the Board contact person(s), discuss the application process, set the advertising and determine the salary.

**Stage Two** is the Profile Development and Process. Our firm takes the development of the profile very seriously. We will meet with employees and stakeholders as identified by the Board. We also will hold morning and evening open forums to collect input from the community. The purpose of the interviews and meetings are to gather and organize information that will contribute to the development of an accurate profile for the position. The Board will have the opportunity to review our recommendations and make the final decision on the desired profile.

**Stage Three** of the process is Recruiting and Screening. The firm's dialogue with constituents and interviews with individual Board members, coupled with survey results, provide our firm with an accurate profile that is employed in the recruiting and screening of applicants.

**Stage Four** is Candidate Presentation. Ray and Associates will bring before the Board 8-12 top candidates for their consideration. Board members will have the opportunity to not only review the application packet submitted by each top candidate but they will also have the opportunity to observe each top candidate interviewed with questions specifically designed to the search through video technology. This will allow Board members to get a better perspective of each candidate in order to determine which candidates to interview. In addition to the top candidate packets provided to the Board, we will have available to the Board each and every completed file for their perusal if they so choose.

Upon the completion of the review, Board members will be asked to individually complete a matrix which allows them to assess each top candidate against the others. The Ray and Associates representative will then provide the Board with a summary of the individual Board responses. This summary assists the Board members in reaching consensus on which candidates are worthy of an interview. Following these steps ensures that all Board members have an equal opportunity to be involved in the selection process. Ray and Associates will assist the Board in establishing the interview format and in developing interview questions.

**Stage Five** is the Selection of the Finalist and Future Planning. At the conclusion of the last interview, the representative from Ray and Associates will once again be onsite to lead the Board through a similar consensus building activity which has proven to be very successful in assisting Board members to reach a final determination of their finalist(s). It is also requested by some of our client school boards that the top two (sometimes three) finalists are brought back to the District for an open forum with the public. We provide a proven process for this as well that includes a moderator. Questions from the audience are submitted in writing to ensure that the candidates are only asked about legitimate issues related to the position.

We believe strongly that this process allows the final selection of candidates to be in the control of the Board. When Boards are provided with a limited number of candidates from whom to consider, the Board has only limited involvement in the search process. Through the outstanding discussions fostered by the consensus building instrument provided by Ray and Associates, Board members have overwhelmingly been appreciative of their strong involvement.

## POINTS OF EXPERIENCE IN TIME OF COVID-19

During this unprecedented time of COVID-19, we, along with other firms, have had to adapt our way of thinking and practices in order to accomplish the task at hand – finding your next Superintendent.

We had searches in various stages when the outbreak of COVID-19 hit forcing school districts to close and states to issue shelter in place orders. Some of the ways we have adapted our search experiences are as follows:

1. First meetings with the Board and Board one-on-one interviews can be conducted electronically or by phone.
2. In addition to our current electronic 33 qualities survey, and in lieu of in person stakeholder meetings, we have conducted stakeholder meetings via Zoom with groups and members chosen by the Board/district.
3. Another option used to gather stakeholder/constituent group input is to place the stakeholder questions into Survey Monkey and providing the district with links for each group which they then distribute to the selected members of each respective group. Upon closure of the survey, we review and compile responses to the stakeholder questions. This information is used internally to assist in finding common themes, names of suggested candidates and possible interview questions.
4. If presenting the candidate packets to the Board in person is not an option, we can conduct a meeting via Zoom or other electronic means where we would provide the Board with links to the candidate packets as well as the one-way candidate Spark Hire videos.
5. If needed, candidate interviews can also be conducted electronically. We know this is not ideal, but it can be utilized to keep the process moving.
6. We realize an important part of the process is to have stakeholders meet the candidates. If that is not possible due to current conditions, we suggest an electronic forum for each candidate whereby the community can submit questions, a moderator would then compile the questions into a select number (given the time allotment) of various topics, and then ask those questions to the candidates (i.e. 30 minute time limit, 2 minutes per question, going alphabetically by candidate with one candidate completing their 30 minutes followed by the next candidate). If district technology allows, these forums would then be shown on the district meeting site or YouTube site.
7. This is YOUR search. We will work with you to devise a plan that works for you!

# INCLUSION, EQUITY AND ELIMINATION OF INSTITUTIONAL RACISM

During these challenging times we articulate our organizational commitment to identifying and acting upon the changes that are needed to bring about inclusion, recognize the need for equity, and eliminate institutional racism.

**We recognize social injustice, systemic racism, socio-economic limitations and the disparities associated with the identification and placement of school district leadership personnel. Furthermore, this recognition has not only guided our recruitment and placement of school district leaders, it directly impacts our recruitment and selection of our search Associates and national office personnel.**

**Therefore, we will:**

- **Declare inclusion as an organizational core value;**
- **Engage in intentional conversation and behavior around diversity and equity;**
- **Identify social justice as a behavior model impacting our school search practices;**
- **Recognize systemic racism as an equity problem for children's access to a fair, thorough and effective public education;**
- **Place equity, inclusion and diversity as major tenant of practice; and**
- **Use our voices and practices as instruments for change.**

As a broad-based representative, nationwide organization that focuses on the delivery of leadership search and selection services to school districts, we commit ourselves to the statements above.

Additionally, we will continue to ask ourselves the appropriate questions that help us focus on the delivery of our respective services through the lenses of integrity, equity, social justice and inclusion.

Finally, we will continue to bring forward the organization's forces of institutional leadership, advocacy, scope of representation, levels of expertise and spheres of influence in these areas from this day forward.

**Join us as we: WORK together, ASK questions, LISTEN fully, and ACT meaningfully!**

# FARMINGTON PUBLIC SCHOOLS

## SUPERINTENDENT SEARCH **SUGGESTED** PROCESS AND TIMELINE

*Items highlighted in yellow indicate an in-person meeting with the consultant(s)*

DATE

Stage 1 Board Input & Preparation	<p>_____ Consultant planning meeting with the Board and individual Board member interviews. <b>(Time: TBD)</b> (option to conduct via Zoom, conference call or gotomeetings.com)</p> <p>_____ Begin preparing information for the District promotional flyer and online application form with the District liaison representative(s).</p> <p>_____ Notify all associates and other professional contacts of vacancy.</p> <p>_____ Contact constituents and stakeholders for input meetings on _____.</p>
Stage 2 Profile Development & Process	<p>_____ Online survey link, for input on developing the profile, available on District website from _____ to _____.</p> <p>_____ <b>Meetings with constituent and stakeholder group representatives.</b></p> <p>_____ 8 a.m. deadline for survey/input from constituents, stakeholders and Board members, including online survey.</p> <p>_____ Promotional flyer draft due.</p> <p>_____ <b>Board to finalize Superintendent profile for the promotional flyer and online application form. (Time: TBD)</b> (option to conduct via Zoom, conference call or gotomeetings.com)</p>
Stage 3 Recruiting & Screening	<p>_____ Print promotional flyer. Forward to consultant.</p> <p>_____ E-mail promotional flyer and online application instructions to interested candidates.</p> <p>_____ Deadline for all application materials. <i>(*See note below.)</i></p>
Stage 4 Candidate Presentation	<p>_____ <b>Consultant develops and finalizes interview questions and procedures with the Board. Top candidates are presented to the Board and consultant assists the Board in selecting finalists for the interviews. If desired by the Board, consultant will meet with constituents and staff interview group(s) to discuss their roles. (Time: TBD)</b></p> <p>_____ Interview candidates (1<sup>st</sup> round).</p> <p>_____ <b>Meeting with consultant following the last interview. (Time: TBD)</b></p>
Stage 5 Selection of Finalist & Future Planning	<p>_____ Interview finalist candidates (2<sup>nd</sup> round). <i>(Optional)</i></p> <p>_____ <b>Final meeting with consultant following the last interview. (Time: TBD)</b> (option to conduct via Zoom, conference call or gotomeetings.com)</p> <p>_____ Consultant will discuss contract terms with the finalist.</p> <p>_____ Offer the contract.</p> <p>_____ Press release of new Superintendent.</p> <p>_____ Board Self-Assessment Survey Results presented to the Board.</p>

**\*All applications will be reviewed. Materials received after the closing date may be given full consideration depending upon the number of applications received and other factors.**

(Actual dates to be determined in the first meeting with the Board.)

## BUILDING THE PROFILE

Ray and Associates, Inc. firmly believes in parent, staff and community participation, especially in the development of an accurate profile for the position. Our firm takes developing the profile very seriously as the profile is the focal point of our recruitment efforts. We are eager to interview each Board member individually and visit with stakeholder groups who attend scheduled meetings. We will meet with any employees and other stakeholders as identified by the Board. Our firm also offers the opportunity for the community, staff and parents to participate in morning and evening forums that are organized to solicit input via the survey process and create dialogue by asking a series of questions related to the desired characteristics of the new Superintendent. The purpose of these meetings will be to educate them about the process as well as to gather and organize information that will contribute to the development of an accurate profile for the position.

In addition, for those stakeholders unable to attend scheduled meetings, our firm offers an online profile survey option with space for written comments/recommendations which is available in various languages at no additional fee. We will provide you with a link to place on the District website. Our office will maintain, collect and analyze all information received and include this in the report to the Board.

Our process consists of Q and A sessions and the administration of our own 33 Desirable Characteristics Survey. This is culminated in an open meeting report to the Board of our findings and recommendations. We will present a tabulated and analyzed graphic report in which Board members' and stakeholders' survey responses are reviewed looking for those characteristics chosen most in common by the various groups and indicate those recommended or those thought to be worthy of consideration. On some occasions, two of the items may be combined when they are closely related in context. Those items that seem to be important to some groups but not to others may be used in the recruitment of candidates and as questions during the interview process by the Board. At the encouragement of the consultants, many survey respondents will provide additional comments to the Board which are presented as a part of this report. Our dialogue with constituents and interviews with individual Board members, coupled with survey results, provide our firm with an accurate profile that is employed in the recruiting and careful screening of applicants. The characteristics most commonly selected will be used later in promotional materials.

## INTERVIEW PROCESS – COMMUNITY INPUT

Boards that have chosen the option to involve the public and employees during the interview phase of the search have found that we have been very effective in organizing this part of the process. Serious candidates who submit to being interviewed by personnel other than the Board itself are prepared for this by our consultants. Participants in these groups are requested to complete a "Candidate Impressions" form that is duplicated for each Board member's review and are requested not to rank the candidates.

It is also requested by some of our client school Boards that the top two (sometimes three) finalists are brought back to the District for an open forum with the public. We provide a proven process for this as well that includes a moderator. Questions from the audience are submitted in writing to ensure that the candidates are only asked about legitimate issues related to the position.

# RECRUITMENT

Ray and Associates, Inc. maintains a working relationship with key individuals at the college and university level along with other national public and private organizations for the purpose of recruiting outstanding candidates. However, we are not directly connected with any college, university or any other organization. This allows our firm to be extremely objective in the search process. We stay abreast of the performance of outstanding school administrators throughout the country, which has contributed to our high success rate.

Our firm maintains a very large pre-screened database of top candidates who are interested in new and challenging positions. The strengths and administrative skills of these potential candidates have been analyzed by the firm. However, it is important for our clients to know we are not a placement service that owes any favors to prospective candidates. Our professional objective is to aggressively recruit and advertise for the best candidate who meets the qualifications and characteristics of a Superintendent as set forth by the Board. Our recruitment process is very comprehensive, highlighted by the following steps:

- Largest recruiting network in the country
- Inform the firm's associates of the position and seek recommendations
- Advertise in local, regional and national venues known for high readership by school leaders
- Consult our extensive database for precise matches between District and candidate profiles
- Aggressively recruit successful school leaders who are not currently seeking a new position to invite them to consider the Farmington Public Schools position
- Contact other organizations at state, regional and national levels regarding the position
- Proactively seek out potential candidates at state and national conventions



## SCREENING, REFERENCE CHECKS, INTERVIEWS AND FINAL SELECTION

Once recruited, all applicants are screened from the perspective of a viable match with Board criteria to determine their capabilities, strengths and weaknesses. The search team thoroughly reviews each file and seeks alignment of qualifications with Board expectations. Those who emerge successfully from this screening are termed viable candidates, and our background research team then conducts extensive background investigations and internet checks on those individuals. The investigations go well beyond listed references and their current position to include contacts with state associations and national leadership organizations such as American Association of School Administrators (AASA), Association of Latino Administrators and Superintendents (ALAS) and National Association of Black School Educators (NABSE). Our firm also checks current and past relationships with administrators and verifies candidate's education and work history utilizing multiple internet sites and social media feeds. We not only vet candidates extensively in their professional career, but it is also important for us to be familiar with their personal life as that can have an impact in their profession. The candidates who meet the qualifications selected by the Board become top candidates.

As part of the candidate presentation to the Board, Ray and Associates will bring before the Board 8-12 top candidates for the Board's consideration. Board members will have the opportunity to observe each top candidate interviewed with questions specifically designed to the Superintendent search through video technology. The Board will also have a chance to review the application packet submitted by each top candidate.

Upon the completion of the review, Board members will be asked to individually complete a matrix which allows them to assess each top candidate against the others. The Ray and Associates representative will then provide the Board with a summary of the individual Board responses. This summary assists the Board members in reaching consensus on which candidates are worthy of an interview. Following these steps ensures that all Board members have an equal opportunity to be involved in the selection process.

Ray and Associates will conduct criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees on the top 2-3 candidate(s) through an outside service at no additional cost.



## SECTION II

### MONITORING THE SEARCH PROCESS - CLIENT CHECKPOINTS

The Board's role is the most important one in the search process. Although we assist you in the process by actively recruiting, identifying and recommending qualified candidates, you alone will determine which candidate you will hire.

Our search process is set up in a manner that provides the Board with a continuous monitoring capability which features clearly defined checkpoints:

Timeline	•Establish a timeline for the process
Input	•Determine the input process
Qualifications	•Set the Superintendent qualifications
Flyers	•Review and approve informational flyers and application forms
Progress Reports	•Receive regular progress reports from the consultant
Interview Process	•Approve format and questions for the interview process
Candidates	•Select candidates for final interview
Hiring	•Hire the candidate
Contract	•Determine and approve the contract
Press Release	•Approve the press release

These check points assure that you know the progress of the search and have the information to be fully informed and in control of the search.

## SECTION III

### SEARCH COST – THE COMPLETE PROCESS

The cost of our Proposal is for a complete search. The Board will be guided and assisted by Ray and Associates, Inc. at every step in the search process from the initial phase of determining the desired qualities for the position through the actual hiring of the new Superintendent. Our process is flexible. If the Board desires a different approach or would prefer certain options other than those provided in our Proposal, we can adjust our process to meet your specific requirements.

### COST BREAKDOWN

**The Consultant Fee.** The base fee for the performance of the Superintendent search by the consultant as provided in this Proposal will be nineteen thousand dollars (\$19,000.00). If the Board selects only certain elements offered in this package, or requests services not included in this package, our fees and reimbursed expenses will be adjusted accordingly. The firm will discuss any modifications relating to the search fee regarding our services at the formal presentation. The Superintendent search fee shall be paid in three (3) installments; 1/2 of total fee is due upon signing of the contract; 1/4 of fee is due at the time of the stakeholder meetings; and the final 1/4 of fee is due when the Superintendent is officially hired by the District.

We will provide the Board with criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.

There is no charge by Ray and Associates for the services to assist the Board in negotiating a contract with the new Superintendent and the development of the contract terms.

**Consultant Reimbursed Expense.** Certain expenses, including travel, lodging, meals, shipping, and other search related expenses will be kept to a minimum and are to be reimbursed by the District. Said expenses will be invoiced as they occur and will include a detailed account listing of such expenses.

**Candidate Expenses.** **If the District determines to reimburse candidates for interview expenses, expenses may include travel, lodging and meals for the candidate and spouse. Candidates are to submit all receipts and expense documentation to a designated individual at the District and said expenses will be paid by the District as they occur.**

**Cost Saving Expense Options.** Ray and Associates, Inc. is aware of budget concerns and therefore offers several cost saving options: 1) Conduct 3 meetings with our consultants via Zoom, conference call or gotomeetings, which could potentially save thousands of dollars in travel expenses; 2) Utilize our materials electronically (either via e-mail or a flash drive); and 3) Boards may conduct 1<sup>st</sup> round candidate interviews via Zoom to reduce candidate travel expenses. Once the Board narrows the candidates down to two or three finalists, the finalists will interview in-person with the Board.

### PERFORMANCE CONTRACT

Ray and Associates, Inc. will provide a written agreement between the Board and the consulting firm which will contain the provisions of this Proposal and any modifications or changes mutually agreed by the parties.

# **ESTIMATED COST SHEET – PREPARED FOR: FARMINGTON PUBLIC SCHOOLS**

Ray and Associates, Inc. will spend as much time as needed to conduct a successful search for the Farmington Public Schools. Please Note: Our flat fee is inclusive of all services. The only hourly rates that would apply would be for requests above and beyond this Proposal and would be at the following rates:

**Consultant \$100.00/hr**  
**Administrative Asst. \$25.00/hr**

**Travel**

Flight .....	1,000.00
Ground transportation (billed at \$0.575 per mile).....	1,100.00
Hotel (if needed for stakeholder meetings) .....	400.00
Meals .....	200.00
** Travel Subtotal.....	2,700.00

**\*\*Expenses may be less if district utilizes local consultant or cost saving meetings.**

**Shipping:** (Federal Express to the District, materials to search coordinator, candidate information after the candidates have been selected from the screening process)..... 500.00

Ray and Associates, Inc. Estimated Expense Total: .....3,200.00  
Ray and Associates, Inc. Base Fee ..... 19,000.00

**\*ESTIMATED SEARCH COST ..... \$22,200.00**

**\*Does not include estimated advertising or candidate expenses for interviews.**

\*\*The actual number of candidates interviewed is the Board’s decision. The estimate per candidate for interview expenses is \$2,000; however, it is dependent on the candidate’s geographic location. Candidate travel expense reimbursement is the responsibility of the District.

All expenses are estimates, based on past experiences. The Farmington Public Schools will be billed for only the actual expenses incurred.

**Board Approved Advertising**

We exhibit advertising as a separate entity because the cost is based on the Farmington Public Schools decisions on how extensive the need. Our associates make recommendations and the Board has the final authority on frequency and dollars spent. **(Estimated Advertising is \$5,000.00)**

**Ray and Associates, Inc. does not collect a commission for placing the ads.**

# GENERAL PROVISIONS

## CONFIDENTIALITY

The nature of our work and our ability to carry out our responsibility to you is directly related and dependent upon our present and past experience in providing similar services to others. *The firm will preserve the confidential nature of any information which becomes available to the firm resulting from the services rendered to the Board.*

As our client, you also need to maintain the confidentiality of information provided by Ray and Associates, Inc.

## FOLLOW-UP AFTER THE SEARCH: BOARD SELF-ASSESSMENT SURVEY FOCUS ON FUTURE PLANNING

Included in the base fee, the consultants from Ray and Associates, Inc. will spend time with the Board reflecting upon current Board governance procedures. In respect to governance and District initiatives, we have found that there is really no better time than very early in the tenure of a new Superintendent to assess issues and expectations.

ROUND 1: At the conclusion of the search, we will provide the Board with a link to an online survey concerning current District governance practices as well as key District challenges and opportunities for improvement. Assessment results are then analyzed and shared with the Board and the new Superintendent. The results can be emailed, presented in-person or via Zoom.

ROUND 2: About six months after the new Superintendent begins, we will provide the survey again to be completed by the current Board and the Superintendent. As in round one, at no cost to the District, the results will be analyzed and shared with the Board and Superintendent to assist with teambuilding every year thereafter as long as that Superintendent is in tenure.

Through the aforementioned process, we are afforded an in-depth view of your school district. As part of our presentation, we will also provide insight and suggestions for organizational improvements. Ray and Associates has developed several training/workshops targeted at increasing organizational performance and efficiency which may be of interest to your school district at this time of significant leadership transition. Our firm belief is the workshops/training can increase the effectiveness of both the Board and Superintendent, enhance their relationship, and provide for an optimum learning environment to improve student achievement.

## SATISFACTION GUARANTEED

We provide a termination provision in our contractual agreement with the Farmington Public Schools. If the Farmington Public Schools or Ray and Associates, Inc. terminate this agreement, the Farmington Public Schools will be charged only for the work performed and expenses incurred up to the date of termination.

If the Board is dissatisfied with the new Superintendent within two years from the date of employment of the Superintendent and if either party dissolves that relationship by resignation or termination within a two-year period of the initial employment, the firm of Ray and Associates, Inc. will conduct a new Superintendent search at no cost to the District, except for expenses.

Furthermore, we do not recruit candidates we have placed for a minimum of 5 years.

## REFERENCES

We have chosen several clients from our past and recent search list to demonstrate that we have been successful in various geographic locations.

SCHOOL DISTRICT	LOCATION	CONTACT PERSON	TITLE OF CONTACT	PHONE NUMBERS/ E-MAIL
<b>Grand Rapids Public Schools</b>	Grand Rapids, MI	Kristian Grant	Board President	<a href="mailto:kristiangrant@12oakes.com">kristiangrant@12oakes.com</a> Cell: 616-862-3928
<b>Indian Prairie School District 204</b>	Naperville, IL	Michael Raczak	Board President	<a href="mailto:mike_raczak@ipspd.org">mike_raczak@ipspd.org</a> Cell: 630-421-0714
<b>Hillsborough County Public Schools</b>	Tampa, FL	Steve Cona	Board Member	Cell: 813-310-8557
<b>Cleveland Heights-University Heights City School District</b>	University Heights, OH	Jodi Sourini	Board President	Cell: 216-906-3556 <a href="mailto:j_sourini@chuh.org">j_sourini@chuh.org</a>
<b>Everett Public Schools</b>	Everett, WA	Caroline Mason	Board President	Cell: 425-238-7308 <a href="mailto:caroline.mason@everettsd.org">caroline.mason@everettsd.org</a>
<b>Westside Community Schools</b>	Omaha, NE	Adam Yale	Board Member	Cell: 402-672-2294 <a href="mailto:yale.adam@westside66.net">yale.adam@westside66.net</a>
<b>Waxahachie Independent School District</b>	Waxahachie, TX	Dusty Autrey	Board President	Cell: 972-670-7121 <a href="mailto:dautrey@wisd.org">dautrey@wisd.org</a>
<b>Berlin Area School District</b>	Berlin, WI	Catherine Kujawa	Board President	Cell: 920-279-4657 <a href="mailto:ckujawa@berlin.k12.wi.us">ckujawa@berlin.k12.wi.us</a>
<b>Woodland Hills School District</b>	North Braddock, PA	Jamie Glasser	Board President	Cell: 412-874-0161 <a href="mailto:glasja@whsd.net">glasja@whsd.net</a>
<b>Tangipahoa Parish School System</b>	Amite, LA	Therese Domiano	Former Board President	Cell: 985-974-2955
<b>Lawrence Public Schools</b>	Lawrence, KS	Shannon Kimball	Former Board President	Cell: 785-840-7722 <a href="mailto:skimball@usd497.org">skimball@usd497.org</a>
<b>Pittsburg Community Schools USD 250</b>	Pittsburg, KS	Marlene Willis	Former Board President	Cell: 602-404-8835 <a href="mailto:mwillis@usd250.org">mwillis@usd250.org</a>
<b>Savannah-Chatham County Public Schools</b>	Savannah, GA	Mary Davis-Brown	Board Secretary	Work: 912-395-1014 <a href="mailto:Mary.Davis-Brown@sccpss.com">Mary.Davis-Brown@sccpss.com</a>
<b>Gresham Barlow School District</b>	Gresham, OR	John Hartsock	Former Board Member	Cell: 503-780-4806
<b>Mercer Island School District</b>	Mercer Island, WA	David D'Souza	Former Board Chair	Cell: 206-202-0894 <a href="mailto:david.dsouza@mercerislandschools.org">david.dsouza@mercerislandschools.org</a>
<b>Durham Public Schools</b>	Durham, NC	Minnie Forte-Brown	Board Member	Cell: 919-452-2177 <a href="mailto:fortebrown.minnie@gmail.com">fortebrown.minnie@gmail.com</a>

<b>Council Bluffs Community School District</b>	Council Bluffs, IA	Troy Arthur	Former Board President	Cell: 402-651-0956 <a href="mailto:Troyarthur4cb@gmail.com">Troyarthur4cb@gmail.com</a>
<b>Flagstaff Academy</b>	Longmont, CO	Wayne Granger	Executive Director	Cell: 720-864-9094 <a href="mailto:wgranger@flagstaffacademy.org">wgranger@flagstaffacademy.org</a>
<b>Poway Unified School District</b>	San Diego, CA	Michelle O'Connor-Ratcliff	Former Board President	District: 858-521-2704 <a href="mailto:moconnorratcliff@powayusd.com">moconnorratcliff@powayusd.com</a>
<b>Howard-Winneshiek Community School District</b>	Cresco, IA	Clint Farlinger	Business Manager/Board Secretary	Wk: 563-547-2762 <a href="mailto:cfarlinger@howard-winn.k12.ia.us">cfarlinger@howard-winn.k12.ia.us</a>
<b>Olathe Public Schools</b>	Olathe, KS	Rick Schier	Former Board President	Home: 913-530-3644 <a href="mailto:rickschierboe@gmail.com">rickschierboe@gmail.com</a>
<b>Joplin Schools</b>	Joplin, MO	Jeff Koch	Former Board President	Work: 417-529-1236 <a href="mailto:jeffrykoch@hotmail.com">jeffrykoch@hotmail.com</a>
<b>Austin Independent School District</b>	Austin, TX	Vince Torres	Former Board President	Cell: 512-784-0620
<b>Northshore School District</b>	Bothell, WA	Amy Cast	Former Board President	Cell: 206-601-7909 <a href="mailto:Sbdistrict5@nsd.org">Sbdistrict5@nsd.org</a>
<b>Des Moines Public Schools</b>	Des Moines, IA	Dick Murphy	Former Board President	Cell: 515-250-5567 Hm: 515-278-6048 <a href="mailto:rmurphyia@earthlink.net">rmurphyia@earthlink.net</a>
<b>Maury County Public Schools</b>	Columbia, TN	Jim Morrison	Former Board President	Wk: 615-350-7637 Cell: 931-446-2438 <a href="mailto:jcment@cpws.net">jcment@cpws.net</a>
<b>Brevard Public Schools</b>	Viera, FL	Robert Jordan	Former Board Chairman	Cell: 321-698-7110 Work: 321-383-4813 <a href="mailto:Robert.Jordan@genesisvii.com">Robert.Jordan@genesisvii.com</a>
<b>Collier County Public Schools</b>	Naples, FL	Allun Hamblett	Former Deputy Chief Administrative Officer	Cell: 239-398-0761 <a href="mailto:ARHAssociates@comcast.net">ARHAssociates@comcast.net</a>
<b>Howard County Public School System</b>	Ellicott City, MD	Brian Meshkin	Former Board Member	Cell: 949-812-0081 <a href="mailto:brian@brianmeshkin.com">brian@brianmeshkin.com</a>
<b>Fargo Public Schools</b>	Fargo, ND	Jim Johnson	Former Board President	Cell: 701-200-4794 Work: 701-232-7481 <a href="mailto:johnsji@fargo.k12.nd.us">johnsji@fargo.k12.nd.us</a>
<b>Glen Ellyn School District 41</b>	Glen Ellyn, IL	Erica Nelson	Former Board President	Work: 630-452-4349 <a href="mailto:npdnelson1@gmail.com">npdnelson1@gmail.com</a>
<b>Paradise Valley Unified School District</b>	Phoenix, AZ	Anne Greenberg	Board Member	Cell: 602-751-6642 Hm: 602-493-6642 <a href="mailto:asgpvusdBoard@cox.net">asgpvusdBoard@cox.net</a>
<b>Manheim Township School District</b>	Lancaster, PA	Hannah Bartges	Former Board President	Hm: 717-569-4484 <a href="mailto:jonbartges428@comcast.net">jonbartges428@comcast.net</a>
<b>Willingboro Township Public Schools</b>	Willingboro, NJ	Dennis Tunstall	Former Board President	Cell: 609-405-0242 Hm: 609-877-7056 <a href="mailto:dennis.tunstall@comcast.net">dennis.tunstall@comcast.net</a> <a href="mailto:Dtunstall@wboe.net">Dtunstall@wboe.net</a>

*This is not a complete list, and more references can be provided upon request.*

*Ray and Associates, Inc.*  
*Leaders in Executive Searches*

**"What school boards say about Ray and Associates"**

*"From the very beginning, they delivered professional, comprehensive services. The firm developed a rigorous timeline and met all its commitments. Ray and Associates, Inc. provided professional services in a consumer-friendly manner that allowed us to select a superintendent that will serve our community well."*

May 20, 2020  
Mr. Michael Raczak, Board President  
Indian Prairie School District 204, IL  
Enrollment: 27,400

*"The quality of services provided by Ray and Associates cannot be understated and their ability to bring consensus among board members was phenomenal. While they provided support, they also respected our role as a board taking the lead in many aspects of the process. They were professional and knowledgeable throughout the entire process. I would highly recommend Ray and Associates to any School Board who wants to conduct a national search."*

Search completed January 2020  
Mr. Steve Cona III, Board Vice Chairman  
Hillsborough County Public Schools, FL  
Enrollment: 220,000

*"We chose Ray and Associates for our search based on their long successful track record and the individuals with whom we worked closely. Their in-depth knowledge of conducting a national search, large number of consultants through out the country, and strong recommendations from other boards put them at the top of the list after our search firm interviews. I am confident Ray and Associates and their team of consultants would do the same outstanding job for other school boards needing consultation in the hiring of a new superintendent."*

August 7, 2019  
Ms. Caroline Mason, Board Vice President  
Everett Public Schools, WA  
Enrollment: 21,000

*"Ray & Associates sat down with us to help develop what type of candidate we were in the market for and helped us to create a process that produced the most suitable candidate for the demographics of our district. Ray & Associates' professionalism was unparalleled as they worked alongside us to entertain all ideas, suggestions and opinions we had to aide in our search. They had a complete understanding and respect for our timeline, being expedient in deliverables. The Berlin Area School District Board of Directors is pleased to recommend the expertise of Ray & Associates and their seasoned team members."*

July 15, 2019  
Ms. Catherine Kujawa, Board President  
Berlin Area School District, WI  
Enrollment: 1,600

*"The Woodland Hills School Board had a very positive experience in working with the company to hire a Superintendent. The guidance and knowledge provided was invaluable, as was the depth and breadth of the search that was conducted. Ray & Associates, and Mr. Collins, were highly professional throughout our interaction. We appreciated your willingness to help us with the process that we wanted to employ, and to bring that process to fruition. Most importantly, you allowed the Board to choose from a strong pool of candidates and identify a leader that will continue our progress toward a stronger District that will benefit our kids."*

September 16, 2018  
Jamie Glasser, Esq., Board President  
Woodland Hills School District, PA  
Enrollment: 3,600

# ALL EXECUTIVE SEARCH FIRMS ARE NOT THE SAME!

*Ray and Associates, Inc.*

## *THE CLEAR DIFFERENCE...*

- ✓ We customize every search to meet the specific needs of our clients.
- ✓ We have the largest professional recruiting network in the country.
- ✓ We have a highly qualified, full-time staff that is readily accessible to respond to both clients and candidates.
- ✓ We maintain a large, prescreened database of traditional and non-traditional candidates from across the country.
- ✓ We aggressively recruit candidates who closely match the District profile.
- ✓ We provide an attractive, user-friendly and informative website that allows candidates to access application materials on-line.
- ✓ We receive more applications than any search firm in the nation.
- ✓ We interview each individual Board member in order for them to provide information and insight into the development of the profile characteristics for the position.
- ✓ We collect and organize community and staff input when desired by the Board and provide a report that is highly useful in establishing the position criteria. In addition, our firm offers an online survey in various languages and will provide a link to the survey to post on the District's website.
- ✓ We offer the option to have our office design and develop the promotional application and flyer for the position.
- ✓ We have the most complete and comprehensive investigative system to assure our clients of candidate quality.
- ✓ We have a unique and successful consensus building process for Boards who may be split on candidates or other issues.
- ✓ We have been highly successful in providing a large diverse pool of candidates in all of our searches.
- ✓ We provide an in-depth candidate video interview to the Board.
- ✓ We provide criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.
- ✓ We provide a two-year guarantee clause in our contract with our clients.
- ✓ We do not recruit candidates we have placed for a minimum of 5 years.
- ✓ We provide a service to our clients after the Superintendent is hired to ensure a smooth transition and to establish realistic expectations at the outset.